

PUBLIC UTILITIES COMMISSION

505 VAN NESS AVENUE
SAN FRANCISCO, CA 94102-3298



June 8, 2017

Advice Letter 5023-A

Ronald van der Leeden
Director of Regulatory Relations
Southern California Gas Company
555 West Fifth Street
Los Angeles, CA 90013-1011

SUBJECT: Approval for 2017 Annual Energy Efficiency Budget Filing

Dear Mr. van der Leeden:

The Energy Division has determined Southern California Gas's (SCG) Advice Letter 5023-A "Request for approval of SCG's 2017 Energy Efficiency Program Portfolio budget, is approved, effective October 3, 2016.

On September 1, 2016, SCG filed Advice Letter 5023, seeking Commission approval of its 2017 Energy Efficiency Program Portfolio budget. Pursuant to D.14.10.046, IOU program administrators were directed to file a Tier 2 Advice Letter containing the budget for the next calendar year's Energy Efficiency portfolio.

In Decision D. 15-10-028 the Commission approved the Energy Efficiency rolling portfolio mechanics for 2016 and beyond, and requested an annual IOU Advice Letter filing with proposed detailed budgets for cost recovery, funds transfer, and contracting purposes. SCG's Advice Letter contains the following: (1) Portfolio cost-effectiveness statement; (2) application summary tables with forecast budgets and savings by sector and program/intervention; and (3) incorporation of reductions and/or increases in program or sector budgets. According to Decision D. 15-10-028 SCG's total portfolio budgets for 2017 should match SCG's budgets authorizations approved in D.14-10-046.

The analysis of Advice Letter 5023 included a detailed comparison of recent quarterly and monthly reports. On November 8, 2016, SCG submitted 5023-A replacing 5023 in its entirety to make necessary minor updates to several tables, and correct typographical and clerical errors. Our analysis of 5023-A did not find any budget discrepancies, but did find one minor clerical discrepancy in the corresponding 2015 ESPI Advice Letter issued in September 2016. We discussed this clerical discrepancy during our conference call between Energy Division and SCG on April 20, 2017. SCG agreed to correct the program number and categorization information in the 2015 ESPI Advice Letter issued in September 2016. This correction will align the descriptions for the SW-FIN-California Hub for EE Financing program with the FIN program information in Advice Letter 5023-A.

SCG was not advised to submit an additional supplement or a substitute sheet to Advice Letter 5023-A.

Protests

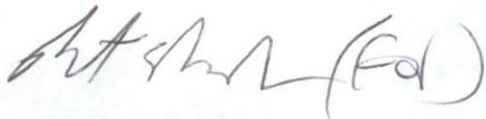
The Protest period was 20 days from the date of the Advice Letter. This Advice Letter was not protested.

We clarify that this disposition approves the continuation of the Energy Efficiency Portfolio 2016 comprehensive budgets and the programs associated with them during the 2017 program year; any proposed 2017 portfolio level budget changes are not approved via this disposition letter but instead will be reviewed as part of the Program Administrator business plan application process. Any issues related to Program Administrator energy efficiency program accounting practices and identified by staff within this 2017 Budget Advice Letter review process will not be addressed here but will be examined by the Commission later in the energy efficiency proceeding.

Accordingly, Advice Letter 5023-A is in compliance with Commission direction and is approved, effective October 3, 2016.

Please contact Mona Dzvova of the Energy Division staff at 415-703-1231 (mona.dzvova@cpuc.ca.gov) if you have any questions.

Sincerely,

A handwritten signature in black ink, appearing to read "Ed Randolph" with a circled "Ed" at the end.

Edward Randolph
Director, Energy Division

cc: Hazlyn Fortune, CPUC
Robert Strauss, CPUC



Ronald van der Leeden
Director
Regulatory Affairs

555 W. Fifth Street, GT14D6
Los Angeles, CA 90013-1011
Tel: 213.244.2009
Fax: 213.244.4957

RvanderLeeden@semprautilities.com

November 8, 2016

Advice No. 5023-A
(U 904 G)

Public Utilities Commission of the State of California

Subject: Supplement - Southern California Gas Company Request for Approval of Annual Energy Efficiency Budget Filing for Program Year 2017

Southern California Gas Company (SoCalGas) hereby submits for approval by the California Public Utilities Commission (Commission) its 2017 Energy Efficiency (EE) Program Portfolio budget. The EE Program Portfolio, along with supporting documentation, is incorporated as Appendices A through C, which have been uploaded to the California Energy Data and Reporting System (CEDARS) website.¹

Purpose

This supplemental filing replaces in its entirety Advice No. 5023, Southern California Gas Company Request for Approval of Annual Energy Efficiency Budget Filing for Program Year 2017, filed on September 1, 2016. This Advice Letter is filed in compliance with Ordering Paragraph (OP) 4 of Decision (D.) 15-10-028, which directs program administrators to file a Tier 2 Advice Letter containing the budget for the next calendar year's EE portfolio by the first business day in September.²

The Southern California Regional Energy Network (SoCalREN) filed a Supplemental Advice Letter (Advice No. #5-E-G-A) on September 23, 2016. Changes from that supplemental filing resulted in necessary updates to several tables in SoCalGas' Advice No. 5023-A. Typographical and clerical errors were also corrected as part of the SoCalGas supplemental filing.

¹ Memorandum from Katie Wu to California Energy Efficiency Program Administrator Regulatory Staff, Clarifications on Annual Budget Filings for Program Year 2017, August 19, 2016, p. 4.

² D.15-10-028, p. 123.

Background

On October 24, 2015, the Commission issued D.14-10-046, which authorizes funding for EE programs until 2025.³ On October 22, 2015, the Commission issued D.15-10-028, which approved the EE rolling portfolio mechanics for 2016 and beyond, and explains that annual Advice Letter filings will propose detailed budgets for cost recovery, transfer, and contracting purposes.⁴ As required in D.14-10-046 and D.15-10-028, this Advice Letter contains the requested details, including the following: (1) Portfolio cost-effectiveness statement; (2) application summary tables with forecast budgets and savings by sector and program/intervention; and (3) incorporation of reductions and/or increases in program or sector budgets.

The following appendices meet the requirements of D.14-10-046:

- Appendix A: Budget Request Filing Summary Tables
- Appendix B: Budget and Savings Placemat Tables
- Appendix C: Savings Allocation and Funding Sources Tables

These appendices have been uploaded to the CEDARS website and will be made available on <http://www.socalgas.com/regulatory/R13-11-005.shtml>.

Compliance Items

The following are compliance requirements not addressed in Appendices A through C:

Program Funding Levels

Per the direction provided in in the Clarifications on Annual Budget Filings for Program Year 2017 memo issued by the Energy Division, “total portfolio budgets should match authorizations approved in D.14-10-046.”⁵ Figure 7 of D.14-10-046 lists the authorized SoCalGas budgets by program area. Table 1 below shows the authorized budgets included in Figure 7, along with the budget levels submitted herein for 2017 program implementation.

As was the case for the SoCalGas 2015 program year budget request approved in D.14-10-046, the 2017 funding request does not include the program budget for the SoCalGas Statewide Marketing, Education & Outreach (ME&O) program, nor the 2017 program budget for the Statewide Financing Pilots. The program year 2017 budgets for these programs were approved in D.13-12-038 and D.15-06-008, respectively.

The Southern California Regional Energy Network (SoCalREN) is submitting its own

³ D.14-10-046, p. 167.

⁴ D.15-10-028, p. 56.

⁵ Memorandum from Katie Wu to California Energy Efficiency Program Administrator Regulatory Staff, Clarifications on Annual Budget Filings for Program Year 2017, August 19, 2016, p. 1.

