

PUBLIC UTILITIES COMMISSION

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January 5, 2020

Ronald Van der Leeden
Director – Regulatory Affairs
Southern California Gas Company
555 West 5th Street – GT14D6
Los Angeles, CA 90013-1011

Mr. Van der Leeden,

Energy Division approves Southern California Gas's (SCG) Annual Budget Advice Letter 5684-A, pursuant to the Annual Budget Advice Letter (ABAL) review criteria laid out in Decision (D.) 18-05-041, which addressed the energy efficiency business plans. Specifically, SCG's ABAL meets cost-effectiveness, budget and savings forecast requirements. Energy Division approves SCG's spending budget request of \$106,195,000 for 2021 to administer energy efficiency programs, effective January 1, 2021.¹

Note, on September 30, 2020, the Governor signed AB 841, authorizing energy efficiency portfolio funding for the Schools Energy Efficiency Stimulus Program (SEESP) beginning in year 2021. Subsequently, on October 7, 2020, the California Public Utilities Commission (CPUC) issued a ruling in Rulemaking 13-11-005 seeking comments on the budget for the SEESP, indicating that the CPUC will decide through the formal proceeding AB 841 related budget issues. Given this, Energy Division will not delay authorization of the 2021 ABALs while the CPUC determines additional guidance on the SEESP budget pursuant to AB 841

SCG's supplemental filing received on November 24, 2020 reflects it is reserving the unspent and uncommitted budget from PY2020 for the SEESP program until the CPUC provides additional guidance pursuant to the October 7, 2020 ruling.

1. Background

On September 1, 2020, SCG filed its Annual Budget Advice Letter (ABAL) 5684. On October 1, 2020, the Public Advocates Office at the California Public Utilities Commission (Cal Advocates) and the Small Business Utility Advocates (SBUA) each filed their respective protests of SCG's ABAL 5684, while the California Efficiency and Demand Management Council (Council) filed its response. On October 8, 2020, SCG filed its response to the Council's response to, and Cal

¹ SCG's total proposed spending budget for 2021 is \$106,195,000. The authorized total program administrator budget recovery request [SCG + Regional Energy Network (RENs)] is \$104,432,000. Additionally, SCG's supplemental Advice Letter 5684-A reflects SCG's decision to reserve PY2020 unspent uncommitted funds for AB841 programmatic activity. Consequently, SCG's budget recovery request is not reduced by the carryover of those funds, as was done in prior program years via the ABAL process.

Advocates, and SBUA protests of, ABAL 5684. On November 24, 2020, SCG filed its supplemental, 5684-A, replacing 5684 in its entirety.²

2. Cal Advocates Protest and SCG Reply Comments

Cal Advocates' protest included three items directed at SCG's 2021 ABAL that ask the CPUC to:³

- Require SCG to file a supplemental ABAL substantiating their cost-effectiveness forecasts in light of persistent underperformance, to ensure the portfolio will be cost-effective on an evaluated basis, pursuant to D.18-05-041.
- Mandate that all program administrators (PAs) improve cost-effectiveness and reduce risk in their portfolios to respond to COVID-19-related uncertainties, including:
 - Requiring PAs to reduce spending on sectors with low cost-effectiveness; and
 - Requiring PAs to reallocate this spending to the residential sector.
- Require PAs to standardize their accounting and reporting practices for unspent, uncommitted funds.

2.1. Substantiate Forecast due to Persistent Underperformance

In its protest filed October 1, 2020, Cal Advocates argued that SDG&E, SCG, and MCE have persistently underperformed relative to their forecasts and the likelihood of SDG&E's, SCG's and MCE's 2021 portfolios performing cost-effectively is undermined by the overly optimistic picture presented in their forecasts. According to Cal Advocates, PA forecasts and reported cost-effectiveness results are usually higher than the evaluated/claimed results, as shown in Table 1 of their protest below.

² SCG filed supplemental ABAL 5684-A on November 24, 2020, in which it updated Statewide (SW) forecasts for certain programs based on lead IOUs' supplemental 2021 ABAL; updated local program forecasts based on SW adjustments; updated savings for water heater measures based on DEER updates; revised 2021 ESPI award to "0" in accordance with D.20-11-013, and made minor budget adjustments based on SW program changes; SCG is still forecasting a portfolio TRC of 1.09 despite these changes. The supplemental advice letter was filed without a protest period, per Energy Division guidance.

