

PUBLIC UTILITIES COMMISSION

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January 8, 2009

Advice Letter 3912

Ronald van der Leeden, Director
Rates, Revenues and Tariffs
8330 Century Park Court CP32C
San Diego, CA 92123-1548

**Subject: Establishment of the 2009-2011 Energy Efficiency Memo
Account (EEMA) Pursuant to D.08-10-027**

Dear Mr. Leeden:

Advice Letter 3912 is effective January 1, 2009.

Sincerely,

A handwritten signature in blue ink that reads "Julie A. Fitch".

Julie A. Fitch, Director
Energy Division



Ken Deremer
Director
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October 27, 2008

Advice No. 3912
(U 904 G)

Public Utilities Commission of the State of California

Subject: Establishment of the 2009-2011 Energy Efficiency Memo Account (EEMA) Pursuant to Decision (D.) 08-10-027

In compliance with Ordering Paragraph (OP) 2 of D.08-10-027, dated October 16, 2008, Southern California Gas Company (SoCalGas) hereby submits for approval by the California Public Utilities Commission (Commission) revisions to its tariff schedules, applicable throughout its service territory, as shown on Attachment B.

Purpose

This filing establishes the 2009-2011 EEMA and provides a list of the 2009 Transition Programs along with the 2009 average monthly budgets authorized to record into SoCalGas' Demand Side Management Balancing Account (DSMBA).

Background

Pursuant to D.08-10-027, the Commission, on October 16, 2008, authorized SoCalGas and other affected utilities to continue certain 2008 energy efficiency programs until the Commission adopts a final decision on the utilities' 2009-2011 Energy Efficiency portfolio applications. The decision authorizes a monthly portfolio bridge funding for 2009 based on the utilities' average of their 2006-2008 program budgets, increased for energy savings goals for 2009-2011 and Evaluation, Measurement and Verification (EM&V) costs. SoCalGas' authorized monthly bridge funding is \$7,203,063.¹

Establishment of the 2009-2011 EEMA

In compliance with OP 2.b. of D.08-10-027, SoCalGas is establishing the 2009-2011 EEMA to record the difference between the revenue requirement adopted for the Bridge Funding period and the revenue requirement requested in the 2009-2011 Energy Portfolio Application (A.) 08-07-021, et al. beginning on January 1, 2009. The "requested" revenue requirement will be trued-up with

¹ SoCalGas' authorized monthly program funding is incorrectly shown as \$8,484,183 in Table 2 of the D.08-10-027 (page 18) due to a math error in totaling the monthly program budget reflected in the "subtotal" line and the 8% increase for EM&V costs. The authorized monthly amount should be \$7,203,063 (\$6,669,503 + \$553,560).

the adopted revenue requirement in the Commission's decision on the 2009-2011 Energy Portfolio applications.

2009 Transition Programs and Corresponding Average Monthly Budgets

In compliance with OP 2.a. of D.08-10-027, SoCalGas is providing a list (see Attachment C) of 2009 Transition Programs along with the corresponding 2009 monthly budgets authorized to be recorded in SoCalGas' DSMBA.

SoCalGas' transitional programs are arranged according to the following program sector fund shifting categories: Cross-cutting, Nonresidential and Residential Sectors. The list of programs is provided within each sector. Each sector consists of utility-core programs, partnerships and/or third parties approved for implementation in the 2006-2008 program cycle. SoCalGas notes that although all partnership programs operational during the Bridge Funding are identified, only the total Partnership budgets within each sector are provided. SoCalGas can provide individual partnership program budgets after it has concluded discussions and finalized budgets with the individual partnership programs.

All current fund shifting guidelines² will apply during the bridge period; the transitional program categories listed above will serve as the starting point for any fund shifts during the bridge period.