Advice Letter to implement its programs and associated budget.⁶ The SoCalREN budget shown in Table 1 reflects the funds originally authorized under D.14-10-046.

Table 1: 2017 EE Portfolio Budget

<u>Program Area</u>	<u>Total Funds</u> (\$000,s)
Residential	\$ 19,579
Commercial	\$ 11,812
Industrial	\$ 11,173
Agricultural	\$ 3,164
Codes and Standards	\$ 843
Financing	\$ 2,264
Subtotal Statewide Resource programs	\$ 48,835
Third Party Programs	\$ 16,376
State and Local Government Partnerships	\$ 4,846
Subtotal Other Resource programs	\$ 21,222
Emerging Technologies	\$ 1,272
Workforce, Education, and Training	\$ 3,129
Marketing, Education, and Outreach	N/A
Integrated Demand Side Management	\$ 582
Others	\$ 978
Subtotal Statewide Non-Resource programs	\$ 5,961
SoCalREN	\$ 4,337
Total All Programs	\$ 80,355
Evaluation, Measurement, and Verification	\$ 3,348
Grand Total	\$ 83,703

Notes:

1. Minor difference exist by program area due to rounding
2. Table does not include SW ME&O program funds authorized in D.13-13-044
3. Table does not include SW Financing Pilots program funds authorized in D.13-09-044

Additional program level budget detail is provided in Appendix B on the CEDARS website.

⁶ SoCalGas requests that the SoCalREN Advice Letter should be used as the source of information to reflect the SoCalREN 2017 energy efficiency portfolio/compliance filing.

SoCalGas Portfolio Energy Savings Goals, Cost-Effectiveness, and Budget Caps/Targets

SoCalGas provides its Energy Savings Goals and Portfolio Cost-Effectiveness (Table 2), and Budget and Budget Caps/Targets (Table 3) below:

Table 2: 2017 EE Portfolio Energy Savings Goals and Portfolio Cost-Effectiveness

With Codes & Standards

	Goal	Cost-Effectiveness	
	(Therms)	TRC	PAC
2017 Budget Filing Targets	37,932,948	1.47	3.29
D.15-10-028	30,300,000		
% Forecast of Goal	125%		

Without Codes & Standards

	Goal	Cost-Effectiveness	
	(Therms)	TRC	PAC
2017 Budget Filing Targets	24,059,773	1.17	1.50
D.15-10-028	18,100,000		
% Forecast of Goal	133%		

The SoCalGas Total Resource Cost (TRC) and Program Administrator Cost (PAC) results reflect the inclusion of the following inputs:

- Uses the 2011 version of the avoided cost calculator (currently available in the Cost-Effectiveness Tool) as clarified in the memo issued by the Energy Division to Program Administrator Regulatory staff on August 19, 2016.⁷
- A 5% market effects adjustment applied to the portfolio as directed by D.12-11-015, OP 37.
- General Rate Case (GRC) loaders associated with the EE program labor as directed by D.12-11-015, OP 39.⁸
- A projected shareholder incentive amount associated with the approved portfolio budget and projected therm savings activity. This assumption conforms to the

⁷ Memorandum from Katie Wu to California Energy Efficiency Program Administrator Regulatory Staff, Clarifications on Annual Budget Filings for Program Year 2017, August 19, 2016, p. 2.

⁸ On January 11, 2012, Energy Division conveyed ALJ Fitch's direction that the GRC costs are to be included in calculating the prospective portfolio budget administration cap.

methodology adopted in the Efficiency Savings and Performance Incentive (ESPI) Mechanism in D.13-09-023.

Table 3: 2017 EE Portfolio Budget and Budget Caps/Targets

	<u>Budgets</u>					<u>Total Budget</u>
	<u>Admin</u>	<u>Marketing</u>	<u>Direct</u>	<u>Incentives</u>	<u>EM&V</u>	
2017 EE Budget	\$8,385,134	\$5,058,618	\$31,475,625	\$31,099,194	\$3,347,927	\$79,366,499
GRC Labor Loaders	\$4,674,254	\$154,609	\$924,257	\$0	\$0	\$5,753,119
OBF Loan Pool						\$0
New Financing Pilots	\$637,254	\$682,280	\$1,597,076	\$2,217,201		\$5,133,811
Statewide ME&O		\$2,002,034				\$2,002,034
Total EE Funding						\$92,255,463
SoCalREN						\$4,337,000
Total EE Funding w/SoCalREN						\$96,592,463
Parameter Type	<u>Cap</u>	<u>Target</u>	<u>Target</u>		<u>Budget</u>	
Cap / Target Level	\$8,937,150	\$5,058,618	\$19,377,727	\$31,099,194	\$3,347,927	
Total Budget for Calculation	\$92,255,463	\$92,255,463	\$92,255,463	\$92,255,463	\$83,703,499	
Cap / Target Percent	9.7%	5.5%	21.0%	33.7%	4.0%	
Cap / Targets	10%	6%	20%	60%	4%	

Pursuant to OP 13 of D.09-09-047, the Commission determined that administrative costs are limited to 10% of the total energy efficiency budget, and ME&O costs have a budget target of 6% of the adopted portfolio budget. Additionally, non-incentive direct implementation costs have a budget target of 20% of the total budget, and Evaluation, Measurement and Verification (EM&V) funding is set at 4% of the authorized budget level. SoCalGas has calculated its portfolio caps and targets for its 2017 portfolio and included them in Table 3 above.

SoCalGas notes the following assumptions:

- Funding for the SoCalGas On-Bill Financing Program loan pool recovered in gas transportation rates is included, but does not impact the calculations because the adopted level for 2017 is zero.
- Pursuant to D.13-12-038, the Statewide ME&O program costs are excluded from the marketing budget target.
- According to the direction contained in PG&E's Advice Letter 3356-G/4176-E, SoCalGas excluded those program costs identified by Energy Division to be exempt from the cap and target calculation.
- D.14-10-046, as corrected by D.15-01-002, adopted a SoCalGas EM&V budget of \$3,347,927, which is 4% of the total budget.

SoCalGas will report the status of its budget caps and targets based on actual expenditures in its quarterly reports submitted through the Commission's California Energy Efficiency Statistics (EEStats) website.

New Programs

The following programs have been submitted by SoCalGas to the Commission for approval in Advice Letter 5003-A as part of its Assembly Bill (AB) 793 program implementation offerings.⁹ SoCalGas expects to launch these programs by January 1, 2017 and includes their requested budget herein. Additional program level budget detail is provided in Appendix B.

SCG3809 Commercial Energy Management Technology Lodging (CEMTL) Program

The CEMTL program is an energy management system retrofit program that addresses incorporating energy management technologies (EMTs) within the commercial hospitality (hotel and motel) segment. Specifically, the program will provide incentives for the integration of EMTs and target owners of existing medium-sized commercial lodging facilities buildings within the SoCalGas service territory. The CEMTL program will be implemented in partnership with an electric utility, thus allowing for the CEMTL Program to monitor both natural gas and electric savings.

SCG3810 Residential Energy Management Technology Solution (REMETS) Program

The REMETS program is a bundled measure deemed rebate program that will provide incentives to single family residential customers for integrating energy management technologies in their homes and will emphasize data access by proactively providing energy usage information to residential consumers through some form of mobile or web application. Specifically, the program will be implemented with electric and water utilities to provide incentives for the incorporation of energy management technologies for gas, electric and water measures, thus capturing a multi-measure comprehensive whole home approach. The REMETS program will target owners of existing single family homes within the SoCalGas service territory.