³ See *The Public Advocates Office's Protest of Energy Efficiency Annual Budget Advice Letters for Program Year 2021* (Cal Advocates Protest), September 1, 2020, p. 2.

Table 1 Comparison of Reported and Evaluated TRC Ratios of Energy Efficiency Portfolios						
Change in Portfolio TRC Ratios (excluding Codes & Standards)						
PA	2013-2015	2017	2017	2018	2019	2020 (H1)
	Claimed to Evaluated	Forecast to Claimed	Claimed to Evaluated	Forecast to Claimed	Forecast to Claimed	Forecast to Claimed
SDG&E	-0.16	+ 0.30	-0.48	+ 0.31	-0.31	-1.07
SoCalGas	-0.17	-0.40	-0.14	-0.31	-0.49	-0.55
MCE	+ 0.01	-0.27	NA	-0.28	-0.77	-0.89

In its reply, SCG stated that its ABAL contains the necessary and required information to justify its forecasted TRC. SCG believes the TRC values and savings projections presented in their filing are achievable and based on realistic assumptions.

To the point about historical underperformance, SCG stated that legacy statistics, and data points matter less when considering that SCG is shifting to a portfolio of new third-party programs. SCG further stated that its submittal is based on the best available information at the time it was submitted and the forecasting certainty that Cal Advocates seeks is just not feasible. Furthermore, SCG claimed that it has consistently been able to serve its customers' needs; when looking at the forecasts and actuals through a customer reach and terms saved lens, SCG claimed that it consistently outperforms.

Discussion

The ABAL review criteria laid out in D. 18-05-041 requires a PA ABAL to meet energy savings goals, be cost-effective and propose a budget that is at or under the authorized budget cap for the program year. SCG's 2021 ABAL, as filed, is cost-effective on a benefit/cost ratio as measured by the TRC. Specifically, SCG's 2021 ABAL has a TRC of 1.09 (excluding savings from Codes and Standards programs)⁴ which is above the 1.0 TRC threshold set by D. 18-05-041.

Staff finds SCG's TRC estimate to be questionable based on its historical confirmed TRC results as noted in CEDARs (see Table A below); While the confirmed TRC results, including codes and standards (C&S), over the last three years are in line with what SCG forecasts for 2021, staff notes that SCG's confirmed TRC rates for 2019 without C&S falls significantly below the required 1.00 threshold. Additionally, SCG's TRC ratio of .70 for the first half of 2020 leads to questions about whether SCG will be able to meet its TRC goal for 2020 as well. While it is possible for SCG to

⁴ CPUC policy requires portfolio cost-effectiveness to be measured in the absence of savings from Codes and Standards programs, regardless of their magnitude as a percentage of total portfolio savings.

improve its TRC score by .30 for the remainder of the year, we note that uncertainties related to COVID-19 adds a significant degree of uncertainty.

Table A

SCG - TRC	2018*	2019*	2020**	2021***	2021****
TRC w/ C&S	1.78	1.62	1.61	1.60	1.60
TRC w/o C&S	1.07	0.69	0.70	1.13	1.09

*From CEDARs Quarterly Filings - Confirmed Claim Summary

**Represents the first 6 months of 2020

***SCG 2021 Forecast - AL 5684

****SCG 2021 Forecast - AL 5684-A

In light of the uncertainty described above, we draw from the CPUC’s July Ruling which provided guidance for CPUC staff review of PAs’ 2021 ABALs. The guidance allows budget recovery requests to be approved “whether or not they meet all of the criteria originally laid out in D. 18-05-041.”⁵ The CPUC also recognized the challenges that affect and diminish portfolio cost-effectiveness, which were initially acknowledged in D. 18-05-041, as well as the uncertainty attendant to the third-party transition process, all of which are affected by the economic challenges caused by the COVID-19 pandemic. Consequently, in the interest of sustaining energy efficiency program funding and continue program operations through 2022, as noted in the July Ruling, SCG’s spending budget request for program year 2021 is approved.

