

PUBLIC UTILITIES COMMISSION

505 VAN NESS AVENUE  
SAN FRANCISCO, CA 94102-3298



December 23, 2016

**Advice Letter 5024-G**

Ronald van der Leeden  
Director, Regulatory Affairs  
Southern California Gas  
555 W. Fifth Street, GT14D6  
Los Angeles, CA 90013-1011

**SUBJECT: Energy Efficiency Incentive Award for Program Years (PY) 2014 and 2015**

Dear Mr. van der Leeden:

Advice Letter 5024-G is effective as of December 15, 2016, per Resolution E-4807 Ordering Paragraphs.

Sincerely,

A handwritten signature in cursive script that reads "Edward Randolph".

Edward Randolph  
Director, Energy Division



Ronald van der Leeden

Director  
Regulatory Affairs

555 W. Fifth Street, GT14D6  
Los Angeles, CA 90013-1011  
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September 1, 2016

Advice No. 5024  
(U 904 G)

Public Utilities Commission of the State of California

**Subject: Energy Efficiency Incentive Award for Program Years (PY) 2014 and 2015**

Southern California Gas Company (SoCalGas) hereby submits for approval by the California Public Utilities Commission (Commission) its PY 2014 and PY 2015 Energy Efficiency (EE) Incentive Mechanism award in the amount of \$4,048,696, included in Table 1 below. This filing is made in compliance with Decision (D.) 13-09-023, D.14-10-046, and D.15-10-028.

**Table 1: Energy Efficiency Incentive Award for PY 2014 & PY 2015**

Component	Award
2014 Ex-Post Savings	\$2,029,846
2014 Ex-Ante Savings True Up	\$221
2015 Ex-Ante Savings	\$1,024,615
2015 Ex-Ante Review Performance	\$600,299
2014 Ex-Ante Review Performance True Up	(\$2,572)
2015 Codes & Standards	\$59,009
2014 Codes & Standards True Up	\$0
2015 Non-Resource	\$337,278
2014 Non-Resource True Up	\$0
<b>Total Award</b>	<b>\$4,048,696</b>

**Background**

In D.13-09-023, the Commission adopted the Efficiency Savings and Performance Incentive (ESPI) mechanism for the 2013-2014 EE program cycle and beyond. The ESPI consists of the following components:

1. Non-Resource Program Management Fee

For the implementation of non-resource programs, the Investor Owned Utilities (IOUs) will receive a management fee equal to three percent of non-resource program expenditures, exclusive of administrative costs. The IOUs will use actual expenditures for the respective award year, as verified in the Utility, Audit, Finance, and Compliance Branch (UAFCB) reports. The potential earnings for the Non-Resource Program Management Fee are capped at three percent of the authorized non-resource program budgets and will be paid according to the schedule outlined below.

2. Codes & Standards (C&S) Program Management Fee

For the implementation of the C&S Program, the IOUs will receive a management fee equal to 12 percent of C&S program expenditures, exclusive of administrative costs. The IOUs will use actual expenditures for the respective award year, as verified in the UAFCB reports. The potential earnings for the C&S Program Management Fee are capped at 12 percent of the authorized C&S program budget and will be paid according to the schedule outlined below.

3. *Ex Ante* Review Process Performance Award

The Energy Division will conduct an annual assessment of the IOUs conformance with the *ex ante* review requirements established by the Commission. The assessment will generate a score, using a scale of 1 to 100, which will be multiplied, as a percentage, by three percent of the resource program expenditures, exclusive of administrative costs. The IOUs will use actual expenditures for the respective award year, as verified in the UAFCB reports. The potential earnings for the *Ex Ante* Review Process Performance Award are capped at three percent of the authorized resource program budget and will be paid according to the schedule outlined below.

4. Energy Efficiency Resource Savings Performance Award

For the implementation of resource programs, the IOUs are awarded an opportunity to earn an incentive based on the amount of net lifecycle energy savings achieved. The incentive is calculated as follows:

$$[\text{Gross Annual Savings}] \times [\text{Net to Gross Ratio}] \times [\text{Effective Useful Life}] \times [\text{Earnings Coefficient}] = [\text{Total Earnings}]$$

The potential earnings for the Energy Efficiency Resource Savings Performance Award are capped at nine percent of the authorized resource program budget and will be paid according to the schedule outlined below.

The Commission adopted the following schedule which outlines the payment sequence associated with the individual components of the ESPI:

- Claims for ESPI awards covering the first PY of each cycle shall be made during the first following year (PY+1) for the following elements:
  - Non-Resource Program Management Fee
  - C&S Program Management Fee
  - *Ex Ante* Review Process Performance Award
  - Preliminary *Ex Ante* Deemed Measure Savings Award
  
- Claims for ESPI awards covering the first PY of each cycle shall be made during the second following year (PY+2) for the following elements:
  - *Ex Post* Verified Custom Measure Savings Award
  - *Ex Post* Verified Deemed Measure Savings Award
  - True Up of Preliminary *Ex Ante* Deemed Measure Savings Award

In, D.14-10-046, the Commission directed the Investor Owned Utilities (IOUs) to file a Tier 1 Advice Letter to recalibrate the ESPI earnings cap and coefficients for PY 2015.<sup>1</sup> On February 23, 2015, SoCalGas filed Advice Letter 4764, which was approved by Energy Division on July 30, 2015.

In D.15-10-028, the Commission required that the ESPI Advice Letter be submitted no later than September 1 of each year.

On August 1, 2016, the Energy Division released the 2014 Ex-post Efficiency Savings and Performance Incentive (ESPI) Performance Statement Report (Performance Statement Report), which is included as Attachment A. In the Performance Statement Report, the Energy Division calculates the SoCalGas *ex post* component of the Energy Efficiency Resource Savings Performance Award for PY 2014 as \$2,030,067.<sup>2</sup>

Additionally on August 1, 2016, the Energy Division released additional guidance on the submittal of this ESPI Advice Letter, which is included as Attachment B.

In D.13-09-023, the Commission established an earnings cap for the 2013-2014 program cycle. As illustrated in Table 2, the earnings awarded to SoCalGas in Resolution (Res.) G-3497, Res. G-3510, and requested in this Advice Letter do not exceed the prescribed earnings cap for the 2013-2014 program cycle.

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<sup>1</sup> D.14-10-046, OP 20.

<sup>2</sup> 2014 Ex-Post Efficiency Savings and Performance Incentive (ESPI) Performance Statement Report, August 1, 2016, p 3.

**Table 2: SoCalGas 2013-2014 EE Earnings Compared to Earnings Cap**

Energy Efficiency Incentive Award	Earnings Award				2013-2014 Earnings Cap
	2013	2014	2015	2013-2014 Total	
2013-2014 Efficiency Savings and Performance Incentive					
Non-Resource Program Management Fee	\$110,342	\$128,906	\$0	\$239,248	\$256,359
C&S Program Management Fee	\$24,963	\$73,418	\$0	\$98,381	\$181,413
<i>Ex Ante</i> Review Process Performance Award	\$784,105	\$1,046,928	\$0	\$1,831,033	\$4,183,118
Energy Efficiency Resource Savings Performance Award	\$578,652	\$2,909,878	\$2,030,067	\$5,518,597	\$12,549,354
<b>SUBTOTAL</b>	<b>\$1,498,062</b>	<b>\$4,159,130</b>	<b>\$2,030,067</b>	<b>\$7,687,259</b>	
UAFCB Audit True Up	N/A	(\$5,262)	N/A	(\$5,262)	
<b>TOTAL</b>	<b>\$1,498,062</b>	<b>\$4,153,868</b>	<b>\$2,030,067</b>	<b>\$7,681,997</b>	

Note: 2015 includes the earnings award requested by SoCalGas in this Advice Letter, which is pending review by the Commission.

### **Calculation of Final 2014 Shareholder Incentive Award**

SoCalGas' final EE incentive award for PY 2014 is \$2,030,067 which is based on the incentive award formula associated with the ESPI components prescribed in D.13-09-023. Tables showing additional detail regarding the derivation of the final EE incentive award for 2014 are provided in Attachment C. The final PY 2014 incentive award is calculated as follows:

#### **1. Energy Efficiency Resource Savings Performance Award**

For the implementation of resource programs, SoCalGas has an opportunity to earn an incentive based on the total amount of net lifecycle savings it achieves. According to the ESPI mechanism and the adopted earnings schedule, SoCalGas is eligible to earn an incentive from the custom and deemed activity from PY 2014, as verified *ex post* by the Commission.<sup>3</sup> These awards are referred to as the *Ex Post* Verified Custom Measure Savings Award and the *Ex Post* Verified Deemed Measure Savings Award.

##### **a. Ex Post Verified Custom Measure Savings Award**

The Performance Statement Report calculates that SoCalGas installed 74,565,852 net lifecycle therm savings and 5,984,506 therms in market effects through its custom programs in PY 2014.<sup>4</sup> SoCalGas multiplied the

<sup>3</sup> Memorandum from Katie Wu on *Final ESPI Uncertain List for 2013-14* on December 6, 2013 issued to the service list of Rulemaking (R.) 12-01-005.

<sup>4</sup> ESPI\_2014\_Results\_Tables\_SCG.xlsx posted to <http://www.cpuc.ca.gov/general.aspx?id=4137> on 8/1/2016.

net lifecycle therm savings and the market effects by the earnings rate coefficient, as provided in D.13-09-023, Attachment 1, Table 3. This was done utilizing the following formula:

$$[\text{Net Lifecycle Savings}] \times [\text{Earnings Rate Coefficient}] + [\text{Market Effects Therms}] \times [\text{Earnings Rate Coefficient}] = [\text{Total Earnings}]$$

The *Ex Post* Verified Custom Measure Savings Award for PY 2014 is calculated as:

$$74,565,852/1,000,000 \times \$21,331 + 5,984,506/1,000,000 \times \$21,331 = \$1,718,220$$

**b. Ex Post Verified Deemed Measure Savings Award**

The Performance Statement Report calculates that SoCalGas installed 13,431,279 net lifecycle therm savings and 1,177,775 therms in market effects through its eligible deemed measures in PY 2014.<sup>5</sup> SoCalGas multiplied the net lifecycle therm savings and the market effects by the earnings rate coefficient, as provided in D.13-09-023, Attachment 1, Table 3. This was done utilizing the following formula:

$$[\text{Net Lifecycle Savings}] \times [\text{Earnings Rate Coefficient}] + [\text{Market Effects Therms}] \times [\text{Earnings Rate Coefficient}] = [\text{Total Earnings}]$$

The *Ex Post* Verified Deemed Measure Savings Award for PY 2014 is calculated as:

$$13,431,279 / 1,000,000 \times \$21,331 + 1,177,775/1,000,000 \times \$21,331 = \$311,626$$

**c. Total Savings Award**

The final PY 2014 incentive award claim is represented in Table 3 below.

**Table 3: Energy Efficiency Incentive Awards for PY 2014**

Energy Efficiency Incentive Award	Earnings Amount
Energy Efficiency Resource Savings Performance Award	
<i>Ex Post</i> Verified Custom Measure Savings Award	\$1,718,220
<i>Ex Post</i> Verified Deemed Measure Savings Award	\$311,626
Adjusted <i>Ex Ante</i> Review Earnings	\$221
<b>TOTAL</b>	<b>\$2,030,067</b>

<sup>5</sup> ESPI\_2014\_Results\_Tables\_SCG.xlsx posted to <http://www.cpuc.ca.gov/general.aspx?id=4137> on 8/1/2016.

## **Calculation of Initial 2015 Shareholder Incentive Award**

SoCalGas' initial EE incentive award for PY 2015 is \$2,018,629 which is based on the incentive award formula associated with the ESPI components prescribed in D.13-09-023. The remainder of the award associated with PY 2015 will be contained in the 2017 Advice Letter covering the *ex post* deemed and custom measure awards, the true-up of the preliminary deemed measure awards, and a true-up associated with audit-verified expenditures. Tables showing additional detail regarding the derivation of the initial EE incentive award for 2015 are provided in Attachment C. The initial PY 2015 incentive award is calculated as follows:

### **1. Non-Resource Program Management Fee**

The Non-Resource Program Management Fee is calculated as an earnings award equal to three percent of non-resource program expenditures, exclusive of administrative costs. The SoCalGas programs categorized as non-resource programs for PY 2015 were included in Advice Letter 4764. As reported in the SoCalGas 2015 EE Annual Report, the non-resource program expenditures for PY 2015, excluding administrative costs, were \$11,242,586.

The Non-Resource Program Management Fee for PY 2015 is calculated as:

$$\$11,242,586 \times 3\% = \$337,278$$

### **2. C&S Program Management Fee**

The C&S Program Management Fee is calculated as an earnings award equal to 12 percent of C&S program expenditures, exclusive of administrative costs. As reported in the SoCalGas 2015 EE Annual Report, the C&S program expenditures for PY 2015, excluding administrative costs, were \$491,746.

The C&S Program Management Fee for PY 2015 is calculated as:

$$\$491,746 \times 12\% = \$59,009$$

### **3. Ex Ante Review Process Performance Award**

The *Ex Ante* Review Process Performance Award is calculated based on the performance score for each IOU, as prescribed in Attachments 5 and 7 of D.13-09-023. This score is taken as a percentage applied to three percent of EE resource program expenditures, exclusive of administrative costs. On April 4, 2016, the Commission issued SoCalGas its 2015 performance score of 41.91,

which is expressed as 0.4191.<sup>6</sup> As reported in the SoCalGas 2015 EE Annual Report, the resource program expenditures for PY 2015, excluding administrative costs, was \$47,745,073.

The *Ex Ante* Review Process Performance Award for PY 2015 is calculated as:

$$\$47,745,073 \times 3\% \times 41.91\% = \$600,299$$

#### **4. Energy Efficiency Resource Savings Performance Award**

For the implementation of resource programs, SoCalGas has an opportunity to earn an incentive based on the total amount of net lifecycle savings it achieves. According to the ESPI mechanism and the adopted earnings schedule, SoCalGas is eligible to earn an incentive from the PY 2015 deemed measure activity, excluding those deemed measures identified as uncertain by the Commission.<sup>7</sup> This is referred to as the Preliminary *Ex Ante* Deemed Measure Savings Award.

First, SoCalGas calculated the net lifecycle energy savings associated with the eligible *ex ante* deemed measure activity in PY 2015. This was done utilizing the following formula:

$$[\text{Unit Count}] \times [\text{Gross Annual Savings}] \times [\text{Net to Gross Ratio}] \times [\text{Effective Useful life}] \\ = [\text{Net Lifecycle Savings}]$$

SoCalGas completed this calculation on a measure level basis and summed the results so that the total net lifecycle savings for eligible deemed measures in PY 2015 is 33,644,662 therms.

The unit count and *ex ante* calculation parameters are included as part of the SoCalGas 2015 EE Annual Report, submitted on May 2, 2016, and are in accordance with the Database for Energy Efficient Resources (DEER) and/or the non-DEER work papers approved by Commission Staff.

The SoCalGas 2015 EE Annual Report did not include a market effects adder of five percent. In Res. G-3497, the Commission applied the five percent market effects adder to the ESPI calculations. SoCalGas incorporates the five percent market effects adder in its calculations for the PY 2015 Energy Efficiency Resource Savings Performance Award.

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<sup>6</sup> Memorandum from CPUC *Ex Ante* Review Staff on *Final 2015 Efficiency Savings and Performance Incentive Ex Ante Review Performance Scores* on April 4, 2016 issued to the service lists of R.12-01-005 and R.13-11-005.

<sup>7</sup> Memorandum from Katie Wu on *Final 2015 ESPI Uncertain List* on December 1, 2014 issued to the service list of R.13-11-005.



Second, SoCalGas multiplied the net lifecycle savings, including market effects, by the earnings rate coefficient, as provided in Advice Letter 4764. This was done utilizing the following formula:

$$[\text{Net Lifecycle Savings}] \times [\text{Earnings Rate Coefficient}] = [\text{Total Earnings}]$$

The Preliminary *Ex Ante* Deemed Measure Savings Award for PY 2015 is calculated as:

$$33,644,662/1,000,000 \times \$30,454 = \$1,024,615$$

##### **5. 2014 UAFCB Audit True Up**

In the Financial, Management, Regulatory, and Compliance Examination Report on Southern California Gas Company's Energy Efficiency For the Period January 1, 2014 through December 31, 2014 (2014 Audit Report), the UAFCB included two audit observations recommending that certain expenditures be excluded from this ESPI Advice Letter.<sup>8</sup> The UAFCB did find that the expenditures were appropriate energy efficiency expenses. However, it did conclude that certain expenditures should have been charged to PY 2013, and not PY 2014; therefore, are not eligible for this ESPI Advice Letter. SoCalGas summarizes the two observations below:

###### Observation 16

The UAFCB identified that SoCalGas incorrectly included expenditures from the Statewide Custom Calculated Incentive (CCI) program totaling \$110,226 in PY 2014 that should have been included with PY 2013 expenditures. UAFCB recommends that these expenditures be removed from this ESPI Advice Letter.