SoCalGas has identified a broad list of activities covered under EM&V. SoCalGas identified 25 percent of the authorized EM&V budget in D.08-10-027 Table 2 to cover its own EM&V activities, including Strategic Planning as required.³ The remaining 75 percent of the budget is identified as part of the Energy Division's (ED) EM&V budget. Items identified under this category include the budgets for the Web Portal development and Marketing, Education & Outreach (ME&O) and other ED EM&V activities.⁴

Protest

Anyone may protest this advice letter to the Commission. The protest must state the grounds upon which it is based, including such items as financial and service impact, and should be submitted expeditiously. The protest must be made in writing and received within 20 days of the date this advice letter was filed with the Commission. There is no restriction on who may file a protest. The address for mailing or delivering a protest to the Commission is:

CPUC Energy Division
Attention: Tariff Unit
505 Van Ness Avenue
San Francisco, CA 94102

Copies of the protest should also be sent via e-mail to the attention of both Maria Salinas (mas@cpuc.ca.gov) and Honesto Gatchalian (jni@cpuc.ca.gov) of the Energy Division. A copy of the protest shall also be sent via both e-mail and facsimile to the address shown below on the same date it is mailed or delivered to the Commission.

² See Energy Efficiency Policy Manual Version 4.0, Table 8, p.36.

³ D.08-10-027 at page 18.

⁴ D.08-10-027 OP 1.d.

Attn: Sid Newsom
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Effective Date

SoCalGas believes that this filing is subject to Energy Division disposition and should be classified as Tier 2 (effective after staff approval) pursuant to GO 96-B. This filing is consistent with D.08-10-027 and, therefore, SoCalGas respectfully requests that this filing be approved on November 26, which is 30 calendar days from the date filed for implementation and inclusion in rates effective on January 1, 2009.

Notice

A copy of this advice letter is being sent to the parties listed on Attachment A, which includes the interested parties in A.08-07-022.

KEN DEREMER
Director
Tariffs and Regulatory Accounts

Attachments

CALIFORNIA PUBLIC UTILITIES COMMISSION

ADVICE LETTER FILING SUMMARY ENERGY UTILITY

MUST BE COMPLETED BY UTILITY (Attach additional pages as needed)

Company name/CPUC Utility No. **SOUTHERN CALIFORNIA GAS COMPANY (U 904-G)**

Utility type:

ELC GAS
 PLC HEAT WATER

Contact Person: Sid Newsom

Phone #: (213) 244-2846

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EXPLANATION OF UTILITY TYPE

ELC = Electric GAS = Gas
PLC = Pipeline HEAT = Heat WATER = Water

(Date Filed/ Received Stamp by CPUC)

Advice Letter (AL) #: 3912

Subject of AL: Establishment of 2009-2011 Energy Efficiency Memorandum Account

Keywords (choose from CPUC listing): Energy Efficiency; Memorandum Account

AL filing type: Monthly Quarterly Annual One-Time Other

AL filed in compliance with a Commission order, indicate relevant Decision/Resolution #:

D08-10-027

Does AL replace a withdrawn or rejected AL? If so, identify the prior AL No

Summarize differences between the AL and the prior withdrawn or rejected AL¹: N/A

Does AL request confidential treatment? If so, provide explanation: No

Resolution Required? Yes No

Tier Designation: 1 2 3

Requested effective date: 1/1/09

No. of tariff sheets: 5

Estimated system annual revenue effect (%): _____

Estimated system average rate effect (%): _____

When rates are affected by AL, include attachment in AL showing average rate effects on customer classes (residential, small commercial, large C/I, agricultural, lighting).

Tariff schedules affected: PS VI - Memorandum Accounts; TOCs

Service affected and changes proposed¹: N/A

Pending advice letters that revise the same tariff sheets: None

Protests and all other correspondence regarding this AL are due no later than 20 days after the date of this filing, unless otherwise authorized by the Commission, and shall be sent to:

CPUC, Energy Division

Attention: Tariff Unit

505 Van Ness Ave.

San Francisco, CA 94102

mas@cpuc.ca.gov and jnj@cpuc.ca.gov

Southern California Gas Company

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¹ Discuss in AL if more space is needed.