2.2. COVID-19 Impacts

In its protest, Cal Advocates argued that the COVID-19 pandemic requires:

- robust portfolios with minimal risks, and
- the CPUC to have all PAs modify their respective portfolios to improve cost-effectiveness by reducing spending on sectors with low cost-effectiveness and allocating more resources to the residential sector.⁶

Cal Advocates’ protest argued that the economic hardship created by COVID-19 for California ratepayers has led to a significant increase in residential energy consumption and that the PAs and CPUC should ensure portfolio cost-effectiveness and maximize benefits for every dollar spent to ensure more customers realize energy savings and lower bills. Cal Advocates’ protest also stated that the July Ruling “should not be interpreted as an invitation for leniency in meeting cost-effectiveness requirements.”⁷ Lastly, the protest stated that the CPUC should protect ratepayers by requiring modifications to create more robust energy efficiency portfolios and minimize the risk of underperformance during uncertain times and ratepayer funds being wasted on programs that

⁵ See Ruling, p. 9.

⁶ See Cal Advocates Protest, pp. 6-7.

⁷ Ibid.

deliver few benefits⁸. The table below, from Cal Advocates protest shows \$48.3 million dollars SCG allocated to programs that are not cost-effective, representing 46% of SCG overall portfolio budget.

Table 4			
SoCalGas			
2021 EE Portfolio Budget by Sector			
Sector	Total Budget (\$mm)	Budget for Programs with TRC less than 1.0	
		\$mm	%
Agricultural	\$5.1	\$0.06	1%
Commercial	\$25.1	\$4.1	16%
Cross-Cutting	\$0.0	\$0.0	N/A
Industrial	\$12.5	\$0.3	2%
Public	\$9.2	\$4.4	48%
Residential	\$40.5	\$27.7	68%
Portfolio Total	\$104.0	\$48.3	46%

Cal Advocates also emphasized the need to reduce the substantial risk of portfolio underperformance and protect ratepayer funds and asked the CPUC to require SCG (and all PAs) to reduce spending on non-cost-effective sectors and programs.⁹ In order to achieve those ends, Cal Advocates recommended that SCG reduce its Commercial sector budgets by 13 percent and reallocate those funds (approximately \$3.3 million) to the Residential sector.¹⁰

In its reply, SCG stated that, while it recognizes the impact that COVID-19 has had on its customers, SCG is doing all it can to help ensure its customers are not left in the cold because of the pandemic. SCG noted its customers are not just in the Residential sector and it has an obligation to serve all its customers that pay into the Public Purpose Program Surcharge; SCG claimed its portfolio is not merely for residential service and equal access to energy efficiency is important. SCG also stated it is not appropriate to shift money from one set of SCG’s customers to another on the theory that the pandemic has disproportionately impacted one sector more than others. According to SCG, there are many opportunities in the non-residential sectors that exist because of unparalleled access during the change in building occupancies.

Discussion

In its July Ruling, the CPUC acknowledged that PAs face a significantly changed landscape due to COVID-19 and asked them to include “accurate and good faith estimates of energy efficiency costs and benefits, as well as budgets, that are necessary to address the current goals and strategies” in their respective program year 2021 ABALs. The CPUC also recognized the challenges that affect

⁸ Ibid.

⁹ See Cal Advocates Protest, p. 9.

¹⁰ See Table 8, Cal Advocates Protest, p. 10.

and diminish portfolio cost-effectiveness including “how to define cost-effectiveness requirements, and how they should be applied in the setting of potential and goals and budget approval,” as well as the uncertainty related to the third-party transition process, all of which are affected by the economic challenges caused by the COVID-19 pandemic. Furthermore, the Energy Division recognizes that, in its role as a PA and manager of its respective portfolio, SCG’s 2021 Residential sector budget of approximately \$40.9 million is suitable and designed to address the needs of customers at this time. SCG’s 2021 Residential sector budget is 41 percent of SCG’s total 2021 portfolio budget (excluding Codes and Standards). In looking at historical budgets and expenditures, staff notes that SCG already allocates the largest percentage of its budget to its residential sector.