As a result, SoCalGas removes \$110,226 in direct implementation expenditures from the CCI program total expenditures.

###### Observation 19

The UAFCB identified that SoCalGas incorrectly included expenditures from the Statewide Industrial Calculated Incentive (ICI) program totaling \$13,120 in PY 2014 that should have been included with PY 2013 expenditures. UAFCB recommends that these expenditures be removed from this ESPI Advice Letter.

As a result, SoCalGas removes \$13,120 in direct implementation expenditures from the ICI program total expenditures.

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<sup>8</sup> Financial, Management, Regulatory, and Compliance Examination Report on Southern California Gas Company's Energy Efficiency For the Period January 1, 2014 through December 31, 2014, p. 1.

Total ESPI Adjustment

SoCalGas removes \$110,226 and \$13,120, or \$123,346 of total direct implementation expenditures from the resource program expenditures in PY 2014. A reduction of resource program expenditures in PY 2014 would impact the *Ex Ante* Review Process Performance Award. SoCalGas calculates the adjustment as follows:

$$\$123,346 \times 3\% \times 69.50\%^9 = \$2,572$$

**6. Initial Award for 2015**

The initial PY 2015 incentive award claim is represented in Table 4 below.

**Table 4: Energy Efficiency Incentive Awards for PY 2015**

Energy Efficiency Incentive Award	Earnings Amount	Earnings Cap
Non-Resource Program Management Fee	\$337,278	\$392,899
C&S Program Management Fee	\$59,009	\$91,293
<i>Ex Ante</i> Review Process Performance Award	\$600,299	\$1,634,915
Energy Efficiency Resource Savings Performance Award	\$1,024,615	\$4,904,746
<b>SUBTOTAL</b>	<b>\$2,021,201</b>	<b>\$7,023,853</b>
2014 UAFCB Audit True Up	(\$2,572)	N/A
<b>TOTAL</b>	<b>\$2,018,629</b>	<b>\$7,023,853</b>

**Dispensation of the Shareholder Incentive Award**

D.13-09-023 directed the utilities to file a Tier 3 Advice Letter with the claim for the final PY 2014 and initial PY 2015 awards according to the schedule set forth in Attachment 6.<sup>10</sup> This submission is thus in compliance with Commission orders, and is intended to accommodate the processing schedule outlined in D.13-09-023, D.14-10-046, and D.15-10-028.

The table below summarizes the revenue requirement impact by class of service. In addition, SoCalGas provides herein as Attachment D the annual Natural Gas Transportation Rate Revenues table comparing present and proposed rates associated with inclusion of the final PY 2014 and initial PY 2015 shareholder incentive award in its gas transportation rates.

<sup>9</sup> SoCalGas received a PY 2014 performance score of 69.50 in the Memorandum from CPUC Ex Ante Review Staff on Final 2014 Efficiency Savings and Performance Incentive Ex Ante Review Performance Scores on March 27, 2015 issued to the service lists of R.12-01-005 and R.13-11-005.

<sup>10</sup> D.13-09-023, OP 4 and 6.

**Table 5: Revenue Requirement Impact by Class of Service (Includes FF&U)**

Class of Service	Applicable Rate Schedules	Increase/ (decrease) \$000's
Core	GR, GS, GM, GO-AC, G-NGVR, GL, G-10, G-AC, G-EN, G-NGV	\$3,861
Noncore	GT-F, GT-I, GT-TLS	\$234
<b>Total</b>		<b>\$4,095</b>

**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 September 21, 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](mailto:EDTariffUnit@cpuc.ca.gov)). A copy of the protest should 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.

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](mailto:snewsom@SempraUtilities.com)

**Effective Date**

OP 4 of D.13-09-023 orders SoCalGas to file this Advice Letter as Tier 3 and, as such, requires a Resolution to be issued by the Commission. SoCalGas respectfully requests that it be approved by the Commission at the earliest opportunity, and before year-end 2016, so that it may provide the desired market certainty associated with energy efficiency shareholder awards, and be included in the January 1, 2017 gas transportation rate change.

**Notice**

A copy of this Advice Letter is being sent to SoCalGas' GO 96-B service list and the Commission's service list in R.12-01-005. Address change requests to the GO 96-B should be directed by electronic mail to [tariffs@socalgas.com](mailto: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](mailto:Process_Office@cpuc.ca.gov).

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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) #: 5024

Subject of AL: Energy Efficiency Incentive Award for Program Years (PY) 2014 and 2015

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.13-09-023, D.14-10-046, and 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 AL<sup>1</sup>: N/A

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

Resolution Required?  Yes  No

Tier Designation:  1  2  3

Requested effective date: After Commission Approval    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 proposed<sup>1</sup>: 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 5<sup>th</sup> Street, GT14D6  
Los Angeles, CA 90013-1011  
SNewsom@semprautilities.com  
Tariffs@socalgas.com**

<sup>1</sup> Discuss in AL if more space is needed.

**ATTACHMENT A**

**Advice No. 5024**

**2014 Ex-Post Efficiency Savings and Performance Incentive (ESPI)**

**Final Performance Statement Report**

PUBLIC UTILITIES COMMISSION

505 VAN NESS AVENUE  
SAN FRANCISCO, CA 94102-3298



2014 Ex-Post Efficiency Savings and  
Performance Incentive (ESPI)  
**Final Performance Statement Report**

**August 1, 2016**

## 1. Introduction

This Final Performance Statement report provides Commission Staff's proposed earnings amounts for the 2014 Efficiency Savings and Performance Incentive. These earnings amounts reflect the following:

- Applying impact evaluation results to ex-post lifecycle net savings
- Adding 5% of the lifecycle gross savings to account for market effects
- Making adjustments to make sure records from the ex-ante and ex-post saving incentives are not double counted
- Applying ex-post installation rates to the ex-ante records
- Reducing PG&E's earnings by \$39K to account for projects at facilities with on-site generation that received incentives without reducing project savings for periods in which the sites were net exporters and therefore not purchasing PG&E power subject to non-bypassable EE collections (during these periods, the efficiency project increases the on-site generation sales by the customer to the grid).

A public input webinar was held on June 30, 2016. Southern California Gas Company and Pacific Gas and Electric Company provided comments on July 7, 2016<sup>1</sup>. Appendix F includes a list of comments and responses. Commission Staff will finalize the report by August 1, 2016 and the IOUs will file advice letters by September 1, 2016 at the latest. The CPUC will determine the final awards by adopting a resolution.

## 2. Regulatory Background

D.13-09-023 adopted the Efficiency Savings and Performance Incentive (ESPI) and D.15-10-028 modified the ESPI schedule so the Draft Performance Statement Report is due on June 15, 2016<sup>2</sup>.

Commission Staff posted the draft 2014 ESPI-related impact evaluation studies on March 1, 2016 and held a series of in-person public stakeholder workshops from March 8, 2016

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<sup>1</sup> Comments can be found here: <http://www.energydataweb.com/cpuc/comment.aspx?did=1564>

<sup>2</sup> See Appendix 5 of D.15-10-028: <http://docs.cpuc.ca.gov/PublishedDocs/Published/G000/M155/K511/155511942.pdf>



to March 10, 2016. Commission Staff and its evaluation consultants reviewed the technical comments and made edits to the draft impact evaluation reports and data where necessary, and posted the final impact evaluation reports April 1, 2016<sup>3</sup>.

In response to public comments from the 2013 ESPI process, Commission Staff and its evaluation consultants held a public-input workshop on April 22, 2016 to go over the technical detail of the 2014 ESPI dataset, which is the source of the energy savings numbers used in this report<sup>4</sup>.

### 3. Earnings

Based on the values from the 2014 ESPI database and the earnings coefficients established in D.13-09-023, Commission staff recommends the following earnings amounts for utility performance of 2014 energy efficiency program activity. These amounts include a 5% of lifecycle gross savings adder for market effects and the application of ex-post installation rates to ex-ante values. Additionally, adjustments to the ex-ante savings incentive estimates paid as part of Resolution G-3510 were made and the resulting change in earnings is provided in the column *Adjusted Ex-Ante Review Earnings*<sup>\*</sup>. These earnings reflect the adjustments made as a result of the Home Energy Report savings explained in Appendix E. Finally, PG&E’s earnings were reduced by \$39K to account for projects at facilities with on-site generation that received incentives without reducing project savings for periods in which the sites were net exporters.

**Table 1 – Proposed 2014 Ex-Post Earnings and Ex-Ante Adjustments by Utility**

	kWh Earnings	kW Earnings	Therms Earnings	Sum of Ex-Post Earnings	Adjusted Ex-Ante Review Earnings	Total New Payment
PG&E	\$7,290,311	\$4,162,956	\$2,205,115	\$13,658,382	-\$77,462	\$13,580,920
SCE	\$8,643,296	\$3,094,733		\$11,738,029	-\$378,907	\$11,359,122
SCG			\$2,029,846	\$2,029,846	\$221	\$2,030,067
SDG&E	\$1,131,974	\$667,451	\$138,240	\$1,937,665	\$45,341	\$1,983,006
<b>Total Statewide</b>	<b>\$17,065,581</b>	<b>\$7,925,140</b>	<b>\$4,373,201</b>	<b>\$29,363,922</b>	<b>-\$410,806</b>	<b>\$28,953,116</b>

<sup>\*</sup> Please see Appendix D for an explanation of the development of the Adjusted Ex-Ante Review Earnings

<sup>3</sup> All draft and final reports can be found at <http://www.energydataweb.com/cpuc/search.aspx>

<sup>4</sup> The 2014 ESPI database and other files can be found under the heading “2014 Ex-Post ESPI” at this URL: <http://www.cpuc.ca.gov/General.aspx?id=4137>

The earnings are based on the lifecycle net electric, demand, and natural gas savings for both deemed and custom measures. In Table 2 the ex-post lifecycle net savings values for both deemed and custom measures are shown along with how the savings translates to the proposed earnings amounts in Table 1. In Table 2 the IOU specific row, *Total Payment*, includes the addition of 5% for market effects.

Table 2 - 2014 Ex-Post Savings for Lifecycle (LC) Custom and Deemed by Utility

	Electric (GWh)	Demand (MW)	Natural Gas (MM Therms)	Total
<b>PG&amp;E</b>				
ExPost (LC Net) Deemed	1,078	276	-1	
ExPost (LC Net) Custom	1,560	340	95	
<b>Total ExPost LC Net</b>	<b>2,638</b>	<b>616</b>	<b>95</b>	
Earnings Rate	\$2,525	\$6,200	\$21,331	
Payment (Before Market Effects)	\$6,661,561	\$3,822,278	\$2,017,952	<b>\$12,501,792</b>
<b>Total Payment</b>	<b>\$7,290,311</b>	<b>\$4,162,956</b>	<b>\$2,205,115</b>	<b>\$13,658,382</b>
<b>SCE</b>				
ExPost (LC Net) Deemed	1,535	254		
ExPost (LC Net) Custom	1,574	201		
<b>Total ExPost LC Net</b>	<b>3,109</b>	<b>455</b>		
Earnings Rate	\$2,525	\$6,200		
Payment (Before Market Effects)	\$7,850,647	\$2,819,612		<b>\$10,670,259</b>
<b>Total Payment</b>	<b>\$8,643,296</b>	<b>\$3,094,733</b>		<b>\$11,738,029</b>
<b>SCG</b>				
ExPost (LC Net) Deemed			13	
ExPost (LC Net) Custom			75	
<b>Total ExPost LC Net</b>			<b>88</b>	
Earnings Rate			\$21,331	
Payment (Before Market Effects)			\$1,877,067	<b>\$1,877,067</b>
<b>Total Payment</b>			<b>\$2,029,846</b>	<b>\$2,029,846</b>
<b>SDG&amp;E</b>				
ExPost (LC Net) Deemed	129	44	0	
ExPost (LC Net) Custom	277	55	6	
<b>Total ExPost LC Net</b>	<b>407</b>	<b>99</b>	<b>6</b>	
Earnings Rate	\$2,525	\$6,200	\$21,331	
Payment (Before Market Effects)	\$1,026,825	\$612,865	\$127,733	<b>\$1,767,423</b>
<b>Total Payment</b>	<b>\$1,131,974</b>	<b>\$667,451</b>	<b>\$138,240</b>	<b>\$1,937,665</b>

#### 4. Components of the Earnings Calculation

##### Earnings Coefficients

D.13-09-023 established the earnings coefficient to apply to each unit of savings each IOU achieved in 2014, on an ex-post basis:

Electricity (\$/GWh)	\$2,525
Peak Demand (\$/MW – Yr)	\$6,200
Natural Gas (\$/MMTh)	\$21,331

Commission staff applies these coefficients to the net lifecycle ex-post values per IOU for kWh, kW, and therms.

##### Lifecycle Savings

To estimate lifecycle kWh, kW, and therms savings, Commission Staff applied the ex-post parameters from the final 2014 ESPI impact evaluation reports. Per Attachment 2 of D.13-09-023, the following parameters may be updated for purposes of determining performance:

1. Measure Installations/Measure Count
2. Unit Energy Savings
3. Gross Energy Savings (product of 1 and 2)
4. Net-To-Gross Ratios by Program Strategy and/or Measure
5. Net Energy Savings (product of 3 and 4)
6. Effective Useful Life
7. Load Factor or Daily Load Shape used to transform annual electricity savings estimates into peak savings estimates
8. For custom projects, all components of the projects will be subject to review. An evaluation based estimate of the savings claim for custom projects in the defined program year will be applied

## Ex-Post Results

Commission staff's evaluation contractors produced 2014 ex-post ESPI impact evaluations (hereafter 2014 ESPI impact evaluations) for "uncertain measures" as identified in D.13-09-023. The impact evaluation reports are available on the Public Documents Area at <http://www.energydataweb.com/cpuc/search.aspx>.

Table 3 lists which uncertain measures were included as part of a 2014 ESPI impact evaluation report. Section 5 describes the decision-tree Commission staff used to apply ex-post results or passed through reported values.