Competitively-Bid Portfolio Programs to Third Party Vendors

SoCalGas' proposed 2017 budget in Table 1 also includes \$21.3 million for competitively-bid third party implemented programs, which includes local third party EE programs as well as third parties who implement SoCalGas' statewide EE programs. This constitutes 27% of the SoCalGas' total portfolio budget, which exceeds the Commission's 20% requirement for competitively-bid programs.

⁹ AL 5003, dated August 1, 2016, requested approval of SoCalGas' proposed implementation plan to meet the legislative mandates in Assembly Bill (AB) 793.

2017 EE Revenue Requirement

SoCalGas plans to return \$11.3 million in unspent funds to ratepayers by reducing the 2017 EE revenue requirement. Specifically, \$8.77 million of the unspent funds are from the 2010-2012 program cycle and \$2.53 million are unspent funds from the current program cycle (as of December 2015). Additional detail is provided in Appendices B and C.

Changes to the Advice Letter

The following updates have been incorporated into the supplemental filing:

1. Tables related to 2013-2015 unspent and committed funds were updated based on SoCalREN's Supplemental Advice Letter.
2. Revenue and rate collection and funding source tables were updated to reflect SoCalREN's Supplemental Advice Letter.
3. The units for the budget provided in Table 1 were corrected.
4. Minor corrections to typographical errors were incorporated.
5. Energy Savings Assistance (ESA) Program savings will be added to the CEDARS online filing module but there are no changes to the tables as the savings are already included.

Protests

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 of this Advice Letter, which is November 28, 2016. 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
Attn: Tariff Unit
505 Van Ness Avenue
San Francisco, CA 94102

Copies of the protest should also be sent via e-mail to the Energy Division Tariff Unit (EDTariffUnit@cpuc.ca.gov). A copy of the protest should also be sent via both mail and facsimile to the address shown below on the same date it is mailed or delivered to the Commission.

Attn: Sid Newsom
Tariff Manager - GT14D6
555 West Fifth Street
Los Angeles, CA 90013-1011
Facsimile No. (213) 244-4957
E-mail: snewsom@SempraUtilities.com

Effective Date

SoCalGas believes that this Advice Letter is subject to Energy Division disposition and should be classified as Tier 2 (effective after staff approval) pursuant to General Order (GO) 96-B. This filing is consistent with D.09-09-047. Therefore, SoCalGas respectfully requests that this filing be approved on October 3, 2016, which is the date requested on Advice No. 5023.

Notice

A copy of this Advice Letter is being sent to SoCalGas' GO 96-B service list and the Commission's service lists for R.13-11-005. Address change requests to the GO 96-B should be directed by electronic mail to tariffs@socalgas.com or call 213 244 3387. For changes to all other service lists, please contact the Commission's Process Office at 415-703-2021 or by electronic mail at Process_Office@cpuc.ca.gov.

Ronald van der Leeden
Director – Regulatory Affairs

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 904G)**

Utility type:

ELC

GAS

PLC

HEAT

WATER

Contact Person: Sid Newsom

Phone #: (213) 244-2846

E-mail: SNewsom@semprautilities.com

EXPLANATION OF UTILITY TYPE

ELC = Electric

GAS = Gas

PLC = Pipeline

HEAT = Heat

WATER = Water

(Date Filed/ Received Stamp by CPUC)

Advice Letter (AL) #: 5023-A

Subject of AL: Supplement - Southern California Gas Company Request for Approval of Annual Energy Efficiency Budget Filing for Program Year 2017

Keywords (choose from CPUC listing): Energy Efficiency

AL filing type: Monthly Quarterly Annual One-Time Other

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

D.15-10-028

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: 10/3/16

No. of tariff sheets: 0

Estimated system annual revenue effect (%): N/A

Estimated system average rate effect (%): N/A

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: N/A

Service affected and changes proposed¹: N/A

Pending advice letters that revise the same tariff sheets: N/A

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
EDTariffUnit@cpuc.ca.gov**

**Southern California Gas Company
Attention: Sid Newsom
555 West 5th Street, GT14D6
Los Angeles, CA 90013-1011
SNewsom@semprautilities.com
Tariffs@socalgas.com**

¹ Discuss in AL if more space is needed.

APPENDIX A

Advice No. 5023-A

Budget Request Filing Summary Tables

Table 1.1 GROSS Annual Savings Impacts by Year

	2015 Claim			2016 Forecast			2017 Forecast		
	Total	CPUC Goal	% of 2015 Goal	Total	CPUC Goal	% of 2016 Goal	Total	CPUC Goal	% of 2017 Goal
Energy Savings (Gross GWh)	13.5			3.0			3.6		
Demand Reduction (Gross MW)	6.7			1.4			2.1		
Gas Savings (Gross MMTh)	25.5	25.3	101%	37.7	29.1	130%	37.9	30.3	125%

[1] Codes & Standards and Low Income ESAP Savings are included.

[2] 2017 EE goals were adopted in D.15-10-028.

Table 1.2 - 2017 Total Requested Budget and Projected Gross Portfolio Savings Impacts By Sector and End Use

Total Portfolio	Budget (millions) ¹		Energy Savings (Gross GWh)		Demand Reduction (Gross MW)		Gas Savings (Gross MMTh) ⁵	
	Total	% of Total	Total	% of Total	Total	% of Total	Total	% of Total
Residential	\$ 28.89	45%	3.53	99%	2.08	100%	3.86	10%
AppPlug	\$ 1.54	2%	1.52	43%	0.63	30%	0.21	1%
BldgEnv	\$ 0.67	1%	0.24	7%	0.19	9%	0.09	0%
HVAC	\$ 1.97	3%	1.12	31%	1.19	57%	0.26	1%
Lighting	\$ -	0%	-	0%	-	0%	-	0%
Recreate/Swim Pools	\$ 0.09	0%	-	0%	-	0%	0.01	0%
Water Heating	\$ 17.72	27%	0.65	18%	0.07	3%	2.37	6%
Whole Building	\$ 6.90	11%	-	0%	-	0%	0.92	2%
Nonresidential	\$ 29.94	46%	0.04	1%	0.00	0%	18.05	48%
AppPlug	\$ 0.64	1%	-	0%	-	0%	0.39	1%
BldgEnv	\$ 0.74	1%	0.16	4%	-	0%	0.44	1%
CompAir	\$ -	0%	-	0%	-	0%	-	0%
ComRefrig	\$ -	0%	-	0%	-	0%	-	0%
FoodServ	\$ 2.06	3%	-	0%	-	0%	1.24	3%
HVAC	\$ 1.92	3%	(0.09)	-3%	-	0%	1.16	3%
Irrigate	\$ -	0%	-	0%	-	0%	-	0%
Lighting	\$ -	0%	-	0%	-	0%	-	0%
Office	\$ -	0%	-	0%	-	0%	-	0%
ProcDist	\$ -	0%	-	0%	-	0%	-	0%
ProcHeat	\$ 18.69	29%	-	0%	-	0%	11.27	30%
ProcRefrig	\$ -	0%	-	0%	-	0%	-	0%
Recreate/Swim Pools	\$ 0.29	0%	-	0%	-	0%	0.18	0%
Service & Retro Comm	\$ 0.18	0%	-	0%	-	0%	0.11	0%
Water Heating	\$ 4.45	7%	(0.03)	-1%	0.00	0%	2.68	7%
Whole Building	\$ 0.97	2%	-	0%	-	0%	0.59	2%
Government Partnerships ²	\$ 4.85	8%	-	0%	-	0%	-	0%
Low Income Energy Efficiency	N/A	N/A	-	0%	-	0%	2.14	6%
Codes & Standards	\$ 0.84	1%	-	0%	-	0%	13.87	37%
Total	\$ 64.51		3.57		2.08		37.93	
CPUC 2017 Goal (including C&S)							30.30	

[1] The total resource program budget by market sector is the sum of all administrative, marketing and direct implementation incentive and non-incentive costs included in the 2017 budget request. Resource cross cutting core and third party programs are allocated to the appropriate market sector where energy savings are expected to be realized.