SCG Historical Budget Allocations by Sector								
Market Sector	2018		2019		2020***		2021	
	Revised Operating Budget*	% of Total Budget	Revised Operating Budget*	% of Total Budget	Revised Operating Budget*	% of Total Budget	Proposed Budget**	% of Total Budget
Agriculture	\$ 2,163,506.00	2%	\$ 1,547,054.00	2%	\$ 2,474,945.00	2%	\$ 5,180,000.00	5%
Commercial	\$ 18,367,875.00	19%	\$ 25,811,456.00	25%	\$ 24,290,969.00	23%	\$ 25,399,000.00	25%
Cross-Cutting	\$ 12,926,915.00	13%	\$ 11,666,618.00	11%	\$ 13,202,052.00	13%	\$ 6,187,000.00	6%
Industrial	\$ 7,754,344.00	8%	\$ 4,405,840.00	4%	\$ 14,764,428.00	14%	\$ 12,609,000.00	13%
Public	\$ 4,745,026.00	5%	\$ 6,668,391.00	7%	\$ 9,806,329.00	9%	\$ 9,269,000.00	9%
Residential	\$ 52,818,905.00	53%	\$ 51,861,642.00	51%	\$ 39,525,278.00	38%	\$ 40,990,000.00	41%
	\$ 98,776,571.00	100%	\$ 101,961,001.00	100%	\$ 104,064,001.00	100%	\$ 99,634,000.00	100%
*Data obtained from SCG Monthly Report Summaries on CEDARs for each sector and year								
**SCG Draft ABAL Submitted to CAEEC								
***Based on first 6 months of CEDARs reporting for 2020								

Additionally, in response to Cal Advocates claim that SCG should file a supplemental advice letter to further substantiate its forecasted TRC, as shown in Attachment E of SCG’s filing, of the seventeen programs SCG has identified to close in December of 2020, thirteen had a claimed TRC of less than .50 in Q1 of 2020. This demonstrates that SCG is adjusting its portfolio accordingly to maintain an appropriate TRC based on the currently available data. As such, SCG is not required to file another supplemental advice letter for this purpose.

Consequently, SCG is not required to file a supplemental ABAL that reallocates budgets from non-residential sectors to the residential sector and SCG’s 2021 ABAL 5684-A as filed and supplemented on November 24th is approved.

2.3. Standardized Accounting for Unspent and Uncommitted Funds

In its protest, Cal Advocates argued that the CPUC should require SCG to file a supplemental ABAL to standardize accounting and reporting of unspent and uncommitted funds and use of ABAL templates. Specifically, Cal Advocates pointed to SCG’s inclusion of \$5,000 of carryover funds from 2020 in Table 7 of its filing that failed to indicate that this figure is represented in the thousands.

In its reply, SCG stated Cal Advocates was incorrect in its read of the table and the PAs should not be punished for it. Per SCG AL 5684, Table 1 on page 3 of its filing clearly states that numbers are provided in thousands. SCG acknowledged that Table 3a in Attachment A of AL 5684 should have

noted the numbers were presented in thousands. SCG also stated in its reply that it does not believe any change is necessary to correct Cal Advocates' misinterpretation of Table 3a but that it was amenable to submitting a substitute sheet for this appendix in Attachment A of its AL making this clarification. This substitution sheet was filed on October 15, 2020.

Discussion

In a review by CPUC staff, the substitution filing by SCG as noted above, and later supplemental advice letter 5684-A filed on November 24th, SCG does provide clarification that the \$5,000 figure noted in Table 7 of its filing is in the thousands. Consequently, SCG adhered to current accounting and reporting requirements related to unspent and uncommitted fund and is not required to file an additional supplemental ABAL.

3. The Council's Response and SCG Reply Comments

The Council filed its response to the PA advice letters, including SCG's ABAL 5684 on October 1, 2020. In its response, the Council highlighted its concerns regarding decreased energy efficiency portfolio budgets since 2017 noting a general 36 percent decline from 2017 to 2021 forecasts which it finds troublesome in light of the COVID-19 impacts on California ratepayers. The Council's overarching comments recommend that the CPUC adhere to its interpretation of the July Ruling¹¹ to enable the "broadest possible deployment of EE during this incredibly difficult time" and reform cost-effectiveness, in part, in order to do so.¹²

Additionally, the Council expressed concerns about the unclear nature of the IOU process for determining the forecasted cost-effectiveness (TRC) of third-party programs claiming that it understands "that certain implementers have submitted forecasted project and measure mixes for their programs with program level TRCs above 1.0 but for which the IOUs are forecasting TRCs below 1.0." The Council also claimed that "the IOUs are not even providing the TRC forecast for programs they are terminating or making changes to," though this is a specific reference to Southern California Edison (SCE). The Council asserted that if an implementer forecast is cost-effective, project applications should be allowed to continue, arguing that the process is not transparent and prevents an accurate cost-effectiveness evaluation of current programs and the rationale behind proposed program closures.¹³

The Council's response also cited its concerns regarding proposed program closures that are based on prior program performance, highlighting policy and process changes that affect project-level cost-effectiveness including reduced Effective Useful Life (EUL) parameters. The Council argued that while, in certain instances, these changes can be overcome, they often occur in the middle of an existing contract and reduce the cost-effectiveness of projects that have already incurred significant investments on the part of implementers and/or customers.