**Table 3 - Measures that Received Ex-Post Updates**

Uncertain Measure Group		
Behavior	Non-res downstream lighting	Residential lighting
Custom projects	Non-res new construction	Sprinklers
Home upgrade program	PC Power Management	Water kits
HVAC mini-split	Pipe insulation Sprinklers	
HVAC quality maintenance	Pool pump	

### 5. Creation of Ex-Post Dataset

Commission staff utilized the detailed quarterly tracking data for 2014 as the foundation for prioritizing evaluation activities and applying updates from evaluation work. The ex-post 2014 ESPI impact evaluation reports carried out Commission staff's guidance to make updates to the claims on a parameter basis. Commission staff and evaluation contractors utilized the following options in making updates to the utility savings claims for the aforementioned parameters:

1. Pass through: Accept reported savings values for claims that do not fall within the frame of an impact evaluation (no change); or

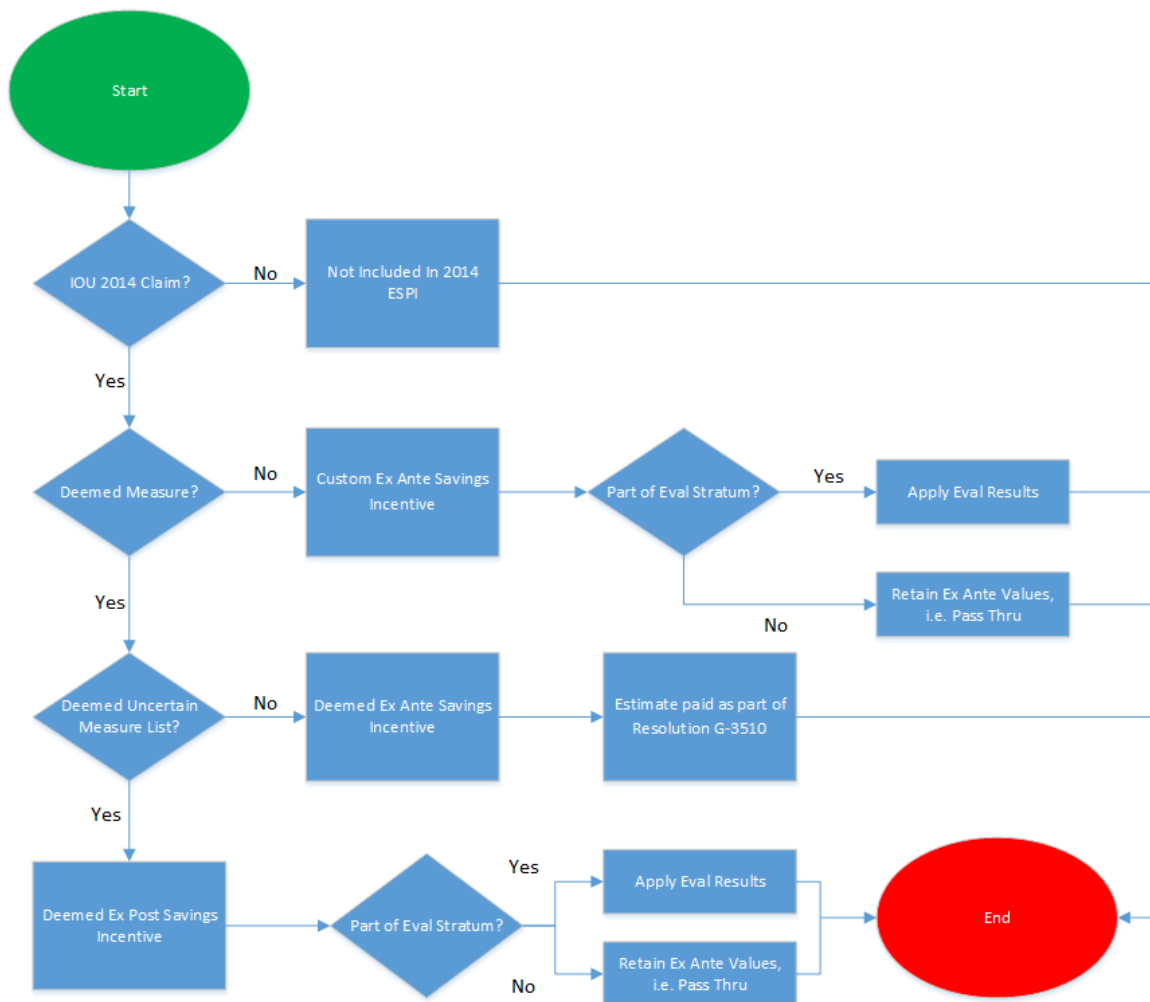
2. Apply results from the 2014 impact evaluation studies: Apply stratum-level results to records included in the frame of an impact evaluation.

### Evaluation Decision Tree

The decision tree in the following figure illustrates how Commission Staff updated IOU claims with evaluation results from the 2014 ESPI impact evaluation reports.

More detailed information regarding how the ex-post dataset was created can be found in Appendix C.

**Figure 1: Savings Incentive Record Grouping Decision Tree - 2014 ESPI**



## 6. Biggest Drivers of Change in Earnings

This section provides three different views at the key drivers of evaluation updates for the portfolio based on the 2014 ESPI process.

The first subsection presents the relative effect of updates to each of the parameters on the overall claimed savings. The graphics illustrate how the evaluated parameters change the lifecycle savings first from gross ex-ante to gross ex-post and then to net ex-post. The graphs illustrate which parameters had the biggest impact on evaluated net savings (i.e. was it the installation rate, or UES, or the EUL, or the NTG).

The next subsection shows how much of the net lifecycle savings values were “Passed Through vs. Evaluated to highlight what percent of the portfolio savings were “touched” or updated based on an evaluation result.

The last section presents the distribution of savings by ESPI measure group for measures that make up the 2014 ESPI Deemed Uncertain measures. This graphic reveals which measures had the largest contribution to savings.

### a. Key Drivers of Evaluation Updates – Parameter Updates

The following graphics provide an illustration of the relative influence of each parameter update. Several caveats are necessary to appreciate the limitations and value of these graphics and their calculation is pathway-dependent. First, more than one parameter update may have been applied to a measure (e.g. unit energy savings and EUL or RUL were updated for an installed light bulb). This is of particular importance when measures were identified as being Early Retirement, but were reported as Replace on Burnout. Hence, the influence of each parameter cannot be completely isolated since they interact. Second, the parameter may have multiple factors within its calculation that could influence the value (e.g. hours of use within the unit energy savings) and this break down is at the highest parameter level. Third, the parameter gauging program influence (the net to gross ratio) is estimated in the program plans, and in many cases updated with evaluated results. The graphics show the program attribution in its two constituent parts to illustrate the additional net adjustments from evaluation relative to the already assumed net adjustment. The following parameter adjustments in the graphics are defined as follows:

- a) Installation Rate – the units were verified as installed and operating

- b) Unit Energy Savings & Realization Rate Adjustment
  - i. Unit Energy Savings (UES) – savings per unit installed (primarily for deemed measures)
  - ii. Realization Rate (RR) – savings achieved versus expected (ratio used primarily for custom projects)
- c) Effective Useful Life/Remaining Useful Life Adjustment – adjustments made to EUL and RUL
- d) Program Influence Expected Adjustment (reported) – planning assumption of program influence
- e) Program Influence Evaluation Adjustment – incremental difference in program influence found through field evaluation

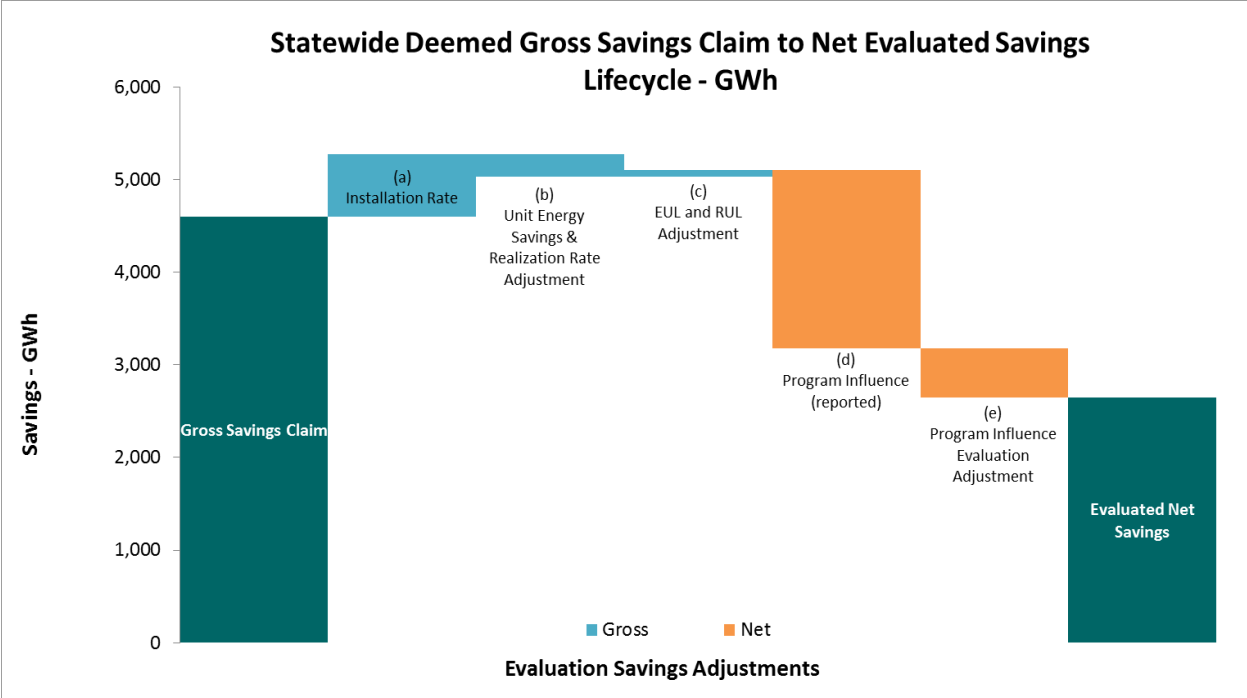
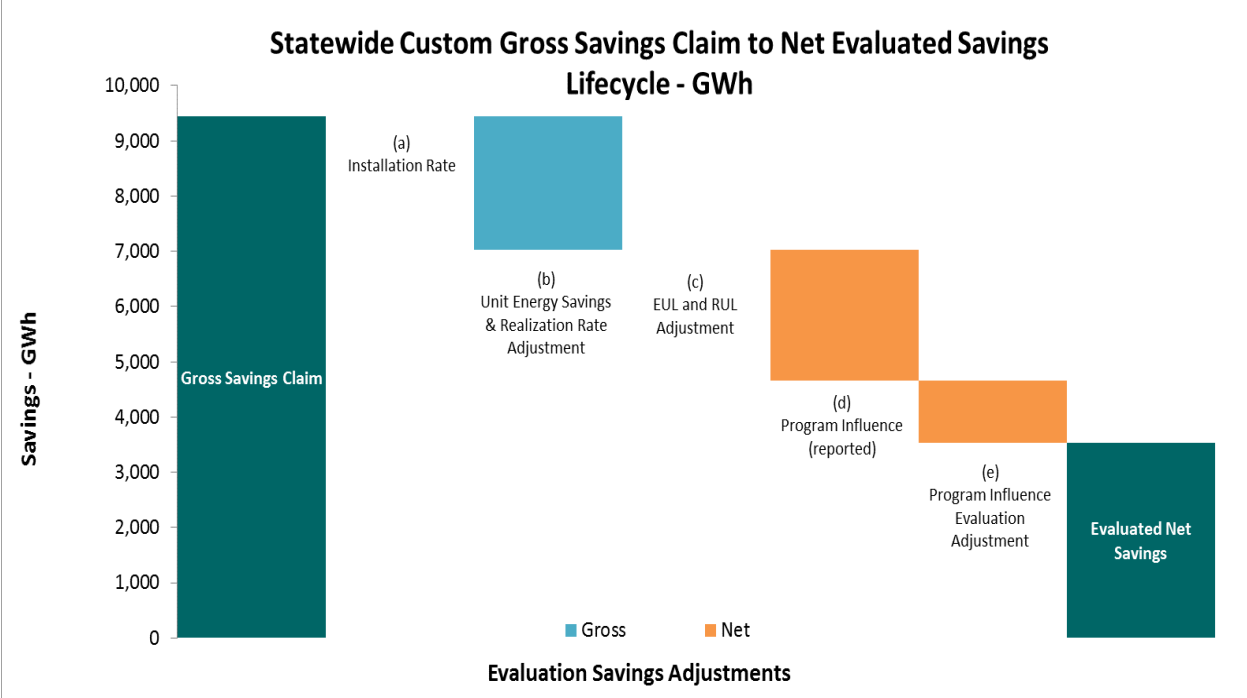
The statewide results are provided in the following series of graphics<sup>5</sup>, while the utility specific results are presented in the utility specific workbooks found online<sup>6</sup> with the statewide workbook from which these graphics were taken.

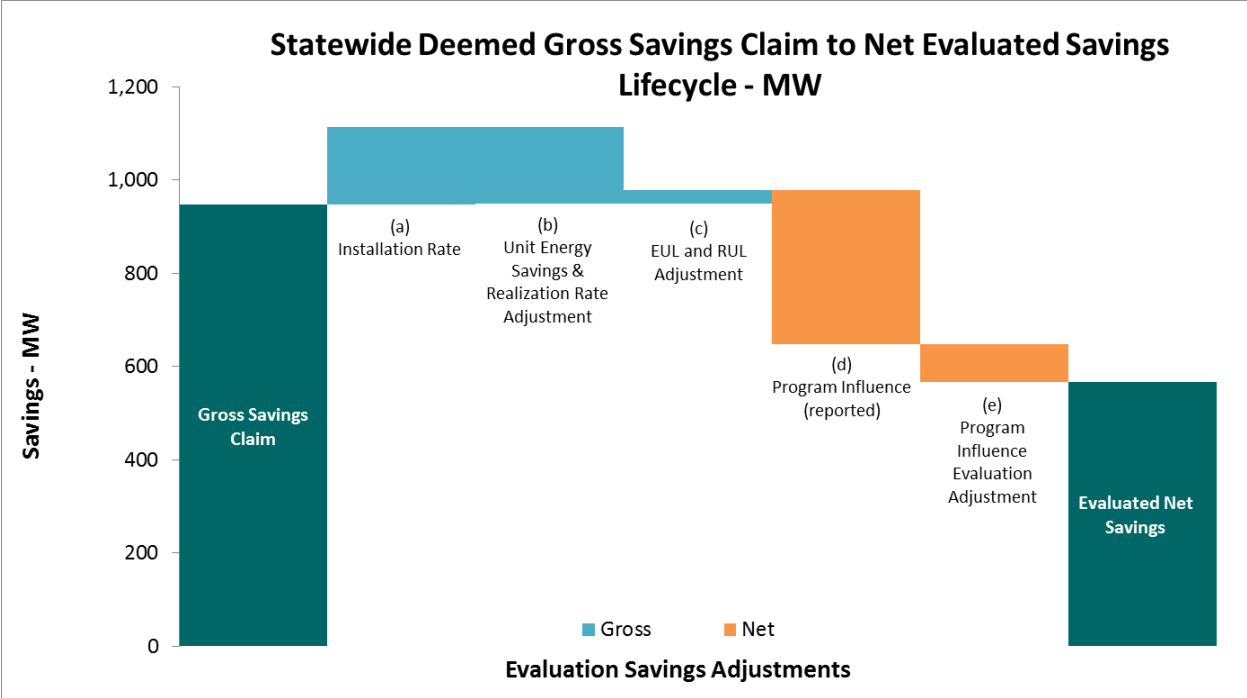
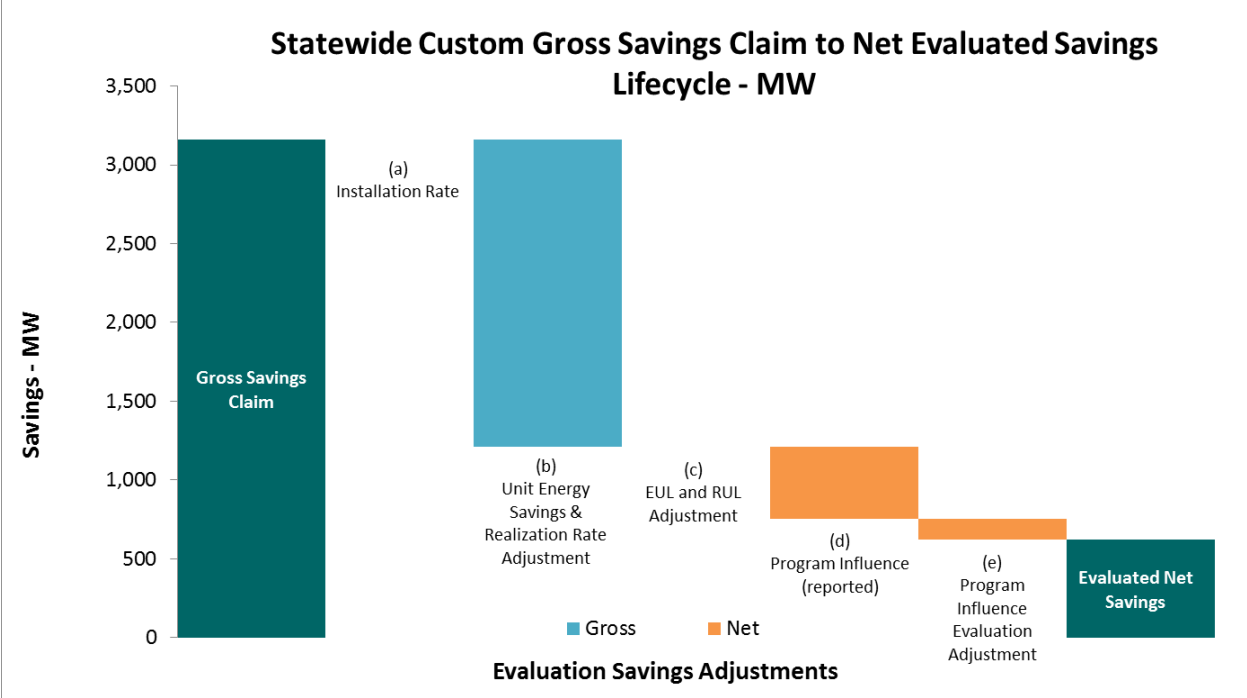
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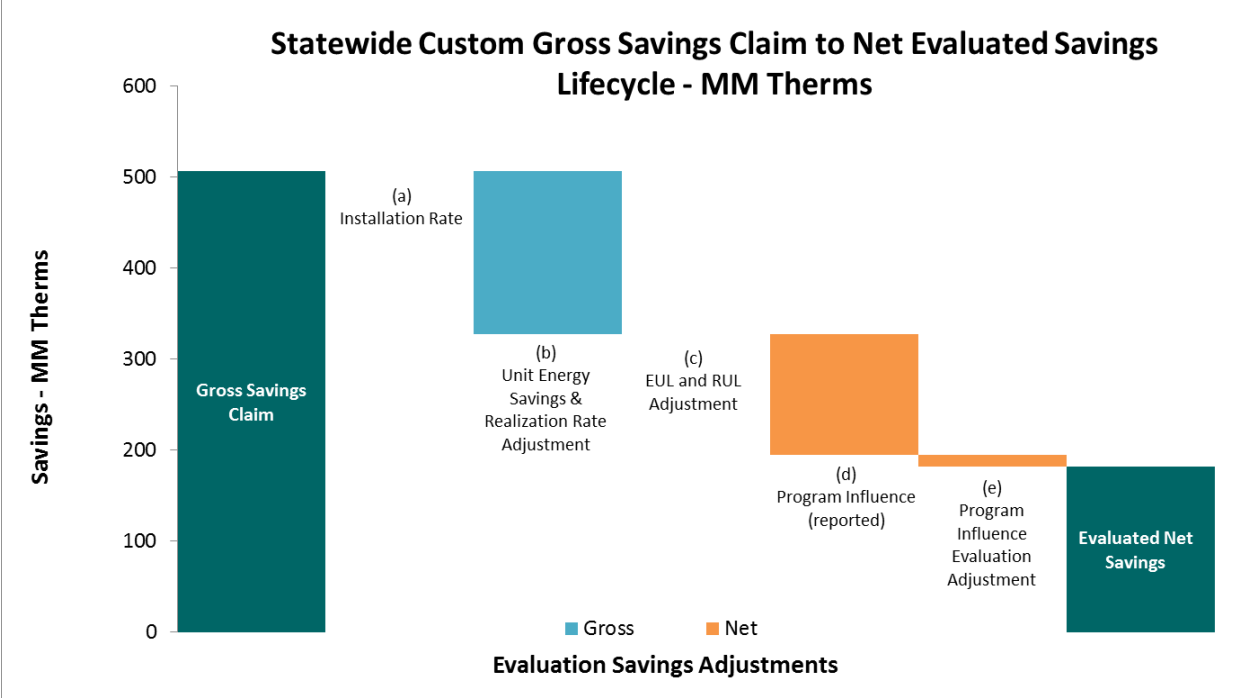
<sup>5</sup> The lifecycle therms savings for deemed measures graph is not included in this report, intentionally, due to difficulties graphically displaying the negative therms values.