[2] SoCalGas' Local Government and Institutional Partnership programs are non-resource programs and are not included above. Projects and savings are funneled through SoCalGas' core programs.

Table 1.3 - 2017 Requested Budget and Projected Savings Impacts of Resource Programs by Market Sector

Market Sector	Budget (millions) ¹	% of Total	Energy Savings (Gross GWh)	% of Total	Demand Reduction (Gross MW)	% of Total	Gas Savings (Gross MMTh) ³	% of Total
Residential	\$ 28.89	45%	3.48	98%	2.07	100%	3.82	10%
Commercial	\$ 15.87	25%	(0.06)	-2%	0.01	0%	6.04	16%
Industrial	\$ 10.98	17%	(0.01)	0%	-	0%	10.19	27%
Agricultural	\$ 3.09	5%	0.16	4%	-	0%	1.87	5%
Government Partnerships ²	\$ 4.85	8%	-	0%	-	0%	-	0%
Low Income Energy Efficiency	N/A	N/A	-	0%	-	0%	2.14	6%
Codes & Standards	\$ 0.84	1%	-	0%	-	0%	13.87	37%
Total	\$ 64.51		3.57		2.08		37.93	

CPUC 2017 Goal (including C&S)							30.3	
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[1] The total resource program budget by market sector is the sum of all administrative, marketing and direct implementation incentive and non-incentive costs included in the 2017 budget request. Resource cross cutting core and third party programs are allocated to the appropriate market sector where energy savings are expected to be realized.
 [2] SoCalGas' Local Government and Institutional Partnership programs are non-resource programs and are not included above. Projects and savings are funneled through SoCalGas' core programs.

Table 2.1 -Bill Payer Impacts - Rates by Customer Class

	Electric Average Rate (Res and Non-Res) \$/kwh	Gas Average Rate (Res and Non-Res) \$/therm	Total Average Bill Savings by Year (\$)	Total Average Lifecycle Bill Savings (\$)
2013	\$ -	\$ 0.97	\$ 25,170,200	\$ 254,241,085
2014	\$ -	\$ 1.16	\$ 31,505,918	\$ 338,528,091
2015	\$ -	\$ 1.16	\$ 29,661,771	\$ 187,282,582
2016	\$ -	\$ 1.10	\$ 41,430,193	\$ 369,866,390
2017	\$ -	\$ 1.10	\$ 41,798,315	\$ 342,082,144

[1] Average first year gas bill savings is calculated by multiplying an average gas rate with first year gross therm energy savings.
 [2] Total Average Bill Savings by Year includes C&S and ESA Programs.
 [3] Total Average Lifecycle Bill Savings does not include C&S and ESA programs.
 [4] Average lifecycle gas bill savings is calculated by multiplying an average gas rate with lifecycle gross therm energy savings.
 [5] Forecasted savings for 2013-2015 savings are taken from the 2015 energy efficiency annual report.

Table 2.1a - Electric Bill Payer Impacts - Current and Proposed Revenues and Rates, Total and Energy Efficiency, by Customer Class

Customer Classes	2015 Total Electric Annual Revenue \$000	2015 Energy Efficiency Portion of Total Electric Annual Revenue \$000	2016 Total Electric Annual Revenue \$000	2016 Energy Efficiency Portion of Total Electric Annual Revenue \$000	2017 Proposed Electric Annual Revenue Change \$000	2017 Proposed Percentage Change In Electric Revenue and Rates (3)	2015 Electric Average Rate \$/kwh	2015 Energy Efficiency Portion of Electric Average Rate \$/kwh	2016 Electric Average Rate \$/kwh	2016 Energy Efficiency Portion of Electric Average Rate \$/kwh	2017 Proposed Electric Average Rate Change \$/kwh	2017 Proposed Percentage Change In Electric Revenue and Rates (3)

Table 2.1b - Gas Bill Payer Impacts - Current and Proposed Revenues and Rates, Total and Energy Efficiency, by Customer Class

Customer Classes	2015 Total Gas PPS Annual Revenue \$000	2015 Energy Efficiency Portion of Total Gas PPS Annual Revenue \$000	2016 Total Gas PPS Annual Revenue \$000	2016 Energy Efficiency Portion of Total Gas PPS Annual Revenue \$000	2017 Proposed Gas Annual PPS Revenue Change \$000	2017 Proposed Percentage Change In Gas Revenue and Rates (3)	2015 Gas Average Rate \$/kwh	2015 Energy Efficiency Portion of Gas Average Rate \$/kwh	2016 Gas Average Rate \$/kwh	2016 Energy Efficiency Portion of Gas Average Rate \$/kwh	2017 Proposed Gas Average Rate Change \$/kwh	2017 Proposed Percentage Change In Gas Revenue and Rates (3)
Residential	\$ 230,374	\$ 32,334	\$ 218,385	\$ 33,837	\$ 27,007.7	-20.2%	\$ 0.10738	\$ 0.01385	\$ 0.09955	\$ 0.01449	\$ (0.00293)	-1.7%
Core Commercial/Industrial	\$ 75,604	\$ 42,308	\$ 69,289	\$ 44,276	\$ 35,339.3	-20.2%	\$ 0.07784	\$ 0.04349	\$ 0.07127	\$ 0.04548	\$ (0.00918)	-7.4%
Gas Air Conditioning	\$ 88	\$ 61	\$ 84	\$ 64	\$ 50.8	-20.2%	\$ 0.10661	\$ 0.07377	\$ 0.10142	\$ 0.07720	\$ (0.01558)	-8.8%
Gas Engine	\$ 1,368	\$ 813	\$ 1,261	\$ 851	\$ 679.1	-20.2%	\$ 0.08154	\$ 0.04847	\$ 0.07518	\$ 0.05073	\$ (0.01024)	-7.8%
Non-Core Commercial/Industrial	\$ 56,155	\$ 6,254	\$ 43,188	\$ 6,544	\$ 5,223.6	-20.2%	\$ 0.03656	\$ 0.00407	\$ 0.02811	\$ 0.00426	\$ (0.00086)	-1.7%

[1] Proposed Change in Annual Revenue for Energy Efficiency programs as compared to current Energy Efficiency Revenue by customer class.
 [2] Represents the change in the amounts collected through the Public Purpose Program Surcharge for Energy Efficiency.
 [3] Proposed Change in the Energy Efficiency Component of the Public Purpose Program Surcharge by customer class.
 [4] Represents the % change in the Energy Efficiency component of the Public Purpose Program Surcharge.
 [5] Proposed revenue and rate changes compare to total revenues and rates effective January 1, 2016.
 [6] Values shown associated with proposed 2017 SoCalGas EE budget to be collected in rates only. Does not include statewide ME&O budget.

Table 2.2 - Budget and Cost Recovery by Funding Source

2017	
2017 EE Portfolio Budget ²	\$ 83,703,499
Unspent/Uncommitted EM&V Carryover Funds	\$ 1,170,000
Unspent/Uncommitted Program Carryover Funds	\$ 14,233,081
Total Funding Request for 2017 EE Portfolio	\$ 68,300,418

[1] Includes SoCalREN budget of \$4,337,000.