Lastly, the Council expressed its concerns over what it perceives as program gaps as the IOUs ramp down existing programs to make room for new programs developed via the ongoing third-party

¹¹ R.13-11-005, "Assigned Commissioner and Administrative Law Judges' Amended Scoping Ruling Addressing Impacts of COVID-19", p. 10.

¹² See Response of California Efficiency + Demand Management Council (Council Response), October 1, 2020, p. 2.

¹³ See Council Response, p. 3.

solicitation process. The Council believes this issue is compounded by COVID-19's effects on the portfolio at large and asks the CPUC to:

- immediately allow existing programs to submit new cost-effective project applications, and
- allow all projects with forecasted PACs above 1.0 to be submitted by 3rd party implementers of any program set to shut down or ramp down since 2018.

The Council recommended that the IOU 2021 ABALs be “modified” to incorporate the Council’s proposed changes.

SCG’s reply to The Council’s comments indicated that it agrees with The Council and has requested the maximum budget in its Annual Budget Advice Letter (ABAL), so its budget is not in decline. Regardless, SCG agreed and supports the idea that more funding should be allocated to EE. Additionally, SCG believes more EE penetration into the market is a key component of California’s climate change mitigation and energy usage reduction strategies and making more EE available now to customers would provide an immediate benefit to those hit hardest by the global COVID-19 crisis.

Discussion

The Council’s protests are similar to concerns they expressed to the CPUC in a letter dated December 30, 2019. Specifically, that letter described the Council’s concerns regarding program closures, the larger third-party solicitation process, and decreased portfolio budgets as reflected in the IOUs 2020 ABALs. On February 4, 2020, Commissioner Lianne Randolph responded to the Council’s letter noting that declining budgets do not indicate less ongoing investments in energy efficiency but, rather, “signal the success of prior energy efficiency investments that have led to increasing amounts of energy efficiency that will be achieved through the Codes and Standards established by the California Energy Commission.”¹³

Commissioner Randolph reminded the Council that the most recent Potential and Goals Study, published in August 2019, reflected a one-third decrease in energy efficiency potential as compared to the 2017 study and that, although goals are lower, IOU program savings in combination with Codes and Standards savings are still supportive of the state energy and climate goals.

Further, the Commissioner’s letter also highlighted the IOUs responsibility to consider portfolio design trade-offs in order to meet cost-effectiveness requirements, including the ability to close certain programs as warranted, and described CPUC-IOU-stakeholder interactions to occur in 2020 regarding the ongoing third-party solicitation process, including actions specific to SCE and PG&E portfolio management, as well as custom projects review.

Lastly, all CPUC efficiency savings parameter updates go through the Database for Energy Efficient Resources (DEER) update process, in which stakeholders have the opportunity to review and comment on the proposed parameters updates, and the final updates are adopted via CPUC resolution. The DEER parameters updates do not go into effect immediately but are instead applied to programmatic activity two years after they are approved by the CPUC. For example, the parameter updates approved by the CPUC in the August 2020 DEER resolution do not go into effect until program year 2022.

Additionally, SCG's proposed program closures for 2021 appear to be reasonable. In a spreadsheet submitted as Attachment E to SCG's 2021 ABAL, SCG lists seventeen programs to be closed as of December 31, 2020. In place of these seventeen programs will be 20 new third party or statewide programs. These closed programs have a combined 2020 budget of approximately \$15.4 million. Thirteen of the seventeen programs to close have claimed TRC values of less than .50 as of Q1 in 2020. The three programs that have greater than a 1.0 TRC will continue in 2021 as a new Statewide or Local 3P program.

Consequently, SCG is not required to modify its 2021 ABAL to reflect changes requested by the Council.