<sup>6</sup> The workbooks can be found under the heading “2014 Ex-Post ESPI” at this URL: <http://www.cpuc.ca.gov/General.aspx?id=4137>





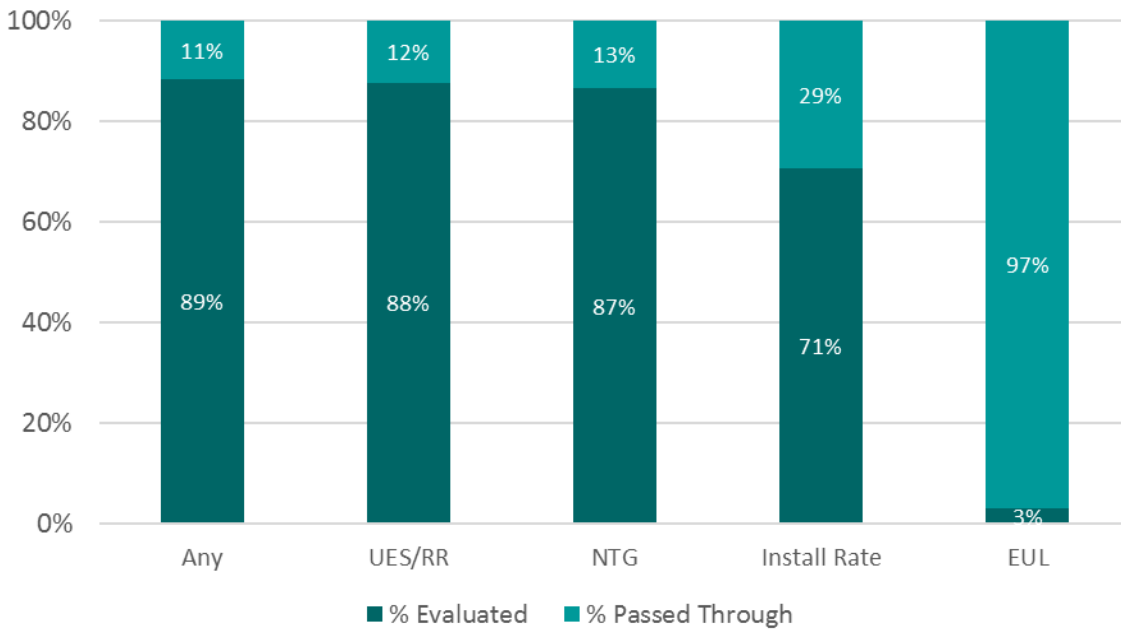


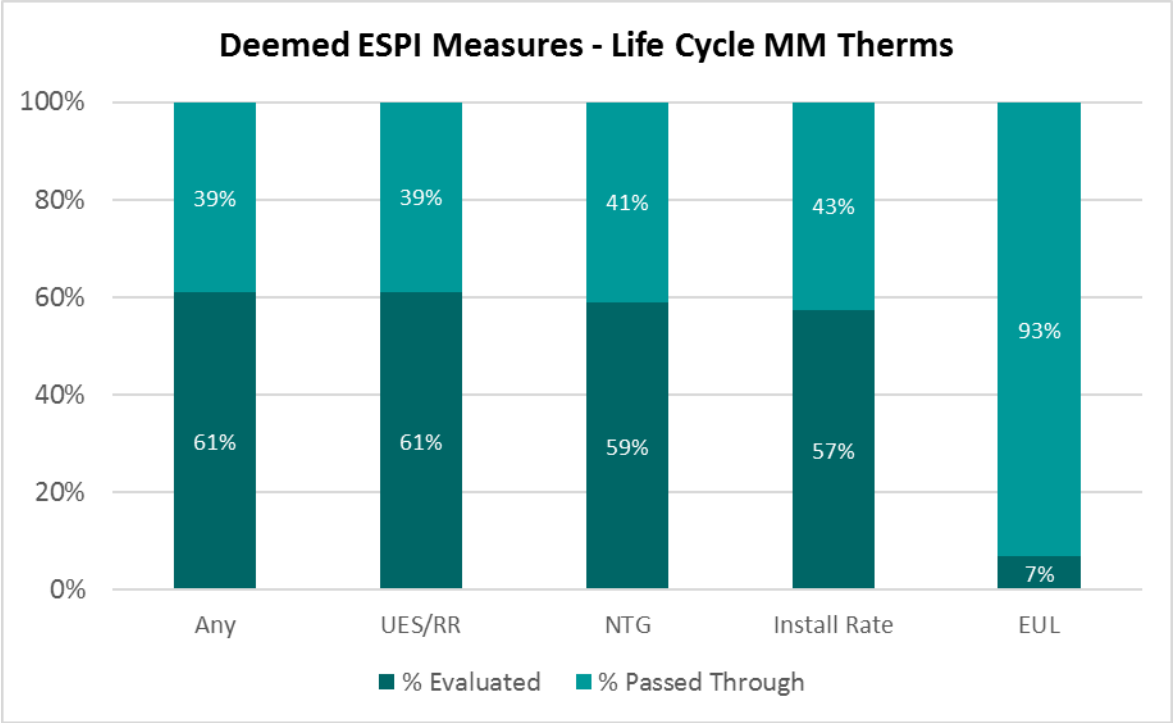
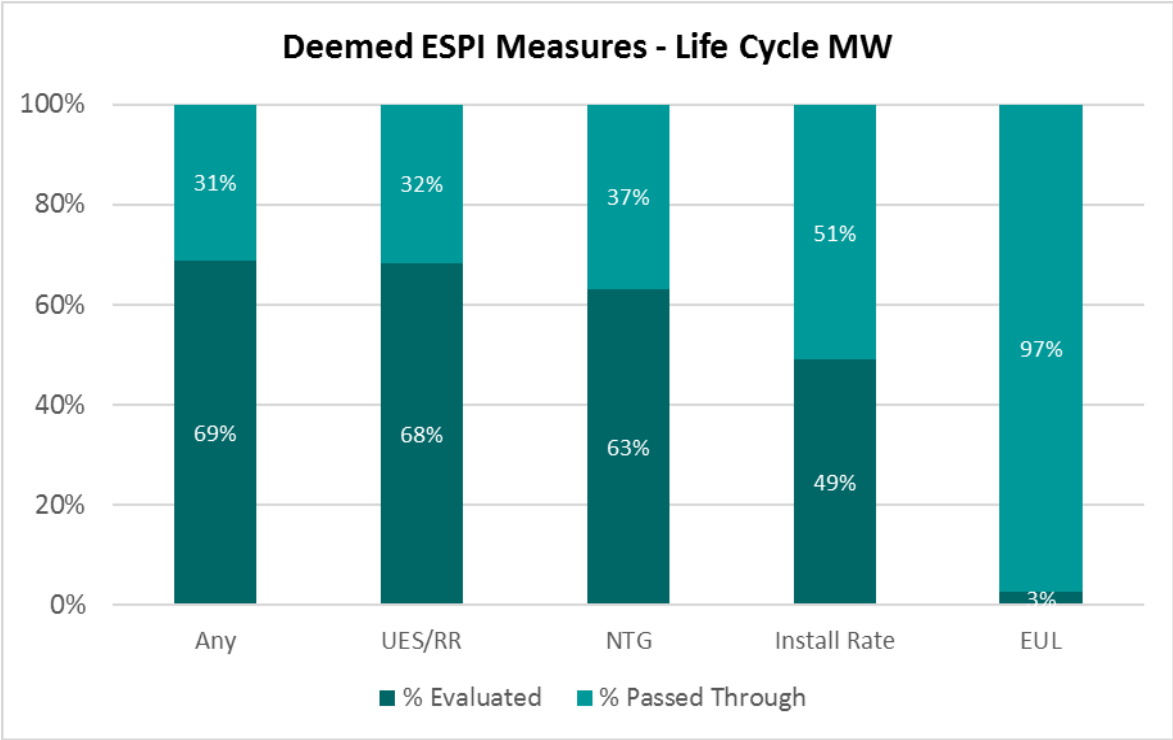


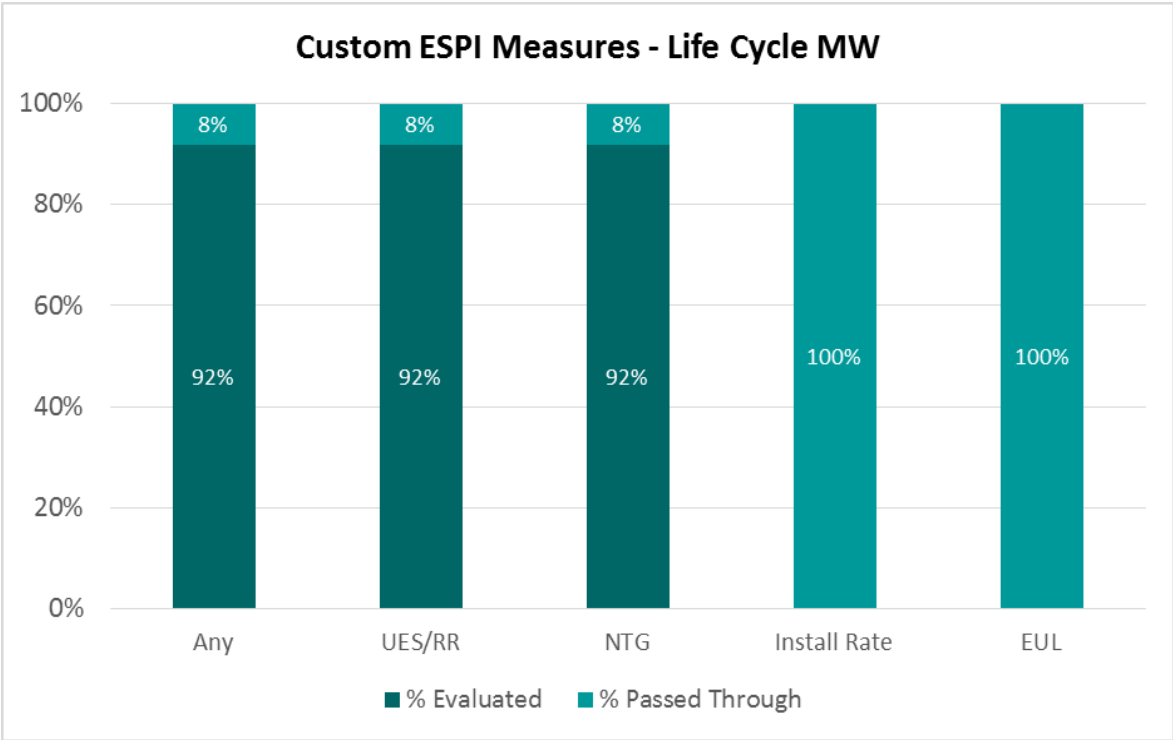
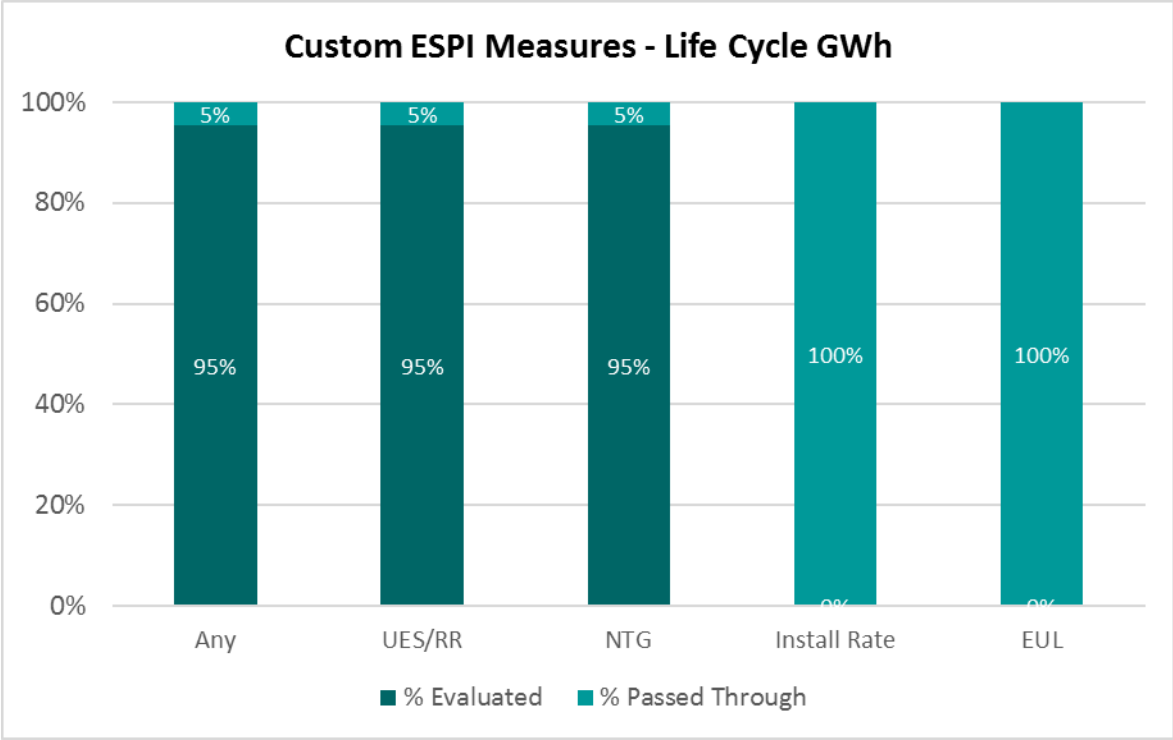
**b. Key Drivers of Evaluation Updates – Pass-Through versus Evaluated Records**