[2] The requested budget for PY2017 does not include the program budget for the SoCalGas Statewide Marketing, Education & Outreach (ME&O) program or the 2017 program budget for the Statewide Financing Pilots. The program year 2017 budgets for these programs were approved in D.13-12-038 and D.15-06-008, respectively.

Budget by Funding Source

2017 Authorized (Before Carryover)	2017 Budget	Allocation
Electric Procurement EE Funds		
Gas PPP Surcharge Funds	\$ 83,703,499	100%
Total Funds	\$ 83,703,499	

Revenue Requirement for Cost Recovery by Funding Source

2017 Authorized Funding in Rates (including 2015 carryover)	2017 Revenue Requirement	Allocation after Carryover adjustment
Electric Procurement EE Funds		
Gas PPP Surcharge Funds	\$ 68,300,418	100%
Total Funds	\$ 68,300,418	

Unspent/Uncommitted Carryover Funds (in positive \$ amonts)

Total Unspent/Uncommitted Funds	Electric			Gas	Total
	Electric PGC	Procurement	Total Electric		
2013-2015				\$ 6,650,373	\$ 6,650,373
2010-2012				\$ 8,752,709	\$ 8,752,709
Total Pre-2015				\$15,403,081	\$15,403,081

EM&V Unspent/Uncommitted Funds	Electric			Gas	Total
	Electric PGC	Procurement	Total Electric		
2013-2015				\$ -	\$ -
2010-2012 ¹				\$ 1,170,000	\$ 1,170,000
Total Pre-2015				\$ 1,170,000	\$ 1,170,000

Program Unspent/Uncommitted Funds	Electric			Gas	Total
	Electric PGC	Procurement	Total Electric		
2013-2015				\$ 6,650,373	\$ 6,650,373
2010-2012				\$ 7,582,709	\$ 7,582,709
Total Pre-2015				\$14,233,081	\$14,233,081

[1] EM&V unspent funds represents IOU funds only.

Table 3.1 - Cap & Targets

	<u>Budgets</u>					<u>Total Budget</u>
	<u>Admin</u>	<u>Marketing</u>	<u>Direct</u>	<u>Incentives</u>	<u>EM&V</u>	
2017 EE Budget	\$ 8,385,134	\$ 5,058,618	\$31,475,625	\$31,099,194	\$ 3,347,927	\$79,366,499
GRC Labor Loaders	\$ 4,674,254	\$ 154,609	\$ 924,257	\$ -	\$ -	\$ 5,753,119
OBF Loan Pool						
New Financing Pilots	\$ 637,254	\$ 682,280	\$ 1,597,076	\$ 2,217,201		\$ 5,133,811
Statewide ME&O		\$ 2,002,034				\$ 2,002,034
Total EE Funding						\$92,255,463
SoCalREN						\$ 4,337,000
Total EE Funding w/SoCalREN						\$96,592,463
Parameter Type	<u>Cap</u>	<u>Target</u>	<u>Target</u>		<u>Budget</u>	
Cap / Target Level	\$ 8,937,150	\$ 5,058,618	\$19,377,727	\$31,099,194	\$ 3,347,927	
Total Budget for Calculation	\$92,255,463	\$92,255,463	\$92,255,463	\$92,255,463	\$83,703,499	
Cap / Target Percent	10%	5%	21%	34%	4%	
Cap / Targets	10%	6%	20%	60%	4%	