4. SBUA Protest and SCG Reply Comments

SBUA's protest raised two issues that are related to SCG's 2021 ABAL:

- Investor-owned utilities must collaborate with RENs to ensure the needs of small business customers are being met, and
- PAs should breakdown data by customer subclasses

4.1. IOU/REN Collaboration to Meet the Needs of Small-Business Customers

In its protest, SBUA argued that meeting the needs of Hard-to-Reach (HTR) customers is not the sole responsibility of the Regional Energy Networks (REN). SBUA highlights D. 18-05-041 to support its assertion that the IOUs and RENs may "propose programs to serve HTR customers even if these programs overlap."¹⁴ SBUA stated that commercial HTR customers have historically low program participation rates and, as a critical customer class, should be targeted like residential customers. In order to achieve these ends, SBUA asked that Energy Division to require the IOUs and RENs to comply with D. 18-05-041 and refile their respective ABAL "with an analysis and plans that demonstrate coordination and effective plans to serve commercial HTR customers"¹⁵

In its reply to SBUA's comments SCG stated that the ABAL is not the appropriate document to discuss REN collaboration; the purpose of the ABAL is to seek approval of a budget. Cooperation between IOUs and RENs is documented by way of the joint cooperation memos (JCMs) that are submitted as advice letters to the CPUC each year as required by D.18-05-041.

Discussion

SCG is correct when it describes the annual JCM as the primary source for information that SBUA asks for in its protest. These memos are filed annually by each PA that has RENs and/or CCAs in its territories and describes how each entity will cooperate and coordinate in the coming year to ensure that ratepayer funds are providing the best service possible to the ratepayers in their respective overlapping territories. Consequently, SCG is not required to file a supplemental ABAL

¹⁴ See "Protest of Small Business Utility Advocates to the Energy Efficiency Annual Budget Advice Letters for Program Year 2021", October 1, 2020, p. 3.

¹⁵ Ibid

that describes cooperation between it and the appropriate RENs, as this would be duplicative of the JCM process.

4.2. Customer Sub-class Data

PAs currently report on funding requests, savings, etc., by general customer class (residential, commercial, industrial, and agricultural). In its protest, SBUA requested that PAs be required to break out data for residential and commercial customers into subgroups:

- res-single-family
- res-multi-family
- small commercial
- medium, and
- large commercial.

In addition, SBUA recommended that PAs be required to adopt SDG&E's approach of presenting information on rate impacts for each customer sub-class, which SBUA argued would improve stakeholder and CPUC staff understanding of whether and how PA program activities are targeting customer classes that face significant participation barriers.¹⁶

In its reply, SCG stated that the ABAL is not the appropriate venue to raise policy issues and Energy Division should not give any weight to SBUA's comments which attempt to raise policy issues through the ABAL process. Requiring new showings is a policy issue that should be addressed in the proceeding itself. Furthermore, SCG already provided a breakdown of bill payer impacts by subclass. This information is included in Table 2b of Attachment A in AL 5684-A.

Discussion

Energy Division agrees with SCG that the ABAL process, which is explicitly envisioned as a "ministerial"¹⁷ sector-level budget recovery request exercise tied to review criteria laid out in D. 18-05-041 is not the proper forum for issues better suited to PA data collection and reporting. Consequently, Energy Division did not ask SCG to break down customer data by sub-class as part of the ABAL review. Instead, Energy Division will work with the IOU PAs to determine the most feasible manner for which this revised data reporting provision may be achieved.

Please direct any questions regarding Energy Division's findings in this non-standard disposition to Lisa Paulo (lisa.paulo@cpuc.ca.gov).

¹⁶ See SBUA Protest, pp. 7-8.

¹⁷ See D. 15-10-028, p. 60

Sincerely,

Handwritten signature of Edward Randolph in cursive, with "(foi)" written in parentheses to the right.

Edward Randolph
Deputy Executive Director for Energy and Climate Policy/
Director, Energy Division

Cc: Service Lists R. 13-11-005 and A.17-01-013
Pete Skala, Energy Division
Jennifer Kalafut, Energy Division
Alison LaBonte, Energy Division
Lisa Paulo, Energy Division
Michael Campbell, The Public Advocates Office
Shelly Lyser, The Public Advocates Office
Ivan Jimenez, Small Business Utility Advocates
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November 24, 2020

Advice No. 5684-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 2021

Southern California Gas Company (SoCalGas) hereby submits for approval by the California Public Utilities Commission (Commission or CPUC) its 2021 Energy Efficiency (EE) Program Portfolio budget. The EE Program Portfolio, along with supporting documentation, is incorporated as Attachment A, which have been uploaded to the California Energy Data and Reporting System (CEDARS) website.¹

Purpose

This supplemental Advice Letter replaces Advice No. 5684 in its entirety to account for updates to the Commission's water heater calculator version 4.2, legislative requirements from Assembly Bill 841, updates to funds collected for Regional Energy Networks (RENs), and changes to the statewide program budgets in Attachment C resulting from recently executed contracts for statewide programs being administered by SoCalGas and Southern California Edison Company (SCE). Additionally, this supplemental includes Attachment E cataloguing program changes. This Advice Letter is submitted in compliance with Ordering Paragraph (OP) 4 of Decision (D.) 15-10-028,² which directs Program Administrators (PAs) to submit a Tier 2 Advice Letter containing the budget for the next calendar year's EE portfolio by the first business day in September; and with OPs 41 and 43 of D.18-05-041, which directs PAs to include information identified in D.18-05-041.