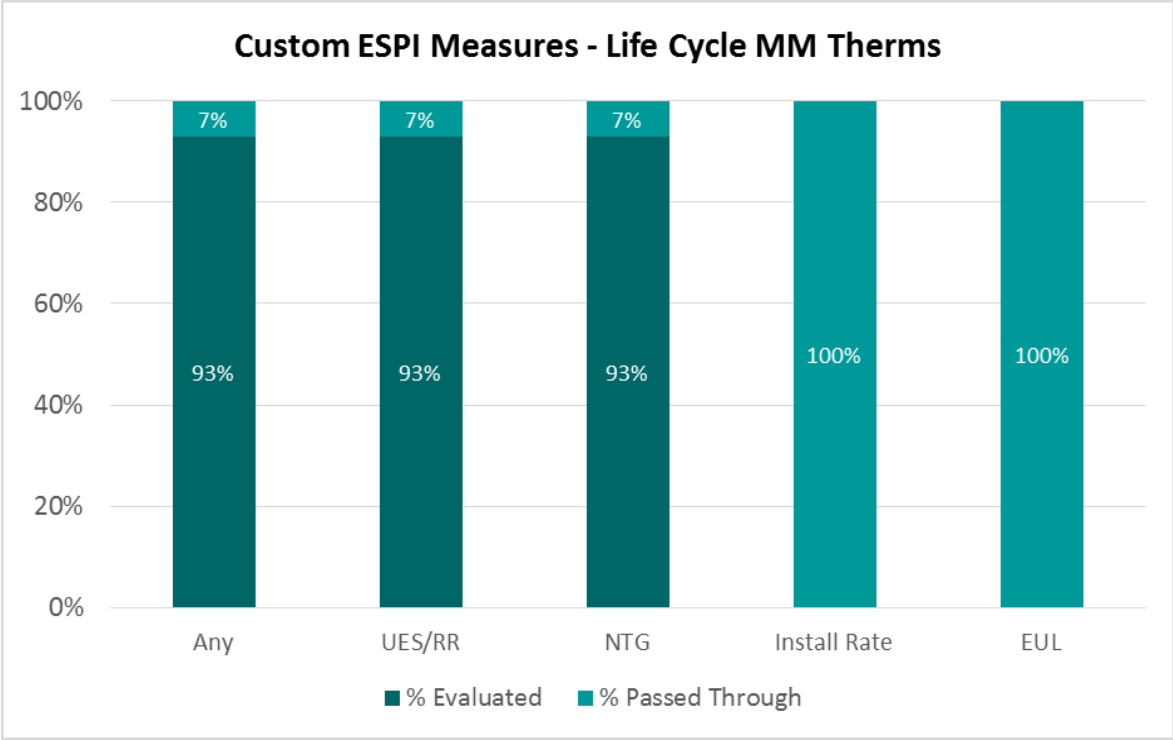
The following charts show the percent of reported lifecycle savings, which received an evaluation update for each parameter. The 2014 impact evaluation reports covered a portion of the portfolio, with 11% of the deemed lifecycle kWh savings and 39% of the lifecycle therms savings being passed through. This represents a marked increase in coverage upon the same numbers for 2013 ESPI. For custom measures, 95% of lifecycle kWh savings and 93% of lifecycle therms savings received some evaluation update. Notably, for custom and deemed measures, the EUL parameter was the least evaluated. The lifecycle therms chart is included, but in order to calculate a percentage of savings that were passed through, an absolute value of the savings was taken. IOU specific charts can be found at this URL: <http://www.cpuc.ca.gov/General.aspx?id=4137>

### Deemed ESPI Measures - Life Cycle GWh





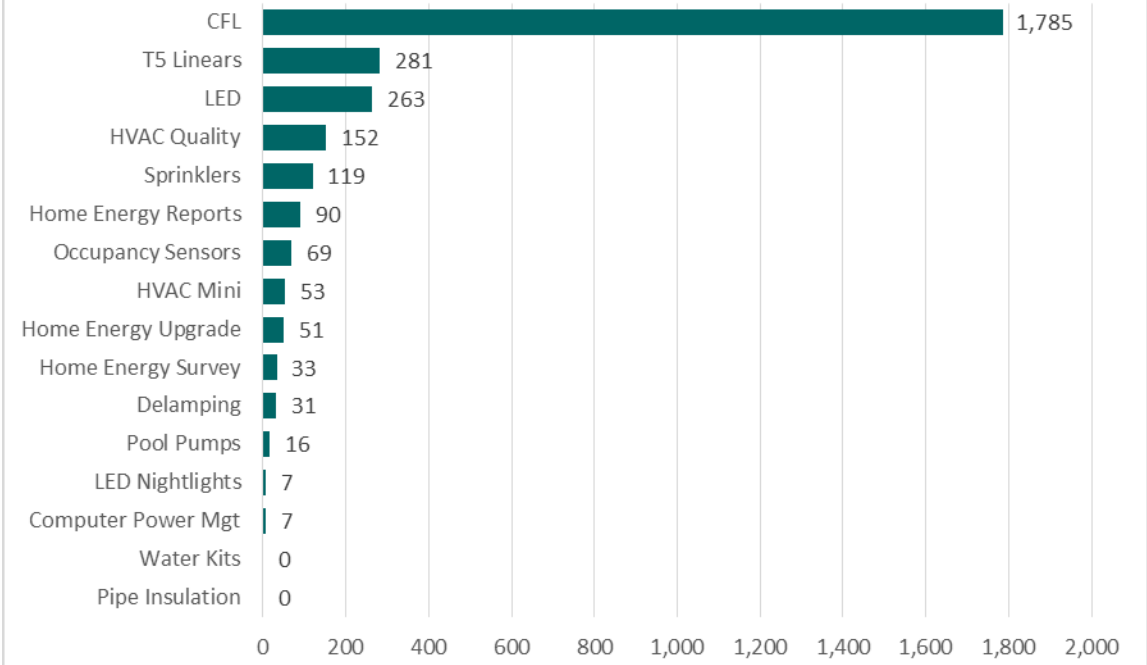




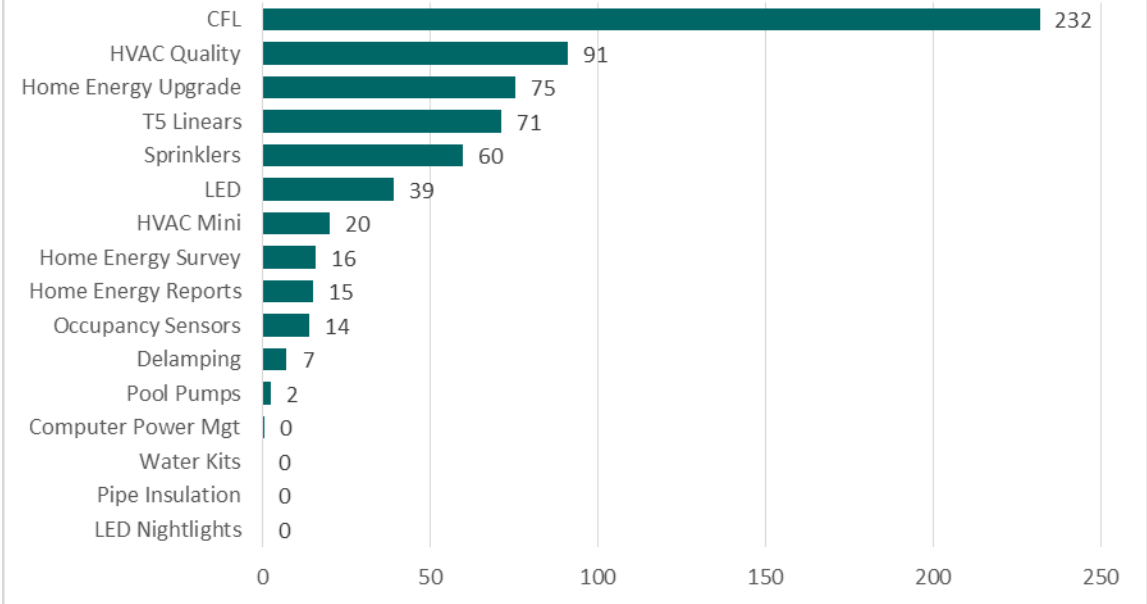
**c. Key Drivers of Evaluation Updates – Largest ESPI Deemed Ex-Post Measures**

The following charts show the rank of the deemed uncertain measures and their contribution to statewide lifecycle electric, demand, and natural gas ex-post savings. CFLs continue to be a significant portion of the portfolio in 2014, contributing the most to lifecycle GWh and MW for 2014 ESPI purposes. Water Kits were the largest contributor for lifecycle therms savings (again, this is within the 2014 ESPI deemed ex-post uncertain measure savings and does not include therms savings from codes & standards, ESPI custom ex-post or ESPI deemed ex-ante savings incentive).

### Life Cycle Net GWh - ESPI Deemed Measures

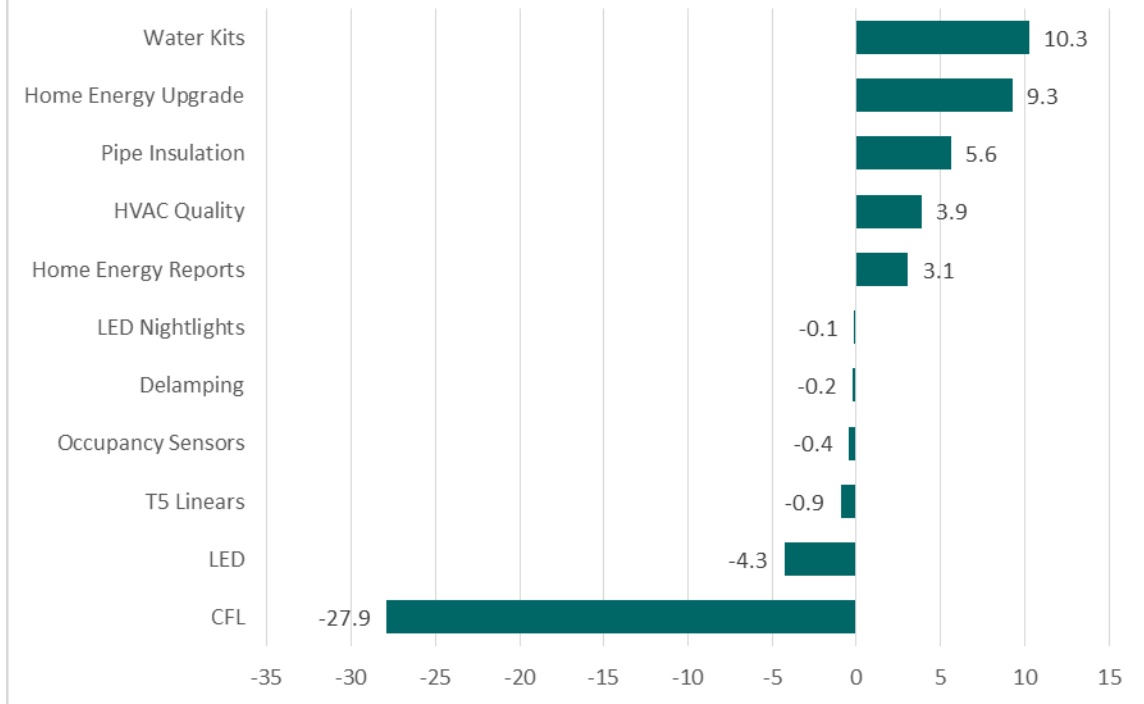


### Life Cycle Net MW - ESPI Deemed Measures





### Life Cycle Net MM Therms - ESPI Deemed Measures



## 7. Appendices

### **Appendix A. 2014 Performance Statement Workbook**

All the tables and charts used in this report can be found in the workbook embedded in Appendix A. In addition, IOU specific workbooks are posted at <http://www.cpuc.ca.gov/General.aspx?id=4137> under the heading “2014 Ex-Post ESPI”.

### **Appendix B. 2014 ESPI Database**

All the measure level data and queries used to build the tables in Appendix A can be found in the database linked to in Appendix B.

### **Appendix C. Creation of Ex-Post Data**

Appendix C includes more detail on how the impact evaluation updates were implemented in the database.

### **Appendix D. Adjustments to Ex-Ante Savings Incentive**

Appendix D provides a detailed explanation of the adjustments made to and the earnings values for the 2014 ESPI ex-ante savings incentive.

### **Appendix E. Home Energy Reports**

Appendix E provides an explanation for the adjustments made as a result of the Home Energy Report evaluation.

### **Appendix F. Response to Parties Comments on Draft Report**

Appendix F provides each public comment and the Commission Staff response.

More detail about each appendix is provided in the actual appendix.

## 2014 Ex-Post Efficiency Savings and Performance Incentive (ESPI) Mechanism

### **Appendix A: 2014 Performance Statement Workbooks**

The 2014 ESPI workbooks can be found at:

<http://www.cpuc.ca.gov/general.aspx?id=4137>

The embedded workbook below was used to create all results tables and graphs presented in this report. This embedded workbook includes the statewide results. These are presented separately from IOU-specific results (available via the link above), giving rise to five workbooks in total. Each workbook contains results data by Scenario, PA, ESPI Group, ESPI Category, Uncertain Measure, having Evaluation Results, Measure Group, and RoadMap ID. The results include Record Counts, Quantities, and Gross and Net First Year and Life Cycle Savings. The subsequent tables and charts are derived from this data.

The workbooks contain tables and graphs not available in the report. These are provided to allow the reader to interpret the results at a finer level of detail.



ESPI\_2014\_Results\_T  
ables\_SW.xlsx

## 2014 Ex-Post Efficiency Savings and Performance Incentive (ESPI) Mechanism

### Appendix B: 2014 ESPI Database

The 2014 ESPI databases are located at the following URL:

<http://www.cpuc.ca.gov/general.aspx?id=4137>

Each IOU has a specific database, which includes a table with the detailed claim level data. For each record, the ex-ante savings (“ExAnte”) values, ex-ante savings incentive savings values as paid in Resolution G-3510<sup>7</sup> (“EARAdj”), ex-ante savings incentive savings values<sup>8</sup> after record level reconciliation (“EARRec”), impact evaluation savings values<sup>9</sup> (“Eval”), and ex-post savings incentive savings (“ESPIExPost”) <sup>10</sup> savings values (including gross and net, first year and life cycle) are available. In addition, the parameter level data is included for ex-ante and evaluation ex-post savings fields as these are the basis for all savings fields. This database table is the basis for this report and the aggregated data presented in the Excel file in Appendix A.

The queries included in this database serve multiple purposes. Some are meant to verify and provide transparency towards the savings and records used originally as part of Resolution G-3510 for 2014 ESPI ex-ante. Others were developed to verify that the data in the database match the aggregated data in the Excel file (included in Appendix A) which was then used to produce all tables and graphics in this report. Finally, a number of queries are provided that created the Impact Evaluation Standardized Reporting appendices found in the 2014 ESPI Impact Evaluation reports. The Database Contents file below provides information detailing the contents of each query and identifies the matching Excel tables or appendix.



2014ESPI\_Database  
Contents.docx

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<sup>7</sup> EARAdj values are zero for records not paid as part of Resolution G-3510 for the 2014 ESPI Ex-Ante Savings Incentive.

<sup>8</sup> EARRec values are only non-zero for records determined after reconciliation to be part of the 2014 ESPI Ex-Ante Savings Incentive.

<sup>9</sup> Eval savings values are filled in for all records. If the record was passed through, Ex-Ante values are used. These fields contain impact evaluation results even if the record is not a part of the 2014 ESPI uncertain measure list.

<sup>10</sup> ESPIExPost values for ESPI Deemed Ex Ante and Codes & Standards records are zero and contain the values from the Eval savings fields otherwise.

2014 Ex-Post Efficiency Savings and Performance Incentive (ESPI) Mechanism  
**Appendix C: Creation of Ex-Post Dataset**

**Claim Data**

The utility energy efficiency program tracking data forms the basis for critical program reporting functions and for evaluation sampling and execution. The cumulative 2014 Q1 – 2014 Q4 quarterly tracking claim data subset for 2014 is the foundation for the values in this report.