APPENDIX B

Advice No. 5023-A

Budget and Savings Placemat Tables

Appendix B.3 – Budget, Spent, Unspent, Carryover Details

New/Existing Program #	Main Program Name / Sub-Program Name	2013-2015 Budget, Spent, Unspent and Carryover						2016 Budget, Fundshifts and Spending to Date				2017 Proposed Budget				Program Type	Market Sector	Resource or Non-Resource	Program Status	Utility Grouping
		2015 Authorized Budget	2015 Total with Commitments & Fundshifts	2015 Total Budget Spent	Pre-2013 Commitments Remaining as of 12/31/15	2013-2015 Unspent/Uncommitted Funds Returned to Ratepayers	2013-2015 Commitments as of 12/31/15	2016 Unspent/Uncommitted Funds Available for 2017 offset	2016 Authorized Budget	2016 Fundshifts	2016 Total Budget	2016 Budget Spent as of 06/30/2016	2017 Proposed Budget	2017 Offset From Pre-2013 Carryover (Col J)	2017 Funds Requested					
Residential Energy Efficiency Programs Total		19,579,342	24,825,014	26,844,221	331,975	-	5,345,572	-	19,579,342	-	19,579,342	-	19,579,342	-	19,579,342	Core - SW	Residential	Resource	Existing	Residential Programs
SCG3701	RES-Energy Advisor	757,885	1,421,361	153,132	252,632	-	132,798	-	757,885	-	757,885	-	757,885	-	757,885	Core - SW	Residential	Resource	Existing	Residential Programs
SCG3702	RES-Plug Load and Appliances	4,193,046	4,326,806	6,328,114	-	-	132,798	-	4,193,046	-	4,193,046	-	4,193,046	-	4,193,046	Core - SW	Residential	Resource	Existing	PLA
SCG3703	RES-Plug Load and Appliances - POS	2,287,108	5,400,070	2,824,814	-	-	1,219,282	-	2,287,108	-	2,287,108	-	2,287,108	-	2,287,108	Core - SW	Residential	Resource	Existing	PLA
SCG3704	RES-Weatherization	1,828,972	1,728,847	1,683,672	-	-	1,423,617	-	1,828,972	-	1,828,972	-	1,828,972	-	1,828,972	Core - SW	Residential	Resource	Existing	PLA / LIFE/ER
SCG3705	RES-Home Upgrade Program	6,767,345	4,867,345	7,033,701	-	-	-	-	6,767,345	-	6,767,345	-	6,767,345	-	6,767,345	Core - SW	Residential	Resource	Existing	Whole House
SCG3706	RES-Residential HVAC	1,409,054	2,552,157	18,558	-	-	1,143,103	-	1,409,054	-	1,409,054	-	1,409,054	-	1,409,054	Core - SW	Residential	Resource	Existing	HVAC
SCG3707	RES-Weatherization	2,835,928	3,574,598	3,661,638	80,143	-	3,674,010	-	2,835,928	-	2,835,928	-	2,835,928	-	2,835,928	Core - SW	Residential	Resource	Existing	New Construction
SCG3808	RES-HOPPS-CVHWBS Program	-	-	-	-	-	-	-	-	-	-	-	650,000	-	650,000	Core - SW	Residential	Resource	Existing	HOPPS
SCG3810	RES-AB793-REMTS Programs	-	-	-	-	-	-	-	-	-	-	-	363,000	-	363,000	Core - SW	Residential	Resource	New	AB793
Commercial Programs Total		10,737,344	13,717,778	9,562,313	173,000	1,080,422	2,980,421	2,655,442	10,737,344	-	10,737,344	-	10,737,344	-	10,737,344	Core - SW	Commercial	Resource	Existing	Commercial Programs
SCG3708	COM-Energy Advisor	516,008	603,508	498,213	-	-	693,203	-	516,008	-	516,008	-	516,008	-	516,008	Core - SW	Commercial	Resource	Existing	Commercial Programs
SCG3709	COM-DPE	200,329	251,699	410,114	-	-	51,370	-	200,329	-	200,329	-	200,329	-	200,329	Core - SW	Commercial	Resource	Existing	CEI
SCG3710	COM-Calculated Incentives	5,195,391	7,411,710	5,974,649	173,000	-	2,718,338	1,179,218	5,195,391	-	5,195,391	-	5,195,391	-	5,195,391	Core - SW	Commercial	Resource	Existing	Calculated Incentives
SCG3711	COM-Deemed Incentives	4,497,331	5,122,674	4,987,613	-	-	125,295	-	4,497,331	-	4,497,331	-	4,497,331	-	4,497,331	Core - SW	Commercial	Resource	Existing	Deemed Incentives
SCG3712	COM-NonRes HVAC	328,282	328,282	22,631	-	-	712,484	-	328,282	-	328,282	-	328,282	-	328,282	Core - SW	Commercial	Resource	Existing	HVAC
SCG3805	COM-Weatherization Program	-	-	-	-	-	-	-	-	-	-	-	1,750,000	-	1,750,000	Core - SW	Commercial	Resource	Existing	Direct Install
SCG3807	COM-HOPPS-CRR Program	-	-	-	-	-	-	-	-	-	-	-	490,000	-	490,000	Core - SW	Commercial	Resource	Existing	HOPPS
SCG3809	COM-AB793-CEMTL Program	-	-	-	-	-	-	-	-	-	-	-	596,000	-	596,000	Core - SW	Commercial	Resource	New	AB793
Industrial Programs Total		11,173,217	25,628,955	7,867,956	665,187	870,670	14,995,738	2,774,295	11,173,217	(2,162,824)	9,010,393	2,462,939	11,573,217	2,774,295	8,808,922	Core - SW	Industrial	Resource	Existing	Industrial Programs
SCG3713	IND-CEI	815,740	815,740	124,649	-	-	870,670	45,932	815,740	-	815,740	-	815,740	-	815,740	Core - SW	Industrial	Resource	Existing	Energy Advisor
SCG3714	IND-CEI	324,017	686,540	516,353	-	-	362,532	-	324,017	-	324,017	-	324,017	-	324,017	Core - SW	Industrial	Resource	Existing	CEI
SCG3715	IND-Calculated Incentives	9,184,880	23,297,338	6,024,833	665,187	-	14,622,456	1,903,625	9,184,880	(2,162,824)	7,021,956	1,991,702	9,184,880	1,903,625	7,281,255	Core - SW	Industrial	Resource	Existing	Calculated Incentives
SCG3716	IND-Deemed Incentives	1,008,790	1,008,790	727,950	-	-	1,008,790	-	1,008,790	-	1,008,790	-	1,008,790	-	1,008,790	Core - SW	Industrial	Resource	Existing	Deemed Incentives
Agricultural Programs Total		4,238,506	8,238,140	919,290	186,501	4,000,642	1,296,141	4,238,506	4,238,506	1,600,412	3,163,506	1,296,141	1,867,366	-	1,867,366	Core - SW	Agricultural	Resource	Existing	Agricultural Programs
SCG3717	AG-Energy Advisor	39,703	84,457	25,585	-	-	44,754	-	39,703	-	39,703	-	39,703	-	39,703	Core - SW	Agricultural	Resource	Existing	Energy Advisor
SCG3718	AG-CEI	199,200	199,200	199,200	-	-	199,200	-	199,200	-	199,200	-	199,200	-	199,200	Core - SW	Agricultural	Resource	Existing	CEI
SCG3719	AG-Calculated Incentives	3,663,775	7,570,605	330,505	-	-	3,596,830	1,106,580	3,663,775	1,321,219	2,342,556	1,106,580	1,478,195	-	1,478,195	Core - SW	Agricultural	Resource	Existing	Calculated Incentives
SCG3720	AG-Deemed Incentives	502,829	502,829	520,505	-	-	186,501	-	502,829	-	502,829	-	502,829	-	502,829	Core - SW	Agricultural	Resource	Existing	Deemed Incentives
Emerging Technologies Programs Total		1,272,338	2,322,344	1,083,180	-	-	510,010	163,960	1,272,338	-	1,272,338	163,960	1,108,378	-	1,108,378	Core - SW	Cross Cutting	Resource	Existing	Emerging Technology Programs
SCG3721	ET-Energy Assessment Support	24,576	24,576	24,576	-	-	24,015	561	24,576	-	24,576	-	24,576	-	24,576	Core - SW	Cross Cutting	Resource	Existing	Emerging Technology Programs
SCG3722	ET-Technology Assessment Support	508,588	1,544,621	687,183	-	-	41,098	163,960	508,588	-	508,588	-	508,588	-	508,588	Core - SW	Cross Cutting	Resource	Existing	Emerging Technology Programs
SCG3723	ET-Technology Introduction Support	700,172	(70,669)	215,402	-	-	228,999	-	700,172	-	700,172	-	700,172	-	700,172	Core - SW	Cross Cutting	Resource	Existing	Emerging Technology Programs
SCG3724	ET-Water MFR Pilot	-	-	-	-	-	-	-	-	-	-	-	19,000	-	19,000	Core - SW	Cross Cutting	Resource	New	ET
Codes & Standards Programs Total		842,591	1,889,500	552,484	-	-	1,046,999	103,109	842,591	359,081	842,591	103,109	739,482	-	739,482	Core - SW	Cross Cutting	Resource	Existing	Codes and Standards
SCG3724	C&S-Building Codes & Compliance Advocacy	209,995	284,211	228,133	-	-	54,276	-	209,995	-	209,995	-	209,995	-	209,995	Core - SW	Cross Cutting	Resource	Existing	Codes and Standards
SCG3725	C&S-Compliance Standards	167,486	486,512	92,671	-	-	90,464	167,486	167,486	-	167,486	-	167,486	-	167,486	Core - SW	Cross Cutting	Resource	Existing	Codes and Standards
SCG3726	C&S-Compliance Enhancement	251,207	452,555	163,320	-	-	201,348	103,109	251,207	-	251,207	-	103,109	-	148,098	Core - SW	Cross Cutting	Resource	Existing	Codes and Standards
SCG3727	C&S-Research Codes	85,374	284,871	22,409	-	-	189,443	-	85,374	-	85,374	-	85,374	-	85,374	Core - SW	Cross Cutting	Resource	Existing	Codes and Standards
SCG3728	C&S-Code Coordination	129,833	409,457	129,833	-	-	129,833	-	129,833	-	129,833	-	129,833	-	129,833	Core - SW	Cross Cutting	Resource	Existing	Codes and Standards
Workforce Education & Training Programs Total		3,128,997	3,567,970	2,901,274	-	-	438,973	121,510	3,128,997	1,183,157	3,128,997	121,510	3,007,487	-	3,007,487	Core - SW	Cross Cutting	Resource	Existing	WEAT Programs
SCG3729	WEAT-Strategic Planning	2,548,697	2,718,916	2,482,481	-	-	46,218	-	2,548,697	-	2,548,697	-	2,548,697	-	2,548,697	Core - SW	Cross Cutting	Resource	Existing	WEAT Programs
SCG3730	WEAT-CEI	428,962	428,962	428,962	-	-	428,962	30,588	428,962	-	428,962	-	428,962	-	428,962	Core - SW	Cross Cutting	Resource	Existing	WEAT Programs
SCG3731	WEAT-Strategic Planning	150,348	267,906	12,042	-	-	242,558	100,342	150,348	-	150,348	-	100,342	-	49,006	Core - SW	Cross Cutting	Resource	Existing	WEAT Programs
Statewide DSM Coordination & Integration Program Total		581,750	581,750	305,327	-	-	390,720	-	581,750	460,691	581,750	460,691	121,059	-	121,059	Core - SW	Cross Cutting	Resource	Existing	DSM Integration Programs
SCG3734	DSM-CEI	307,150	307,150	307,150	-	-	307,150	-	307,150	-	307,150	-	307,150	-	307,150	Core - SW	Cross Cutting	Resource	Existing	DSM Integration Programs
Financing Programs Total		2,264,324	14,168,750	3,016,404	-	-	11,904,426	470,871	2,264,324	226,119	2,264,324	470,871	1,793,453	-	1,793,453	Core - SW	Cross Cutting	Resource	Existing	Financing Programs
SCG3735	FIN-On-Bill Financing	878,579	2,552,784	247,700	-	-	1,674,204	470,871	878,579	-	878,579	-	470,871	-	407,708	Core - SW	Cross Cutting	Resource	Existing	Financing Programs
SCG3736	FIN-Advanced Financial Structuring	1,385,745	4,533,386	837,307	-	-	2,991,260	-	1,385,745	-	1,385,745	-	1,385,745	-	1,385,745	Core - SW	Cross Cutting	Resource	Existing	Financing Programs
SCG3737	FIN-New Financing Offerings	1,379,800	7,099,385	1,331,407	-	-	3,833,000	-	1,379,800	-	1,379,800	-	1,379,800	-	1,379,800	Core - SW	Cross Cutting	Resource	Existing	Financing Programs
SCG3738	FIN-California Hub for EE Financing	-	162,687	792,505	-	-	162,687	-	-	-	-	-	-	-	-	Core - SW	Cross Cutting	Resource	Existing	Financing Programs
Institutional Partnership Programs Total		1																		