¹ <https://cedars.sound-data.com>.

² D.15-10-028, at pp. 123-124.

Background

On October 24, 2014, the Commission issued D.14-10-046, which authorizes funding for EE programs until 2025.³ On October 28, 2015, the Commission issued D.15-10-028, which approved the EE rolling portfolio mechanics for 2016 and beyond and explains that Annual Budget Advice Letter (ABAL) submittals will propose detailed budgets for cost recovery, transfer, and contracting purposes.⁴

On June 5, 2018, the Commission issued D.18-05-041, which approved the PAs EE business plans. D.18-05-041 directed the PAs to, beginning with the ABALs due on September 4, 2018, provide the following information in the ABAL submittals:⁵

- Forecasted Total Resource Cost (TRC) must meet or exceed 1.25, except during program years 2019-2022, when the forecasted TRC must meet or exceed 1.0;
- Forecasted energy savings goals must meet or exceed Commission established savings goals for each investor-owned utility (IOU);
- Forecasted budget must not exceed the PA's annual budget in the approved business plans, or (if applicable) the revised annual budget in this ABAL;
- Sector-level Metrics;
- A description of program and portfolio changes; and
- Supplemental budget information in the format of the June 12, 2017 supplemental budget submittals.

On May 21, 2019, the Commission issued D.19-05-019 adopting three new cost-effectiveness analysis framework policies for distributed energy resources. OP 2 of D.19-05-019 directed all Commission filings and submissions requiring cost-effectiveness analysis of distributed energy resources, to review and consider the results of the Program Administrator Cost (PAC) Test and the Ratepayer Impact Measure (RIM) Test.

On August 23, 2019, the Commission issued D.19-08-034 which established EE savings goals for 2020-2030.

At the direction of the Energy Division, SoCalGas includes Attachment A as part of the ABAL submittal. Attachment A has been uploaded to the CEDARS website and will be made available on <http://www.socalgas.com/regulatory/R13-11-005.shtml>. Attachment B of this Advice Letter provides the CEDARS Filing Confirmation which was printed from the confirmation dashboard upon confirmed completion of the filing through CEDARS.

³ D.14-10-046, OP 21, at p. 167.

⁴ D.15-10-028, at p. 56.

⁵ D.18-05-041, at pp. 124-129 and OP 44.

SoCalGas' 2021 Budget and Savings

SoCalGas' 2021 program year (PY) budget is \$106,195,000, consistent with D.18-05-041. The 2021 funding request does not include the program budget for the SoCalGas Statewide Marketing, Education & Outreach (ME&O) program, nor the 2021 program budget for the Statewide Financing Pilots.⁶ The Southern California Regional Energy Network (SoCalREN) and Tri-County Regional Energy Network (3C-REN) are submitting their own Advice Letters to implement programs and associated budgets for PY 2021. Table 1 lists SoCalGas' 2021 budget and the forecasted energy savings, by sector.