*Claim Submission Processing*

The following steps were followed to process the program tracking data in preparation for ESPI 2014:

1. Receive FTP link to download data from IOUs
2. Write IOU data together into standardized tables
3. Clean data and create “EDFilled” table
4. Quality check the data submission
5. Post IOU data submissions and “EDFilled” table onto ED Central Server (EDCS) and into SQL Server database

*Data Cleaning*

Although the IOU claims have continuously improved from quarter-to-quarter and cycle-to-cycle, the central data set still required some level of data cleaning to enable processing through the cost effectiveness tool. The CPUC evaluation contractors in conjunction with IOU staff cleaned data elements necessary for evaluation. Throughout the cycle, the amount of data cleaning necessary was continuously reduced as IOUs improved their reporting capabilities. The result of the data cleaning process was a table named “EDFilled,” which contains all cleaned ex-ante IOU data necessary for evaluation teams.

*Validation and Quality Control*

The main component of the Energy Division’s data cleaning process was a quality control algorithm. All quality control algorithms were communicated to the IOUs via the Data Transfer Tool, an Access file that the PAs use to transfer their quarterly tracking data to the ED and QC their own data before transferring. The end product was a clean, consistent data set of claims which were ready for evaluation sampling and update.

**Evaluation Data**

Evaluation data provided in the final 2014 ESPI impact evaluation reports form the basis for ex-post updates for this report. Evaluation data is reported by evaluation teams. For 2014 ESPI, the evaluation teams provided claim-level results for each parameter and savings value. These fields are identifiable in the 2014 ESPI database by the prefix “Eval.” The evaluation results are discussed in detail in the 2014 ESPI impact evaluation reports.<sup>11</sup>

#### *Evaluation Data Processing*

The following steps were followed to process the evaluation data in preparation for ESPI 2014:

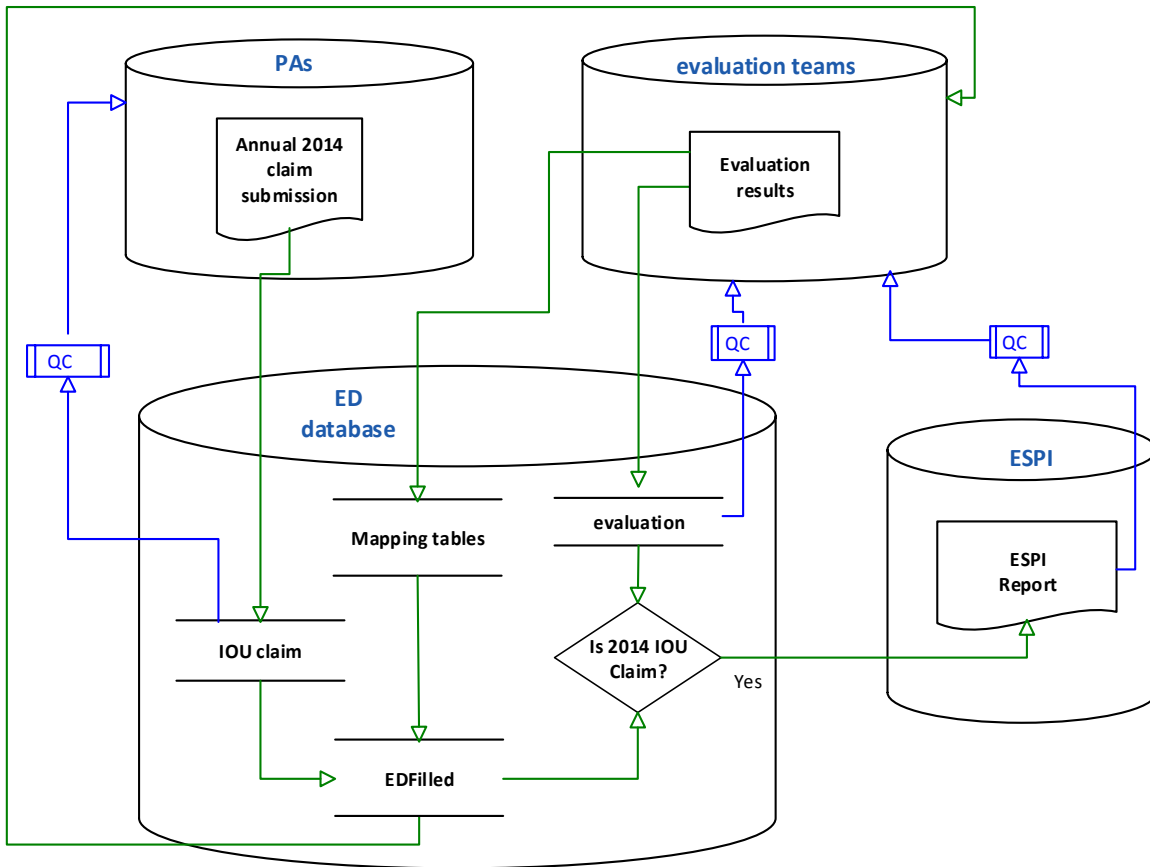
1. Post impact evaluation report specific databases to Smartfile for evaluation teams
2. Evaluation team posts filled out claim level evaluation data submission to Smartfile
3. Bring evaluation data into SAS
4. Quality check individual data submissions and iterate with evaluation teams
5. Read together all evaluation results and create 2014 ESPI access databases

The following graphic provides a high level overview of the processing of claim level data from the IOU submissions, to creating *EDFilled*, to adding evaluation results and reading out information for the purposes of the 2014 ESPI Savings Incentives.

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<sup>11</sup> <http://www.energydataweb.com/cpuc/search.aspx>

Figure 2: Claims Processing



### Evaluation Decision Framework

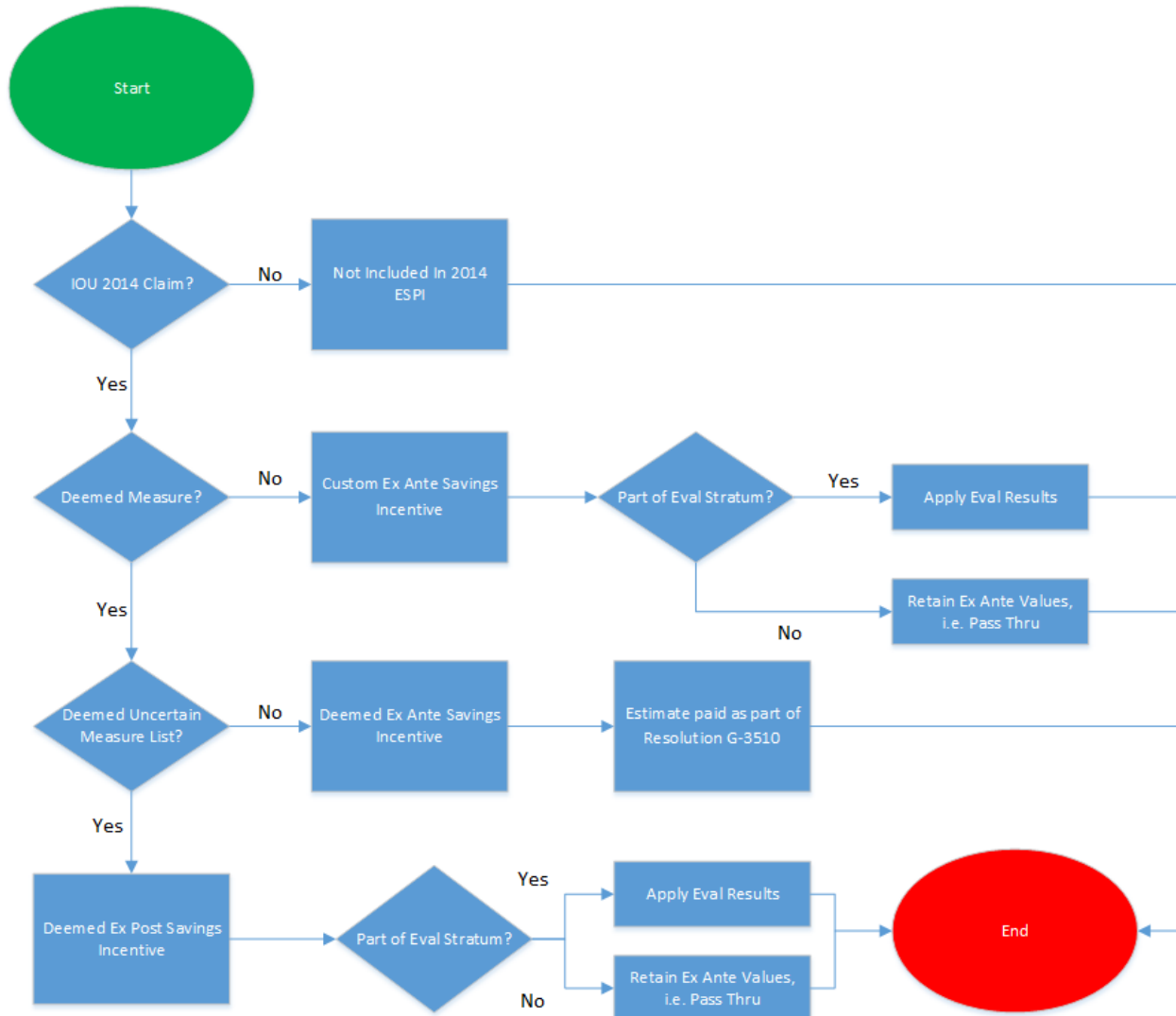
Commission staff utilized the detailed quarterly tracking data, described in the prior section, as the foundation for prioritizing evaluation activities and applying updates from evaluation work. The ex-post 2014 ESPI impact evaluation reports carried out Commission staff's guidance to make updates to the claims on a parameter basis. Commission staff and evaluation contractors utilized the following options in making updates to the utility savings claims for the aforementioned parameters:

1. Pass through: Accept reported savings values for claims that do not fall within the frame of an impact evaluation (no change); or
2. Apply results from the 2014 impact evaluation studies: Apply stratum-level results to records included in the frame of an impact evaluation.

### Evaluation Decision Tree

The decision tree in the following figure illustrates how Commission Staff partitioned IOU claims for the purposes of resource program savings incentive earnings based upon section 7 of D.13-09-023.

**Figure 3: Evaluation Framework Decision Tree**



The evaluation teams submitted the ESPI 2014 evaluation results in the form of impact evaluation reports. Each ESPI report followed the public review process, and the final numbers were provided to the data reporting team. Evaluation results were downloaded and processed into the CPUC contractor’s local server and applied to claims in the custom and deemed ex-post



savings incentive groupings of claims. For the 2014 ESPI evaluation results, there were two phases, which differ slightly from those in 2013 ESPI.

The first phase consisted only of partitioning the claims by impact evaluation report. Each claim was first identified with a RoadMap ID and each RoadMap lead was asked to group claims into evaluation reports, the result of which is stored in the EvalReportName field.<sup>12</sup> In the second phase, each impact evaluation report team then received a Microsoft Access database with ex-ante information and blank results fields to fill out with claim level results.

The data reporting team worked closely with each evaluation team to help maintain consistency in claim level reporting. The report specific Microsoft Access databases were then returned to the data reporting team. Each report was put through an extensive quality check routine and any issues or discrepancies were reported to the evaluation teams for review and updates. Once claim level results were finalized with draft impact evaluation information, all evaluation reports were combined. Finally, IOU 2014 claims were subset for the 2014 ESPI database.

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<sup>12</sup> Claims not associated with any impact evaluation report were assigned to a report name with a prefix of the RoadMap ID and suffix of “\_None.”

2014 Ex-Post Efficiency Savings and Performance Incentive (ESPI) Mechanism  
**Appendix D: Adjustments to Ex-Ante Savings Incentive**

As noted briefly above, there are differences in the ex-ante savings incentive earnings estimates presented in this memo compared to the earnings from Resolution G-3510. The tables below present the two sets of estimates.

**Table 4 – Proposed 2014 Ex-Ante Savings Incentive Earnings by Utility – Resolution G-3510**

	kWh Earnings	kW Earnings	Therms Earnings	Total
PG&E	\$2,979,500	\$1,134,600	\$853,240	\$4,967,340
SCE	\$4,507,125	\$2,182,400		\$6,689,525
SCG			\$767,916	\$767,916
SDG&E	\$1,350,875	\$582,800	\$42,662	\$1,976,337
<b>Total Statewide</b>	<b>\$8,837,500</b>	<b>\$3,899,800</b>	<b>\$1,663,818</b>	<b>\$14,401,118</b>

**Table 5 – Proposed 2014 Ex-Ante Savings Incentive Earnings by Utility – Dated Jun 15, 2016**

	kWh Earnings	kW Earnings	Therm Earnings	Total
PG&E	\$2,851,182	\$1,158,831	\$879,865	\$4,889,878
SCE	\$4,279,919	\$2,030,700		\$6,310,618
SCG			\$768,137	\$768,137
SDG&E	\$1,350,277	\$622,951	\$48,450	\$2,021,678
<b>Total Statewide</b>	<b>\$8,481,378</b>	<b>\$3,812,481</b>	<b>\$1,696,453</b>	<b>\$13,990,312</b>

**Overview of Changes**

There are two key reasons for the differences between the ex-ante savings incentive earnings estimates between Resolution G-3510 and this current memo. These are each explained in more detail below, and further tables are also contained in the “Earnings\_Detail\_PrelimExAnte” tab in the accompanying workbook<sup>13</sup>. The two key reasons are:

<sup>13</sup> This workbook is embedded in Appendix A and can be found at <http://www.cpuc.ca.gov/general.aspx?id=4137>

1. Reconciliation of record classification into custom ex-post, deemed ex-post and ex-ante savings incentive groupings.
2. Application of impact evaluation ex-post installation rates for evaluated deemed measures not included on the 2014 ESPI uncertain measure list<sup>14</sup>.

### **Reconciliation of record classification**

This effort concerns Figure 3 from above and the three questions posed in the first column of this figure. These three questions concern the year of the claimed savings, whether the savings was claimed as deemed or calculated, and whether or not the measures associated with the claim is listed on the 2014 ESPI uncertain measure list. The tracking data was not yet finalized at the time the analysis was performed for the ex-ante savings incentive included in Resolution G-3510. As a result, there were claims (tracking data line item) in two major groups needing reclassification:

1. Claims in both the ex-ante savings incentive in Resolution G-3510 that are now included in the deemed ex-post savings incentive (covered under this report).
2. Claims not included in the ex-ante savings incentive in Resolution G-3510 that are also not included in the deemed ex-post savings incentive in the report.

If the reconciliation had not been completed, it would have resulted in some claims being included as part of both payments and other not being included in any payment. The evaluation teams in coordination with the Ex-Ante Team and the CPUC reviewed the claim assignments and determined the appropriate placement for each. The CPUC and its contractors have already set up a process to ensure future overlapping claims are further minimized by finalizing the mapping exercise prior to the ex-ante review process.

Those claims of Type 1 above result in a decrease in savings to the ex-ante savings incentive earnings; however these same claims are now included in the ex-post savings incentive earnings. These direct decrease in ex-ante earnings and the ex-post earnings for the same claims is provided in the tables below.

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<sup>14</sup> See page 51 of D.13-09-023: <http://docs.cpuc.ca.gov/PublishedDocs/Published/G000/M076/K775/76775903.PDF>

**Table 6 – Type 1 Claims – Earnings Decreases to Ex-Ante Savings Incentive\***

	kWh Earnings	kW Earnings	Therms Earnings	Total
<b>PG&amp;E</b>	-\$632,037	-\$231,274	\$73,975	<b>-\$789,336</b>
<b>SCE</b>	-\$261,316	-\$184,322		<b>-\$445,638</b>
<b>SCG</b>			-\$7,625	<b>-\$7,625</b>
<b>SDG&amp;E</b>	-\$50,198	-\$10,227	-\$9,041	<b>-\$69,466</b>

*\*Negatives indicate that amount was removed from ex-ante savings incentive earnings.*

**Table 7 – Type 1 Claims – Earnings included in Ex-Post Savings Incentive**

	kWh Earnings	kW Earnings	Therms Earnings	Total
<b>PG&amp;E</b>	\$646,738	\$273,016	-\$75,525	<b>\$844,230</b>
<b>SCE</b>	\$202,124	\$164,054		<b>\$366,179</b>
<b>SCG</b>			\$16,899	<b>\$16,899</b>
<b>SDG&amp;E</b>	\$8,946	-\$1,276	\$1,747	<b>\$9,417</b>

These values indicate the differences on the same collection of records between that which was paid under Resolution G-3510 as part of ex-ante savings incentive earnings and what will be paid following this report as part of the ex-post savings incentive earnings.