ATTACHMENT A

Advice No. 3912

(See Attached Service Lists)

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SACRAMENTO, CA 95814-3577

ATTACHMENT B
Advice No. 3912

Cal. P.U.C. Sheet No.	Title of Sheet	Cancelling Cal. P.U.C. Sheet No.
Revised 43999-G	PRELIMINARY STATEMENT - PART VI - MEMORANDUM ACCOUNTS, DESCRIPTION AND LISTING OF MEMORANDUM ACCOUNTS, Sheet 1	Revised 43307-G**
Original 44000-G	PRELIMINARY STATEMENT - PART VI - MEMORANDUM ACCOUNTS, 2009-2011 ENERGY EFFICIENCY MEMORANDUM ACCOUNT, (EEMA)	
Revised 44001-G	TABLE OF CONTENTS	Revised 43998-G
Revised 44002-G	TABLE OF CONTENTS	Revised 43408-G**
Revised 44003-G	TABLE OF CONTENTS	Revised 43963-G*

PRELIMINARY STATEMENT - PART VI - MEMORANDUM ACCOUNTS
DESCRIPTION AND LISTING OF MEMORANDUM ACCOUNTS

Sheet 1

A. GENERAL

Memorandum accounts are special accounts authorized by the Commission for the purpose of tracking certain costs and revenues. Please refer to each individual memorandum account description for the specific accounting treatment applicable to each account.

B. LISTING OF MEMORANDUM ACCOUNTS

- PCB Expense Account (PCBEA)
- Research Development and Demonstration Expense Account (RDDEA)
- Curtailed Violation Penalty Account (CVPA)
- Economic Practicality Shortfall Memorandum Account (EPSMA)
- Catastrophic Event Memorandum Account (CEMA)
- Vernon Avoided Distribution Cost Memorandum Account (VADCMA)
- Vernon Rate Savings Memorandum Account (VRSMA)
- Vernon Negotiated Core Contract Memorandum Account (VNCCMA)
- Research Royalty Memorandum Account (RRMA)
- NGV Research Development & Demonstration Memorandum Account (RDDNGV)
- Intervenor Award Memorandum Account (IAMA)
- Z Factor Account (ZFA)
- Wheeler Ridge Firm Access Charge Memorandum Account (WRFACMA)
- Gas Industry Restructuring Memorandum Account (GIRMA)
- Self-Generation Program Memorandum Account (SGPMA)
- Baseline Memorandum Account (BMA)
- Blythe Operational Flow Requirement Memorandum Account (BOFRMA)
- Cost of Service Revenue Requirement Memorandum Account (COSRRMA)
- FERC Settlement Proceeds Memorandum Account (FSPMA)
- Late Payment Charge Memorandum Account (LPCMA)
- San Diego Gas & Electric Storage Memorandum Account (SDGESMA)
- Gain/Loss On Sale Memorandum Account (GLOSMA)
- Affiliate Transfer Fee Account (ATFA)
- Firm Access Rights Memorandum Account (FARMA)
- Otay Mesa System Reliability Memorandum Account (OMSRMA)
- General Rate Case Revenue Requirements Memorandum Account (GRCRRMA)
- Noncore Storage Memorandum Account (NSMA)
- G-PAL Memorandum Account (GPMA)
- Long Beach Storage Memorandum Account (LBSMA)
- Southwest Gas Storage Memorandum Account (SGSMA)
- 2009-2011 Energy Efficiency Memorandum Account (EEMA)

N

(TO BE INSERTED BY UTILITY)
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 DECISION NO. 08-10-027

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 Regulatory Affairs

(TO BE INSERTED BY CAL. PUC)
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PRELIMINARY STATEMENT - PART VI - MEMORANDUM ACCOUNTS
2009-2011 ENERGY EFFICIENCY MEMORANDUM ACCOUNT
(EEMA)

N
N
N

1. Purpose

The EEMA is an interest bearing memorandum account that is not recorded on SoCalGas' financial statements. Pursuant to D.08-10-027, Bridge Funding for 2009 Energy Efficiency Programs, effective January 1, 2009, the EEMA will record the difference between the revenue requirement adopted for the bridge funding period and the revenue requirement requested and eventually approved in the 2009-2011 Energy Efficiency Portfolio Application (A.) 08-07-022.

N

2. Applicability

See Disposition section.