APPENDIX C

Advice No. 5023-A

Savings Allocation and Funding Sources Tables

Table 1. Commission Adopted and Proposed Energy Savings Goals.

Southern California Gas Company						
2013-15 Electric Goals	2010-12 Annualized ¹	2013 ²	2014 ²	2015 ³	2016 ⁴	2017 ⁴
Annual electricity savings (GWh/yr)						
IOU program targets						
Codes and Standards Advocacy						
Total Annual Targets						
Annual peak savings (MW)						
IOU program targets						
Codes and Standards Advocacy						
Total Peak Savings Targets						
Annual natural gas savings with interactive effects (MMTherms/yr)						
IOU program targets	30.2	24.0	22.3	21.3	17.3	18.1
Codes and Standards Advocacy		0.1	0.9	4.0	11.7	12.2
Total Gas Targets	30.2	24.1	23.2	25.3	29.1	30.3

[1] 2010-12 annualized goals are the sum of the adopted CPUC goals in D.09-09-047 Table 2 for the three years, divided by three, including C&S.

[2] 2013 and 2014 IOU savings targets approved in Table 5 of D.12-11-015.

[3] 2015 IOU savings targets approved in Table 1 of D.14-10-046.

[4] 2016 and 2017 IOU savings targets approved in Figure 1 of D.15-10-028.

Table 2. Total 2017 Requested and 2010-2015 Authorized Budgets (\$000).

Category (2010-16 Authorized ¹ and 2017 Request)	Electric Demand Response Funds	Electric Energy Efficiency Funds	Natural Gas Public Purpose Funds	Total Energy Efficiency Funds
2010-12 Annualized Programs			\$ 91,200	\$ 91,200
2010-12 Annualized EM&V			\$ 3,800	\$ 3,800
2010-2012 Annualized Total			\$ 95,000	\$ 95,000
2013-2015 Annualized Program Funds - Utility			\$ 79,470	\$ 79,470
2013-2015 Annualized Program Funds - REN			\$ 4,390	\$ 4,390
2013-2015 Annualized Program Funds - CCA			\$ -	\$ -
2013-2015 Annualized EM&V			\$ 3,550	\$ 3,550
2013-2015 Total Annualized Portfolio			\$ 87,410	\$ 87,410
2016 Program Funds - Utility			\$ 76,019	\$ 76,019
2016 Program Funds - REN			\$ 4,337	\$ 4,337
2016 Program Funds - CCA			\$ -	\$ -
2016 EM&V			\$ 3,348	\$ 3,348
2016 Annualized Total			\$ 83,704	\$ 83,704
2017 Requested Program Funds - Utility			\$ 76,019	\$ 76,019
2017 Requested Program Funds - REN			\$ 4,337	\$ 4,337
2017 Requested Program Funds - CCA			\$ -	\$ -
2017 Requested EM&V			\$ 3,348	\$ 3,348
2017 Total Portfolio Request			\$ 83,704	\$ 83,704

[1] Authorized budget excludes reductions from past unspent funds or carryover and is consistent with funding approved in D.09-09-047, D.12-11-015, D.14-10-046, and D.15-10-028.

Table 3. Past and Requested Energy Efficiency Budgets (\$000's)

Annualized Budget by Program Area (\$000)	2013-2015 Authorized Budget Annualized	2013-15 Spent Annualized	Commitments from in 2013-15 carryover to 2016 ¹	2016 Budget (including Commitments from 13-15) ²	2017 request
Statewide Resource Programs					
Residential	\$ 19,570	\$ 17,582	\$ 5,346	\$ 24,925	\$ 19,579
Commercial	\$ 9,671	\$ 8,317	\$ 2,980	\$ 13,718	\$ 11,812
Industrial	\$ 13,459	\$ 7,854	\$ 14,996	\$ 26,169	\$ 11,173
Agricultural	\$ 2,998	\$ 1,539	\$ 4,001	\$ 8,239	\$ 3,164
Codes and Standards	\$ 839	\$ 490	\$ 1,047	\$ 1,890	\$ 843
Financing	\$ 5,820	\$ 1,840	\$ 11,904	\$ 14,169	\$ 2,264
Subtotal Statewide Resource Programs	\$ 52,357	\$ 37,622	\$ 40,274	\$ 89,110	\$ 48,835
Other Resource Programs					
Third Party Programs (competitively bid)	\$ 13,954	\$ 10,675	\$ 8,193	\$ 21,822	\$ 13,319
Local Government Partnerships	\$ -	\$ -	\$ -	\$ -	\$ -
Subtotal Other Resource Programs	\$ 13,954	\$ 10,675	\$ 8,193	\$ 21,822	\$ 13,319
Statewide Non-Resource Programs					
Third Party Programs (competitively bid)	\$ 2,771	\$ 3,120	\$ 597	\$ 3,344	\$ 3,057
Local Government Partnerships	\$ 4,790	\$ 2,619	\$ 6,510	\$ 11,356	\$ 4,846
Emerging Technologies	\$ 1,263	\$ 1,268	\$ 510	\$ 1,782	\$ 1,272
Workforce, Education, and Training	\$ 3,095	\$ 2,948	\$ 439	\$ 3,568	\$ 3,129
Integrated Demand Side Management	\$ 411	\$ 271	\$ -	\$ 582	\$ 582
Other (explain each entry in text)	\$ -	\$ -	\$ -	\$ -	\$ -
Subtotal Statewide Non-Resource Programs	\$ 12,330	\$ 10,226	\$ 8,056	\$ 20,632	\$ 12,886
Subtotal Utility Programs	\$ 78,641	\$ 58,523	\$ 56,523	\$ 131,564	\$ 75,040
Non-Utility Programs					
CRM Overhead	\$ 825	\$ 1,288	\$ -	\$ 978	\$ 978
REN	\$ 4,388	\$ 949	\$ 10,319	\$ 14,656	\$ 4,337
Other					
Subtotal Non-Utility Programs	\$ 5,213	\$ 2,237	\$ 10,319	\$ 15,634	\$ 5,315
TOTAL NEW BUDGET REQUEST	\$ 83,854	\$ 60,760	\$ 66,842	\$ 147,198	\$ 80,355
Evaluation, Measurement, and Verification	\$ 3,550	\$ 1,092	\$ 7,372	\$ 10,720	\$ 3,348
TOTAL ALL PROGRAMS PLUS ME&O	\$ 87,404	\$ 61,852	\$ 74,214	\$ 157,918	\$ 83,703
Marketing, Education, and Outreach	\$ 1,335	\$ 1,182	\$ 458	\$ 2,460	\$ 2,002
GRAND TOTAL 2015 PORTFOLIO	\$ 88,739	\$ 63,034	\$ 74,672	\$ 160,378	\$ 85,705

[1] Committed funds carryover to 2016 are funds encumbered as of December 2015 that are considered operating budget for 2016.