The claims of type 2 consisted of claims that either did not exist at the time of the analysis for Resolution G-3510 or were thought to be part of the 2014 ESPI uncertain measure list based upon available information, but later determined not to be. As a result, earnings for these claims was not paid as part of the aforementioned resolution and as such provide an offsetting increase to ex-ante savings incentive adjusted earnings. These increased earnings are provided in the following table.

**Table 8 – Type 2 Claims – Earnings Added to Ex-Ante Savings Incentive\***

	kWh Earnings	kW Earnings	Therms Earnings	Total
<b>PG&amp;E</b>	\$503,719	\$255,504	-\$47,349	<b>\$711,874</b>
<b>SCE</b>	\$34,109	\$32,622		<b>\$66,731</b>
<b>SCG</b>			\$7,846	<b>\$7,846</b>
<b>SDG&amp;E</b>	\$49,600	\$50,378	\$14,829	<b>\$114,807</b>

*\* Values based on savings values that include the application of evaluation installation rate discussed in the next section.*

The sum of the values in the *Total* columns of Table 6 and Table 8 provides the overall *Adjusted Ex-Ante Review Earnings* column of Table 1. Table 7 is included to demonstrate that earnings for the claims removed from ex-ante savings incentive earnings provided in Resolution G-3510 are now being given under the ex-post savings incentive.

### Application of Installation Rates

Paragraph 2 of Section 7.3 of D.13-09-023 directs that, where available, impact evaluation results for measure counts or installation rate should be applied to ex-ante savings incentive records for calculating ESPI earnings. These install rates were not available at the time Resolution G-3510 was released and as such the application of such installation rates necessarily comes as part of the ex-ante savings incentive adjustments made as part of this report.

Some impact evaluations studied measures not included in the 2014 ESPI uncertain measure list. These results are included in the 2014 ESPI database along with all other 2014 ESPI impact evaluation results. After the reconciliation described previously, savings was recalculated for each claim determined to be a part of the ex-ante savings incentive using all IOU reported parameter values, save the installation rate. In the place of the IOU reported installation rate, the impact evaluation installation rate was used, which, in the case of a passed through claim, would contain the IOU reported value. Using field names from the 2014 ESPI database the formula for net lifecycle kWh<sup>15</sup> savings is as follows:

If  $RUL > 0$  then

$$EARRecLifecycleNetkWh = EvalIRkWh \cdot Quantity \cdot RRkWh \cdot NTGRkWh \\ \cdot (RUL \cdot UESkWh + (EUL - RUL) \cdot UESkWh_{ER})$$

Otherwise,

$$EARRecLifecycleNetkWh = EvalIRkWh \cdot Quantity \cdot RRkWh \cdot NTGRkWh \cdot EUL \cdot UESkWh$$

The database in its current form does not explicitly include fields housing ex-ante savings incentive savings values that do not include this evaluation installation rate application. However, we provide in the following two tables the effect of this application. The first table shows earnings for the ex-ante savings incentive following the reconciliation performed above, but without applying the evaluation installation rates. The second table shows the same, but with the evaluation installation rates applied.

---

<sup>15</sup> kW and therms savings are calculated similarly, with the appropriate changes to unit specific parameters.

**Table 9 – Ex-Ante Savings Incentive Earnings – IOU Reported Installation Rates**

	kWh Earnings	kW Earnings	Therms Earnings	Total
<b>PG&amp;E</b>	\$2,851,182	\$1,158,831	\$879,865	<b>\$4,889,878</b>
<b>SCE</b>	\$4,341,277	\$2,058,992		<b>\$6,400,268</b>
<b>SCG</b>			\$768,137	<b>\$768,137</b>
<b>SDG&amp;E</b>	\$1,388,835	\$637,370	\$47,664	<b>\$2,073,869</b>

**Table 10 – Ex-Ante Savings Incentive Earnings – Final Proposed – Dated Jun 15, 2016**

	kWh Earnings	kW Earnings	Therms Earnings	Total
<b>PG&amp;E</b>	\$2,851,182	\$1,158,831	\$879,865	<b>\$4,889,878</b>
<b>SCE</b>	\$4,279,919	\$2,030,700		<b>\$6,310,618</b>
<b>SCG</b>			\$768,137	<b>\$768,137</b>
<b>SDG&amp;E</b>	\$1,350,277	\$622,951	\$48,450	<b>\$2,021,678</b>

2014 Ex-Post Efficiency Savings and Performance Incentive (ESPI) Mechanism

**Appendix E: Home Energy Reports**

This addendum outlines the updates to 2014 ESPI DRAFT earnings as a result of the Energy-Efficiency resource program measure identified by Home Energy Reports (HER). This measure is sometimes referred to by, the largest implementing company, OPower. This addendum directly affects the earnings values for the utilities: PG&E, SCE and SDG&E.

The following table provides a summary of the effects on the total new payment for 2014 ESPI. The first column contains total earnings, including the effects of the ex-ante savings incentive true up, as provided in Table 1 of the 2014 ESPI DRAFT Performance Statement Report. The second column shows the portion of the ex-post savings incentive earnings that was coming from HER savings in the DRAFT. Next, the updated total earnings for 2014 HER is provided and a column outlining the net change. Finally, the resulting proposed total new earnings are provided<sup>16</sup>.

**Table 11 – Summary of Updated Earning due to Home Energy Reports Adjustments**

	<b>June 15th DRAFT - Total</b>	<b>June 15 HER Earnings</b>	<b>Updated HER Earnings</b>	<b>Net Change - HER*</b>	<b>Total New Earnings</b>
<b>PG&amp;E</b>	\$13,547,879	\$407,346	\$480,295	\$72,949	<b>\$13,620,828</b>
<b>SCE</b>	\$11,383,477	\$39,014	\$14,660	-\$24,354	<b>\$11,359,122</b>
<b>SCG</b>	\$2,030,067	\$0	\$0	\$0	<b>\$2,030,067</b>
<b>SDG&amp;E</b>	\$1,970,752	\$0	\$12,255	\$12,255	<b>\$1,983,006</b>
<b>Total Statewide</b>	<b>\$28,932,174</b>	<b>\$446,360</b>	<b>\$507,210</b>	<b>\$60,849</b>	<b>\$28,993,024</b>

\* Change reflects changes to proposed earnings only and is not a reflection of HER savings performance.

For each utility, there are many differences in how 2014 HER savings was reported and how HER was included as part of the 2014 ESPI DRAFT Performance Statement Report. For this reason, the treatment of each utility is provided separately.

*PG&E*

The measure “Home Energy Reports” is listed in D.13-09-023 as an uncertain measure for PG&E as part of the 2014 program implementation year. Additionally, PG&E reported savings on a quarterly basis in 2014 for HER.

<sup>16</sup> These amounts are prior to the \$39K reduction to PG&E as explained on page 2.

As part of the DRAFT Performance Statement, these quarterly claims were included as part of the ex-post Savings Incentive using the PG&E reported savings values. Ex-post Savings Incentive values now use evaluated findings as provide in the report “Review and Validation of 2014 Pacific Gas and Electric Home Energy Reports Program Impacts (Final Report).”<sup>17</sup> The following table demonstrates the changes for electricity, demand and natural gas.

**Table 12 – Lifecycle Net Ex-Post Savings from 2014 Home Energy Reports – PG&E**

	kWh	kW	therm
<b>June 15 DRAFT Report</b>	90,483,862	15,125	3,080,174
<b>Final</b>	107,703,778	19,534	3,017,243

*SCE*

The measure “Home Energy Reports” is not on the 2014 ESPI uncertain measure list for SCE. SCE claimed savings for HER in the 2014 claim level data. However, these reported savings represent the ex-post savings values found in the report “Review and Validation of 2013 Southern California Edison Home Energy Reports Program Impacts; ED Res 3.2.”<sup>18</sup> The commission reads D.13-09-023 to indicate that earnings paid as part of 2014 ESPI should be based upon savings created by resource programs implemented during the program year 2014.

The 2013 ex-post savings values reported in 2014 were mistakenly included in the DRAFT Performance Statement Report savings and earnings values. The database, savings and earnings for SCE are updated now to reflect the savings values found in “Review and Validation of 2014 Southern California Edison Home Energy Reports Program Impacts (Final Report).”<sup>19</sup> The following table demonstrates the changes for electricity, demand and natural gas.

**Table 13 – Lifecycle Net Ex-Post Savings from 2014 Home Energy Reports – SCE**

	kWh	kW	therm
<b>June 15 DRAFT Report*</b>	8,264,975	2,627	NA
<b>Final</b>	3,496,345	828	NA

<sup>17</sup> [http://www.calmac.org/publications/DNVGL\\_PGE\\_HERs\\_2014\\_FINAL.pdf](http://www.calmac.org/publications/DNVGL_PGE_HERs_2014_FINAL.pdf)

<sup>18</sup> [http://www.calmac.org/publications/DNVGL\\_SCE\\_HERs\\_2013\\_FINAL\\_20150421.pdf](http://www.calmac.org/publications/DNVGL_SCE_HERs_2013_FINAL_20150421.pdf)

<sup>19</sup> [http://www.calmac.org/publications/DNV\\_GL\\_SCE\\_HERs\\_2014\\_FINAL.pdf](http://www.calmac.org/publications/DNV_GL_SCE_HERs_2014_FINAL.pdf)



\* Values based on 2013 ex-post savings reported in 2014

### SDG&E

The measure “Home Energy Reports” is not on the 2014 ESPI uncertain measure list for SDG&E and SDG&E claimed no savings for HER in the 2014 claim level data. Since no savings were reported in the claim level data, the DRAFT Performance Statement report did not include any savings or earnings for SDG&E 2014 HER. However, there are 2014 ex-post savings values for SDG&E HER measures as provided in the report “Review and Validation of 2014 San Diego Gas and Electric Home Energy Reports Program Impacts (Final Report).”<sup>20</sup> These savings values are added to the database and are now included in the updated savings and earnings values as demonstrated in the following table.

**Table 14 – Lifecycle Net Ex-Post Savings from 2014 Home Energy Reports – SDG&E**

	<b>kWh</b>	<b>kW</b>	<b>therm</b>
<b>June 15 DRAFT Report</b>	0	0	0
<b>Final</b>	3,574,754	0	123,998

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<sup>20</sup> [http://www.calmac.org/publications/DNVGL\\_SDGE\\_HERs\\_2014\\_FINAL.pdf](http://www.calmac.org/publications/DNVGL_SDGE_HERs_2014_FINAL.pdf)

2014 Ex-Post Efficiency Savings and Performance Incentive (ESPI) Mechanism

**Appendix F: Response to comments on Draft report**

PA	Comment or Question:	Response
PG&E	<p>The Database appears to contain some measure codes for a particular measure group that do not roll up to the same ESPI group, as we would expect. In particular, about 25 measures in the ATR2014_PGE_20160505 dataset were in two distinct ESPI Groups. For example, measure codes 0L38, CAC00, and R217, among others were in multiple groups</p>	<p>The examples given appear to be a result of the manner in which claims for these measures were reported. Those reported in the "Custom Measure Table" are part of "ESPI_Custom" while the others are either part of "Prelim_ExAnteDeemed" or "ESPI_Deemed". Review of multiple ESPI Groups for a single measure code will be added to the review process for 2015 ESPI.</p>
PG&E	<p>Similar to above, some 'like' measures currently reside in multiple ESPI Groups, which should not occur. For example, LED HIGH/LOW BAYS: LD113 is in 'ESPI_Deemed', while the rest of the LD*** measures are in 'Prelim_ExAnteDeemed'.</p>	<p>LD113 was mistakenly marked as "ESPI_Deemed" and not caught during review. We have decided not to make this specific change for 2014 ESPI. The <i>ESPI_Group</i> for LD113 has been set to "Prelim_ExAnteDeemed" for 2015 ESPI.</p>
PG&E	<p>PG&amp;E found inconsistencies between the ESPI database and the original ex ante claims for some important parameters. For example, the ex ante UES and EUL values for the LED HIGH/LOW BAYS for ProgramID PGE21022 in the ESPI database differ compared to the original PG&amp;E ex ante claim.</p>	<p>LED HIGH/LOW BAYs were reviewed and the UES, EUL, RUL, etc values in the ESPI database match the values reported in PG&amp;E's EE Program Tracking data submissions from the databases named (date received) below, where information is used from the most recent submission if the claim occurs in multiple submissions:</p> <p>IncrUpdAR2014_DEEMED_CLAIM_1.accdb (9/15/2015)            RevAR2014_DEEMED_CLAIM_1.accdb (6/1/2015)            RevAR2014_DEEMED_CLAIM_2.accdb (6/1/2015)            RevAR2014_DEEMED_CLAIM_3.accdb (6/1/2015)            AR2014_DEEMED_CLAIM_1.accdb (5/1/2015)            AR2014_DEEMED_CLAIM_2.accdb (5/1/2015)            AR2014_DEEMED_CLAIM_3.accdb (5/1/2015)</p>

PA	Comment or Question:	Response
PG&E	<p>The current Database does not include NTG_ID. Adding this field from the Claim Table would enable PG&amp;E to identify claims associated with schools, locational, and Hard-to-Reach areas. Understanding where these NTG values were claimed, where they were evaluated, and where adjustments were made by the Ex Ante Team would help us verify results and provide more information where needed. If the NTG_ID cannot be added for 2014, we recommend that it is included in future years.</p>	<p>We will add the NTG_ID field for 2015 ESPI. For 2014, the <i>ClaimID</i> is a key field for linking the ESPI Database to any and all other EE Program Tracking data tables - as such NTG_ID could be attached to the ESPI Database.</p>
PG&E	<p>The waterfall graphics on Report pages 13 – 15 provide a useful comprehensive view of the statewide portfolio savings and ex ante/ex post discrepancies. However, as noted in the report, the waterfall steps are pathway dependent, meaning that if one altered the order in which the steps are displayed, their values would also change. This creates a distorted visual that can be misleading. We recommend completing the waterfall graphics using a waterfall methodology that normalizes the waterfall steps in an accurate and order-independent way; Appendix A references a method and online resources available to do so. PG&amp;E also suggests that the waterfalls would be most useful if the exact savings values and adjustments were listed in the figures for each step, or if tables were included to provide that information.</p>	<p>We have read the referenced paper and reviewed the possibility of using this tool for 2014 ESPI waterfall graphics. This method seems as though it would provide more clarity into parameter updates, but have determined that given the complexities of implementation it would be best to work towards this for 2015 ESPI.</p>

PA	Comment or Question:	Response
SCG	<p>SoCalGas believes that the “Water Saver Kit Measures Review” conducted by the Energy Division failed to accomplish the Commission’s directive in Decision (D.) 13-09-023, which states the following for water savings kits/items:  “Energy impacts of this measure not subject to previous evaluation and assumption are uncertain; uncertain install rate and level of free riders.”<sup>1</sup>  1 D.13-09-023, Attachment 3, pg. 5.</p> <p>The energy savings assumptions, installation rates, and net to gross values were not subject to an Evaluation, Measurement, and Verification (EM&amp;V) study, but instead were validated against the Energy Division Work Paper Disposition for Water Fixtures, released on February 22, 2013. The water savings kit measures remain on both the 2015 and 2016 Uncertain List, thereby rendering more resources being spent on this set of measures, despite the fact that the 2013 and 2014 program evaluations should have confirmed the cost-effectiveness parameters. SoCalGas proposes that a measure should not remain on an Uncertain List for more than two years, should the Energy Division not wish to conduct an evaluation in that time, the measure should be “passed through” and removed from the Uncertain List. Continuing to render an uncertain designation to a measure precludes the program administrator from properly allocating resources and working with customers to procure the maximum amount of cost-effective energy efficiency.</p> <p>Since an EM&amp;V study was not conducted to validate energy savings and installation rates, then the installation rate for direct install applications of water saving items should be set to one. As part of the program rules, SoCalGas ensures that the showerheads and faucet aerators were actually installed; therefore, no installation rate is warranted. The programs that would be affected are: SCG3761- 3P-MF Home Tune-Up; SCG3763- 3P-MF Direct Therm Savings; and SCG3765- 3P- Manufactured Mobile Homes.</p>	<p>This Performance Statement report uses the values from the reports released and publicly vetted in March 2016 and finalized in April. The Final Report of ESPI Water Saver Kit Memo posted on 4/1/2016 contains that values that Staff used for this report. With respect to the proposal to remove this measure from the uncertain measure list, Commission Staff will consider this suggestion in the next round of studies.</p>

**ATTACHMENT B**

**Advice No. 5024**

**Energy Division Submittal Instructions**

## Hanway, Darren M

---

**From:** Mozafari, Maryam <Maryam.Mozafari@cpuc.ca.gov>  
**Sent:** Monday, August 01, 2016 2:42 PM  
**To:** Hanway, Darren M  
**Cc:** Kloberdanz, Kari  
**Subject:** [EXTERNAL] FW: ESPI Guidelines for IOUs Sep 01, AL Submission  
**Attachments:** 2015\_ESPI\_Ex-Ante\_and\_MngFee\_Template 08.01.2016.xlsx

Hello Darren,

The below email to Mark Harvey has bounced back. Could you please route it to the right contact at SCG?