3. Rates

The balance in the EEMA will be included in Public Purpose Program (PPP) gas surcharge rates upon Commission approval.

4. Accounting Procedures

SoCalGas maintains this account by making monthly entries as follows:

- a) A debit entry equal to the authorized monthly revenue requirement requested in the 2009-2011 Energy Portfolio A.08-07-022 (subject to true-up based on the actual revenue requirement adopted in that application),
- b) A credit entry equal to the authorized monthly revenue requirement for the bridge funding period adopted in D.08-10-027,
- c) An entry for amortization of the EEMA balance as authorized by the Commission, and
- d) An entry equal to interest on the average of the balance in the account during the month, calculated in the manner described in Preliminary Statement, Part I, J.

5. Disposition

The disposition of the account balance will be incorporated in SoCalGas' annual PPP gas surcharge rate update filing for PPP rates effective January 1 of the following year.

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The following listed sheets contain all effective Schedules of Rates and Rules affecting service and information relating thereto in effect on the date indicated thereon.

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Gas Industry Restructuring Memorandum Account (GIRMA)	40907-G, 40908-G, 40909-G
Self-Generation Program Memorandum Account (SGPMA)	41105-G
Baseline Memorandum Account (BMA)	40911-G
Blythe Operational Flow Requirement Memorandum Account (BOFRMA)	41830-G
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FERC Settlement Proceeds Memorandum Account (FSPMA)	40914-G
Late Payment Charge Memorandum Account (LPCMA)	43700-G
San Diego Gas & Electric Storage Memorandum Account (SDGESMA)	40917-G
Gain/Loss on Sale Memorandum Account (GLOSMA)	42133-G
Affiliate Transfer Fee Account (ATFA)	40919-G
Firm Access Rights Memorandum Account (FARMA)	41493-G
Otay Mesa System Reliability Memorandum Account (OMSRMA)	42004-G
General Rate Case Revenue Requirements Memorandum Account (GRCRRMA)	43701-G
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ATTACHMENT C

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**List of 2009 Transition Programs and Corresponding
Average Monthly Budgets**