[2] 2016 budget includes 2016 authorized budget plus commitments from 2012-2013 identified on column "E".

Table 4. Unspent Energy Efficiency Program Funding

Unspent/Uncommitted Offsets to 2017 Revenue Requirements (\$000).				
Category	Electric Former PGC Funds	Electric Procurement Funds	Natural Gas Public Purpose Funds	Total
2010-2012 EM&V Funds ¹			\$ 1,170	\$ 1,170
2010-2012 Program Funds - Utility			\$ 7,583	\$ 7,583
2013-2015 EM&V Funds			\$ -	\$ -
2013-2015 Program Funds - Utility			\$ 2,528	\$ 2,528
2013-2015 Program Funds - REN			\$ 4,122	\$ 4,122
2013-2015 Program Funds - CCA			\$ -	\$ -
Total			\$ 15,403	\$ 15,403

[1] Unspent/uncommitted funds associated with SoCalGas' 2010-12 EM&V funds.

Table 4b. Committed Energy Efficiency Program Funding Not Yet Spent

Previous committed carryover funds not yet spent (\$000).				
Category	Electric Former PGC Funds	Electric Procurement Funds	Natural Gas Public Purpose Funds	Total
2010-2012 EM&V Funds ¹			\$ 455	\$ 455
2010-2012 Program Funds - Utility			\$ 1,193	\$ 1,193
2012 Program Funds - CCA			\$ -	\$ -
2013-2015 EM&V Funds			\$ 7,372	\$ 7,372
2013-2015 Program Funds - Utility			\$ 56,522	\$ 56,522
2013-2015 Program Funds - REN			\$ 6,197	\$ 6,197
2013-2015 Program Funds - CCA			\$ -	\$ -
Total			\$ 71,739	\$ 71,739

[1] Committed funds associated with Energy Divisions' 2010-12 EM&V funds.

PA Name: Southern California Gas Company

Budget Year: 2017

Table 5. 2013 Authorized and Spent/Unspent Detail

Authorized, spent and unspent program funds (excludes EM & V) (\$000) Category	Electric Procurement Funds	Natural Gas Public Purpose Funds	Total
2013-15 Annualized Authorized Program Budget		\$ 83,854	\$ 83,854
2013-15 Actual Spent		\$ 182,277	\$ 182,277
2013-15 Unspent			
2013-15 Committed funds		\$ 62,719	\$ 62,719
2013-15 Unspent/uncommitted - estimated available for 2017		\$ 6,650	\$ 6,650

PA Name: Southern California Gas Company

Budget Year: 2017

Table 6.1 Estimated, Claimed and Evaluated Savings 2010-2017.

Category	Compliance Filing Forecast ¹			Claimed			Evaluated ²		MM Therm
	GWh	MW	MM Therm	GWh	MW	MM Therm	GWh	MW	
2010-12 Annualized	18.0	11.3	38.4	7.1	9.1	32.5			43.0
2013	6.8	3.7	27.3	3.5	2.2	23.1			
2014	6.8	3.7	27.4	11.4	4.1	24.0			
2015	6.3	3.6	26.5	13.5	6.7	16.4			
2016									
2017	3.6	2.1	24.1						

[1] Compliance Filing Forecast based on CPUC approved compliance filing savings estimates; may be adjusted for updated savings values. C&S savings are included as net for 2010-12 and excluded for 2013-17. Energy Savings Assistance savings are included in all years.

[2] Evaluated therms from 2010-2012 Energy Efficiency Annual Progress Evaluation Report published in March 2015.

Table 6.2 CPUC Authorized Goals

Year	CPUC Goals ¹		
	GWh	MW	MM Therm
2010-12 Annualized			30.2
2013			24.0
2014			22.3
2015			21.3
2016			17.3
2017			18.1

- [1] 2010-12 Annualized is the sum of the adopted CPUC goals in D. 09-09-047 Table 2 for the three years divided by three including C&S.
 [2] 2013 and 2014 are IOU savings targets approved in Table 5 of D. 12-11-015. Figure does not include C&S.
 [3] 2015 IOU savings targets approved in Table 1 of D.14-10-046. Figure does not include C&S.
 [4] 2016 and 2017 are IOU savings targets approved in Figure 1 of D.15-10-028. Figure does not include C&S.

Table 6.3 Comparison of Forecast and Claimed Savings to CPUC Authorized Goals

Category	Compliance Filing Forecast Compared to Goals			Claimed Savings Compared to Goals		
	GWh % of goal	MW % of goal	MM Therm % of goal	GWh % of goal	MW % of goal	MM Therm % of goal
2010-12 Annualized			127%			108%
2013			114%			96%
2014			123%			107%
2015			124%			77%
2016						
2017			133%			

Table 1.7 TRC Cost-Effectiveness Scenario Results^{1,2,3}

	2013-2015		
	Claimed	2016 Forecast	2017 Forecast
Resource Portfolio (less C&S and less ME)			1.62
Resource and Nonresource Portfolio (less C&S and less ME)			1.17
Portfolio with C&S, ME and ESPI^{4,5,6,7,8}	1.20		1.47

[1] Includes costs and savings associated with electric efficiency interactive effects.

[2] Does not include Emerging Technology Program, OBF revolving loan pool costs, or credit enhancements.

[3] Does not include Energy Savings Assistance program costs and benefits.

[4] 2017 forecast includes \$5,753,119 in overhead costs authorized in SoCalGas' General Rate Case.

[5] ME is Market Effects and refers to D.12-11-015 that adopted 5% spillover for resource programs.

[6] 2017 forecast includes estimated Energy Savings Performance Incentive payments of \$6,200,673.

[7] Includes costs but not benefits associated with the SoCalREN.

[8] Includes estimated costs associated with Statewide Marketing, Education & Outreach.

Table 1.7 PAC Cost-Effectiveness Scenario Results^{1,2,3}

	2013-2015		
	Claimed	2016 Forecast	2017 Forecast
Resource Portfolio (less C&S and less ME)			2.29
Resource and Nonresource Portfolio (less C&S and less ME)			1.47
Portfolio with C&S, ME and ESPI^{4,5,6,7,8}	2.22		3.29

[1] Includes costs and savings associated with electric efficiency interactive effects.

[2] Does not include Emerging Technology Program, OBF revolving loan pool costs, or credit enhancements.

[3] Does not include Energy Savings Assistance program costs and benefits.

[4] 2017 forecast includes \$5,753,119 in overhead costs authorized in SoCalGas' General Rate Case.

[5] ME is Market Effects and refers to D.12-11-015 that adopted 5% spillover for resource programs.

[6] 2017 forecast includes estimated Energy Savings Performance Incentive payments of \$6,200,673.

[7] Includes costs but not benefits associated with the SoCalREN.

[8] Includes estimated costs associated with Statewide Marketing, Education & Outreach.