Thanks,  
Maryam

*Maryam Mozafari | Energy Policy Analyst | Energy Division, CPUC | [MM5@cpuc.ca.gov](mailto:MM5@cpuc.ca.gov) | 415-703-2126*

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**From:** Mozafari, Maryam  
**Sent:** Monday, August 01, 2016 2:05 PM  
**To:** 'MKDC@pge.com'; 'Anuj Desai'; 'ABesa@semprautilities.com'; 'MJHervey@semprautilities.com'  
**Cc:** Wu, Katie; Skala, Pete  
**Subject:** ESPI Guidelines for IOUs Sep 01, AL Submission

Dear IOU EE Managers,

In order to streamline the data submission and standardize a uniform process across utilities, please find the attached guidelines for the Sep 01, ESPI advice letter.

Please let me know if you have any questions,

Thanks,  
Maryam

Maryam Mozafari  
Regulatory Analyst | Energy Division | California Public Utilities Commission (CPUC)  
[Maryam.Mozafari@cpuc.ca.gov](mailto:Maryam.Mozafari@cpuc.ca.gov) | 415.703.2126

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This email originated outside of Sempra Energy. Be cautious of attachments, web links, or requests for information.

- A IOUs must submit One AL for all four components of the ESPI.
- B Below table must be placed on the first page of each IOU's AL (purpose section)

Component	Award
2014 Ex-Post Savings	
2014 Ex-Ante Savings True Up	( )
2015 Ex-Ante Savings	
2015 Ex-Ante Review Performance	
2015 Codes & Standards	
2014 Codes & Standards True Up	( )
2015 Non-Resource	
2014 Non-Resource True Up	( )
<b>Total Award</b>	

- C IOUs must use 2015\_ESPI\_Ex-Ante\_and\_MngFee\_Template as a template for their filing.
- D All references for the Sep 01 AL filings can be found on the CPUC's ESPI website  
<http://www.cpuc.ca.gov/General.aspx?id=4137>

- E For ESPI payment purposes IOUs must ONLY report claims on funds spent in 2015 that are included in the 2015 authorized budget (and must exclude all funds reported as spent in previous years and all committed expenditures for activities in future years).

Example	Include in 2015 ESPI Claim?
IOU signs contract in 2014 (from 2014 budget) for 2015 payment	No*
IOU signs contract in 2014 (from 2015 budget) for 2015 payment, NOT included in 2014 ESPI claims	Yes
IOU signs contract in 2015 (from 2015 budget) for 2015 payment	Yes
IOU signs contract in 2015 (from 2015 budget) for Post-2015 payment/invoicing	No

\* Exception for 2015: only if not included in 2014 ESPI payment requests. Going forward expense claims and payments must be aligned.

- F Expenditures that are reported this year as the basis for ESPI payments or limits/caps MUST NOT be included in previous or future year ESPI payment request filings

The individual 2015 claims records must be rolled up into summed records for unique combinations of values for the below listed fields.

Column (field) Name	Description of column (field) content
PA	
SubProgramID	(these are always paired but are to be placed in separate columns; only official IDs and names are to be used, these are specific subprogram IDs and Names not the higher level - Residential, Industrial, 3P, LGP, etc. - IDs and Names)
SubProgramName	
MeasAppType	(one of the following: ROB, NC, ER or RET, REA used to determine the baseline and applicability or EUL and RUL)
MeasureName	(must match the name used in 2015 claims)
Sector	(must be one of: Res, Ind, Com, Ag to represent the sector of the facility of the claim)
Bldg Type	(there were not included in 2015 - for PY2014 - analysis but are to be included in 2016 - for PY 2015 - analysis, there must be DEER or other approved bldg types and vintages and only
Vintage	CZ01 thru CZ16 or "IOU")
Climate Zone	
EUL	
RUL	Only applicable for ER/RET and REA measures, and for ER/RET measure indicates a 2nd period baseline may be utilized)
NTG kWh/kW	
NTG therm	(some claims may - but rarely - have different NTG for electric and gas components)
IR (install rate)	
RR (realization rate)	
DeemedFlag	1 if this is a deemed value, otherwise 0
UpstreamFlag	1 if this was delivered via an upstream program, otherwise 0
EUCFlag	1 if this is a Advanced Home Upgrade or Home Upgrade claim (formally EUC), otherwise 0
ClaimYearQuarter	(of the format YYYYQQ, YYYY is always 2015 whereas QQ is one of Q1, Q2, Q3 or Q4)
ESPI Group	(one of three possible values must always be supplied: Deemed Uncertain, Deemed Certain, custom)

The rolled up 2015 claim records used to produce each row in the "2015\_ESPI\_Ex-Ante\_Savings" tab must have summed values for each of the fields listed below.

Column (field) Name	Description of column (field) content
install count	(sum of installs across all rolled up claims in this row)
record count	(number of claim records contained in this sum row)
Gross Summed kWh	
Gross Summed kW	(first year gross savings before adjustments for installation rate (IR) or Realization Rate (RR))
Gross Summed therm	
IR*RR Summed kWh	
IR*RR Summed kW	(The above three lines - Gross Summed kWh/kW/Therm values - multiplied by the appropriate IR and RR - from the other row columns listed above - applied)
IR*RR Summed Therm	
Net Summed kWh	
Net Summed kW	(The above three lines - IR*RR Summed kWh/kW/Therm values - multiplied by the appropriate NTG values - from the other row columns listed above - applied)
Net Summed Therm	
2P Gross Summed kWh	
2P Gross Summed kW	
2P Gross Summed therm	
2P IR*RR Summed kWh	
2P IR*RR Summed kW	(2nd period savings values for those ER/RET measures that have a second period savings not just a single period or single life savings value)
2P IR*RR Summed Therm	
2P Net Summed kWh	
2P Net Summed kW	
2P Net Summed Therm	
Sum Life Gross kWh	
Sum Life Gross kW	(this include a rollup of both the RUL and RUL-to-EUL period savings for measures that have a 2nd period)
Sum Life Gross therm	
Sum Life Net kWh	
Sum Life Net kW	(this is the above three rows - Sum Life Gross kWh/kW/therm values - multiplied by the appropriate NTG value)
Sum Life Net therm	
Summed IncentiveToOthers	
Summed DirectInstallLab	
Summed DirectInstallMat	
Summed EndUserRebate	(these are not per unit but total including install count)
Summed Gross GrMeaCost	
Summed Net GrMeaCost	
Summed Gross MeaCost_ER	
Summed Net MeaCost_ER	(used for ER measures instead of above values, note that only unique RUL/EUL pairs are rolled up so this is the second period incremental cost rolled up for ER for those measures)



The individual 2015 claims records must be rolled up into summed records for unique combinations of values for the below listed fields.  
The rolled up 2015 claim records used to produce each row must have summed values for each of the fields listed below.

Utility	PA	ProgramID	ProgramName	MeasAppType	MeasureName	Sector	Bldg Type (see instructions)	Vintage (see instructions)	Climate Zone (see instructions)
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EUL	RUL	NTGRkWh	NTGRkW	TGRTherm	NTGRCost	IRkWh	IRkW	IRTherms	RRkWh	RRkW	RRTherms	Gross Summed kWh	Gross Summed kW	Gross Summed therm	IR*RR Summed kWh	IR*RR Summed kW	IR*RR Summed Therm	Net Summed kWh	Net Summed kW
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For ESPI payment purposes IOUs must ONLY report claims on funds spent in 2015 that are included in the 2015 authorized budget (and must exclude all funds reported as spent in previous years and all committed expenditures for activities in future years).  
 Expenditures that are reported this year as the basis for ESPI payments or limits/caps MUST NOT be included in previous or future year ESPI payment request filings.

Utility	PA	Program ID	Main Program Name / Sub-Program Name	Resource / Non-Resource	Total 2015 Compliance Budget	Total 2015 Expenditures				Administrative Cost	Marketing & Outreach	Total Direct Implementation		On Bill Financing	EM&V Costs	Program Type	Market Sector	Pilot Program	Program Status	Utility Grouping
						Paid in 2015 from Pre-2015 Budget (previously reported as spent)	Paid in 2015 from Pre-2015 Budget (Not previously reported as spent)	Paid in 2015 from 2015 Budget	Committed in 2015, from 2015 Budget, for Post-2015 activities/ Completions			Customer Services	Incentives & Rebates							

PGE  
 SCE  
 SDGE  
 SCG

PGE	Resource	Agricultural	Deemed Uncertain
SCE	Non-Resource	Commercial	Deemed Certain
SDGE		Cross Cutting	Custom
SCG		Industrial	
		Residential	

**ATTACHMENT C**

**Advice No. 5024**

**Table 1 – 2015 ESPI Ex Ante Savings**

**Table 2 – 2015 ESPI Expenditures**

**Table 3 – 2015 ESPI Components**







A dense grid of data spanning the entire page, likely representing a financial statement or a large dataset. The data is organized into rows and columns, with some larger cells and many smaller cells. The content is too small to read in detail but appears to be structured data.











Year	Q1	Q2	Q3	Q4	YTD	...
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Table 3: SoCalGas 2015 ESPI Components

	2015 Earnings				
		Non-Admin Expenditures	Earnings Rate		Total
Component 1	Non-Resource Program Management Fee	\$ 11,242,586	3%		\$ 337,278
Component 2	Codes & Standards Program Management Fee	\$ 491,746	12%		\$ 59,009
Component 3	Ex Ante Review Process Performance Award	\$ 47,745,073	3%	EAR Score 41.91%	\$ 600,299
Component 4	Energy Efficiency Resource Savings Performance Award	MMTh 129	Earnings Coefficient		\$ 3,054,682
	2015 Ex Ante Savings Performance Award	34	\$ 30,454		\$ 1,024,615
	2014 Ex Post Savings Performance Award	95	\$ 21,331		\$ 2,029,846
	Adjusted Ex Ante Review Earnings				\$ 221
	2014 UAFCB Audit True Up				\$ (2,572)
Total	Final PY 2014 & Initial PY 2015 ESPI Earnings				\$ 4,048,696

**ATTACHMENT D**

**Advice No. 5024**

**Natural Gas Transportation Rate Revenues**

**Advice No. 5024**  
**Natural Gas Transportation Rate Revenues**  
**Southern California Gas Company**  
**9/1/2016 Rates**

**PY 2014-2015 EE Incentive Award**

	Present Rates			Proposed Rates			Changes		
	Sep-1-16 Volumes Mth	Average Rate \$/therm	Sep-1-16 Revenues \$000's	Sep-1-16 Volumes Mth	Proposed Rate \$/therm	Sep-1-16 Revenues \$000's	Revenue Change \$000's	Rate Change \$/therm	% Rate change
	A	B	C	D	E	F	G	H	I
<b>CORE</b>									
Residential	2,337,534	\$0.82579	\$1,930,308	2,337,534	\$0.82716	\$1,933,524	\$3,217	\$0.00138	0.2%
Commercial & Industrial	984,102	\$0.43695	\$430,003	984,102	\$0.43758	\$430,627	\$624	\$0.00063	0.1%
NGV - Pre SempraWide	117,220	\$0.22350	\$26,199	117,220	\$0.22369	\$26,221	\$22	\$0.00019	0.1%
SempraWide Adjustment	117,220	\$0.00845	\$991	117,220	\$0.00844	\$989	(\$2)	(\$0.00002)	-0.2%
NGV - Post SempraWide	117,220	\$0.23196	\$27,190	117,220	\$0.23213	\$27,210	\$20	\$0.00017	0.1%
Gas A/C	825	\$0.23097	\$190	825	\$0.23118	\$191	\$0	\$0.00020	0.1%
Gas Engine	16,774	\$0.15232	\$2,555	16,774	\$0.15232	\$2,555	\$0	\$0.00000	0.0%
<b>Total Core</b>	<b>3,456,455</b>	<b>\$0.69153</b>	<b>\$2,390,246</b>	<b>3,456,455</b>	<b>\$0.69265</b>	<b>\$2,394,107</b>	<b>\$3,861</b>	<b>\$0.00112</b>	<b>0.2%</b>
<b>NONCORE COMMERCIAL &amp; INDUSTRIAL</b>									
Distribution Level Service	893,164	\$0.07253	\$64,777	893,164	\$0.07266	\$64,894	\$116	\$0.00013	0.2%
Transmission Level Service (2)	654,456	\$0.01835	\$12,012	654,456	\$0.01837	\$12,024	\$12	\$0.00002	0.1%
<b>Total Noncore C&amp;I</b>	<b>1,547,620</b>	<b>\$0.04962</b>	<b>\$76,789</b>	<b>1,547,620</b>	<b>\$0.04970</b>	<b>\$76,918</b>	<b>\$128</b>	<b>\$0.00008</b>	<b>0.2%</b>
<b>NONCORE ELECTRIC GENERATION</b>									
Distribution Level Service									
Pre Sempra Wide	333,969	\$0.06483	\$21,650	333,969	\$0.06495	\$21,690	\$40	\$0.00012	0.2%
Sempra Wide Adjustment	333,969	(\$0.00809)	(\$2,702)	333,969	(\$0.00812)	(\$2,710)	(\$9)	(\$0.00003)	0.3%
Distribution Level Post Sempra Wide	333,969	\$0.05674	\$18,948	333,969	\$0.05683	\$18,980	\$32	\$0.00009	0.2%
Transmission Level Service (2)	2,641,080	\$0.01506	\$39,771	2,641,080	\$0.01508	\$39,819	\$49	\$0.00002	0.1%
<b>Total Electric Generation</b>	<b>2,975,049</b>	<b>\$0.01974</b>	<b>\$58,719</b>	<b>2,975,049</b>	<b>\$0.01976</b>	<b>\$58,799</b>	<b>\$80</b>	<b>\$0.00003</b>	<b>0.1%</b>
<b>TOTAL RETAIL NONCORE</b>	<b>4,522,669</b>	<b>\$0.02996</b>	<b>\$135,508</b>	<b>4,522,669</b>	<b>\$0.03001</b>	<b>\$135,717</b>	<b>\$208</b>	<b>\$0.00005</b>	<b>0.2%</b>
<b>WHOLESALE &amp; INTERNATIONAL (excluding SDG&amp;E)</b>	<b>317,990</b>	<b>\$0.01486</b>	<b>\$4,724</b>	<b>317,990</b>	<b>\$0.01488</b>	<b>\$4,730</b>	<b>\$6</b>	<b>\$0.00002</b>	<b>0.1%</b>
<b>OTHER SERVICES (SDG&amp;E, UBS, &amp; BTS)</b>	<b>1,247,558</b>		<b>\$230,820</b>	<b>1,247,558</b>		<b>\$230,840</b>	<b>\$20</b>		
<b>SYSTEM TOTAL w/BTS</b>	<b>9,544,672</b>	<b>\$0.28930</b>	<b>\$2,761,300</b>	<b>9,544,672</b>	<b>\$0.28973</b>	<b>\$2,765,395</b>	<b>\$4,095</b>	<b>\$0.00043</b>	<b>0.1%</b>
EOR Revenues	203,920	\$0.03729	\$7,604	203,920	\$0.03735	\$7,616	\$12	\$0.00006	0.2%
Total Throughput w/EOR Mth/yr	9,748,592			9,748,592					

1) These rates are for Natural Gas Transportation Service from "Citygate to Meter". The BTS rate is for service from Receipt Point to Citygate.  
2) All rates include Franchise Fees & Uncollectible charges