SOUTHERN CALIFORNIA GAS COMPANY
Proposed Monthly Program Budgets

Program ID	Program Name	Segment	Monthly Budget	Annual Budget
Cross Cutting Programs				
SCG3516	SCD4-Sustainable Communities Demo/City of Santa Monica	Crosscutting		
SCG3520	UCP4-IOU/UC/CSU Partnership	Crosscutting		
SCG3521	VCP4-Ventura County Partnership	Crosscutting		
SCG3522	SBP4-South Bay Partnership	Crosscutting		
SCG3523	BKP4-Bakersfield Kern Partnership	Crosscutting		
SCG3524	EC5-Energy Coalition - Peak	Crosscutting		
SCG3525	EC4-Energy Coalition - Direct Install	Crosscutting		
SCG3543	Palm Desert Partnership	Crosscutting		
1	Subtotal Partnerships		\$ 375,408	\$ 4,504,891
SCG3501	CS4-Codes & Standards Program	Crosscutting	\$ 58,081	\$ 696,966
SCG3503	EET4-Education & Training Program	Crosscutting	\$ 309,065	\$ 3,708,780
SCG3504	EMO4-Energy Efficiency Delivery Channel Innovation Program	Crosscutting	\$ 261,870	\$ 3,142,436
SCG3506	ETP4-Emerging Tech Program	Crosscutting	\$ 100,618	\$ 1,207,411
SCG3508	FYP4-Statewide Marketing & Outreach	Crosscutting	\$ 143,238	\$ 1,718,854
SCG3514	OBF4-On-Bill Financing for Energy Efficiency Equipment	Crosscutting	\$ 112,175	\$ 1,346,104
SCG3528	RCX4-RCx Partnership with SCE	Crosscutting	\$ 79,571	\$ 954,853
SCG3530	3P Portfolio of the Future	Crosscutting	\$ 81,118	\$ 973,411
SCG3531	3P PACE Energy Efficient Ethnic Outreach Program	Crosscutting	\$ 96,118	\$ 1,153,411
SCG3532	3P Custom Language Efficiency Outreach Program	Crosscutting	\$ 26,683	\$ 320,202
SCG3533	3P Alliance Partners Program	Crosscutting	\$ 81,118	\$ 973,411
	Subtotal Cross Cutting Programs		\$ 1,725,061	\$ 20,700,730
				\$ -
Nonresidential Programs				
SCG3518	CCP4-IOU/Community College Partnership	Nonresidential		
SCG3519	CDC4-CA Department of Corrections Partnership	Nonresidential		
1	Subtotal Partnerships		\$ 226,234	\$ 2,714,804
SCG3507	EXP4-Express Efficiency Rebate Program	Nonresidential	\$ 1,015,650	\$ 12,187,803
SCG3513	NRF4-Local Business Energy Efficiency Program	Nonresidential	\$ 1,592,443	\$ 19,109,314
SCG3527	LAP4-Los Angeles County partnership	Nonresidential	\$ 48,740	\$ 584,884
SCG3538	3P Cypress Gas Cooling	Nonresidential	\$ 29,451	\$ 353,411
SCG3542	NEW6-Savings By Design SCG SCE Program	Nonresidential	\$ 211,980	\$ 2,543,761
SCG3549	3P Envinta - Energy Challenger	Nonresidential	\$ 10,584	\$ 127,011
	Subtotal Nonresidential Programs		\$ 3,135,082	\$ 37,620,988
				\$ -
Residential Programs				
				\$ -
SCG3502	EED4-Advanced Home Program	Residential	\$ 172,148	\$ 2,065,775
SCG3509	HES4-Home Energy Efficiency Survey	Residential	\$ 81,152	\$ 973,829
SCG3510	MFR4-Multi-Family Rebate Program	Residential	\$ 143,061	\$ 1,716,731
SCG3517	SFR4-Home Efficiency Rebate Program	Residential	\$ 720,935	\$ 8,651,215
SCG3534	3P LivingWise	Residential	\$ 58,618	\$ 703,411
SCG3539	3P Manufactured Mobile Home Program	Residential	\$ 221,195	\$ 2,654,341
SCG3544	3P EDC Domestic Hot Water	Residential	\$ 87,695	\$ 1,052,340
SCG3546	3P Bennigfield - On-Demand Efficiency	Residential	\$ 99,294	\$ 1,191,533
SCG3548	3P Upstream Hi-Efficiency Water Heater Rebates	Residential	\$ 43,794	\$ 525,533
SCG3550	3P Honeywell - Multifamily Direct Therm Savings	Residential	\$ 181,468	\$ 2,177,611
	Subtotal Residential Programs		\$ 1,809,360	\$ 21,712,319
	Total Program Budget		\$ 6,669,503	\$ 80,034,036
				\$ -
Measurement & Evaluation				
				\$ -
2	Strategic Planning		\$ 23,700	\$ 284,396
3	SoCalGas EM&V		\$ 109,690	\$ 1,316,284
4	SoCalGas Subtotal		\$ 133,390	\$ 1,600,680
5	CPUC EM&V		\$ 375,654	\$ 4,507,848
6	Web Portal		\$ -	\$ -
7	DSM Branding Study & Development		\$ 24,516	\$ 294,192
8	PUC Subtotal		\$ 400,170	\$ 4,802,040
	Total EM&V Budget		\$ 533,560	\$ 6,402,720
				\$ -
	Total Portfolio Budget		\$ 7,203,063	\$ 86,436,756

Notes:

- 1 Subtotal Partnership Programs will be distributed among the identified Partnership Programs above.
- 2 Strategic Planning is estimated to be the monthly proposed 2009 Strategic Development & Integration in A.08-07-022 Table 4-5.
- 3 Remainder of the SoCalGas EM&V budget share.
- 4 Assumes SoCalGas receives 25% of total EM&V budget.
- 5 Remainder of the CPUC EM&V budget share.
- 6 Assumes that Energy Division will allocate web portal funds in the near future.
- 7 Estimated share of SoCalGas (10%) based on historical Statewide ME&O budgets if the proposed statewide monthly budget is \$250,000.
- 8 Assumes 75% of total EM&V budget.