Table 1: SoCalGas 2021 Budget and Savings

Sector	Program Year (2021) Budget (\$000's)	SCG PY2021 FORECAST ENERGY SAVINGS (Net)		
		forecast kWh	forecast kW	forecast therms (MMth)
Residential	\$40,990	5,820,511	533	15.00
Commercial	\$25,399	1,488,401	646	3.39
Industrial	\$12,609	-	-	4.46
Agriculture	\$5,180	71,564	-	1.11
Emerging Tech	\$1,528	-	-	-
Public	\$9,269	2,921	1	1.51
WE&T	\$4,009	-	-	-
Finance	\$650	-	-	-
OBFL Loan Pool	\$0	-	-	-
IOU Subtotal (does not include ESA savings)	\$99,634	7,383,396	1,181	25.47
	CPUC Savings Goal (w/o C&S)	-	-	14.00
	Forecast savings as % of CPUC Savings Goal (w/o C&S)			182%
Codes and Standards	\$2,140	-	-	21.12
IOU EM&V	\$4,421			
IOU PY Spending Budget Request¹	\$106,195			
(LESS) IOU Uncommitted and Unspent Carryover Balance²	\$0			
IOU PY Budget Recovery Request³	\$106,195			
IOU Authorized PY Budget Cap (D.18-05-041)	\$106,195			
SoCalREN PY Budget Recovery Request (excl. CCA Uncommitted/Unspent Carryover)⁴	-\$2,586			
3C-REN PY Budget Recovery Request (excl. REN Uncommitted/Unspent Carryover)⁴	\$823			
Total PA (IOU+CCAs+RENS) PY Recovery Budget⁵	\$104,432			
IOU Forecast PY TRC (No Codes & Standards)	1.09			
IOU Forecast PY PAC (No Codes & Standards)	1.43			
For reference only				
SoCalREN EM&V PY Budget	\$43			
3C-REN EM&V PY Budget	\$19			
EM&V PY PA Budget Total	\$4,359			

¹This is amount by which Statewide 40% requirement will be measured, and what the IOU intends to spend in the PY, including carryovers.

²The balance of unspent uncommitted must reflect the total unspent uncommitted starting Jan 1 2020 through Dec 31 of current year (PY-1). Because each ABAL is filed in Q3, this unspent uncommitted amount will be an estimate for the year in which the ABAL is filed. SoCalGas's \$5,000,000 in unspent/uncommitted for program year will not be amortized for 2021 and is not included in this total due to funding of Assembly Bill 841 for 2021 School Energy Efficiency Stimulus Program.

³The amount of funds to be collected (budget recovery) for the Program Year - Line 19 less line 20

⁴Add a separate row for each REN or CCA

⁵Line 25 is a mix of budget spending and budget recovery for all PAs in the IOU service area

⁶ Budgets for these programs were approved in D.19-01-005 and Resolution E-5072, respectively.

SoCalGas' allocation of the evaluation, measurement & verification (EM&V) budget is in conformance with the direction provided in D.16-08-019,⁷ which maintains EM&V budget levels at 4% of the portfolio budget and funding split accessible to Energy Division and PAs of 72.5% / 27.5%, respectively.

SoCalGas Portfolio Cost-Effectiveness

SoCalGas is proposing a portfolio cost-effectiveness based upon approved energy savings and cost-effectiveness inputs to its program and measure mixes, as shown in Table 2 below. The portfolio cost-effectiveness may change as the Commission releases measure dispositions and other key inputs which could reduce or improve portfolio savings and cost-effectiveness. SoCalGas will continue to evaluate its portfolio as cost-effectiveness inputs change.

Table 2: 2021 EE Portfolio Cost-Effectiveness

	Cost-Effectiveness		
	TRC	PAC	RIM
Without Codes & Standards	1.09	1.43	1.43
With Codes & Standards	1.60	3.49	3.49

The SoCalGas TRC and PAC cost-effectiveness results reflect the inclusion of the following inputs:

- Uses the updated avoided cost values for 2021 in the Cost-Effectiveness Tool (CET), version ACC_2020_v1a, adopted in Resolution E-5077.
- Excludes the 5% market effects adjustment from PA forecasts, as required in D.19-08-034.⁸
- Uses approved workpaper values based on the August 20, 2020 guidance provided by Energy Division and incorporates revised workpaper savings values based on revisions to the water heater calculator (v4.2).
- General Rate Case (GRC) loaders associated with the EE program labor, as directed by D.12-11-015, OP 39.
- A projected shareholder incentive amount associated with the approved portfolio budget and projected therm savings activity. This assumption conforms to the methodology adopted in the Efficiency Savings and Performance Incentive (ESPI) Mechanism in D.13-09-023.

⁷ D.16-08-019, at pp. 79-81.

⁸ D.19-08-034, at p. 27.

D.18-05-041 requires claimed and evaluated TRC and PAC of each program and of each sector for the two most recent years for which data is available.⁹ Claimed TRC and PAC for 2018 and 2019 are available on CEDARS. D.18-05-041 also requires a showing of forecasted, claimed and evaluated TRC and PAC at the portfolio level going back to the beginning of the Rolling Portfolio (2016).¹⁰ SoCalGas provides this information in Table 3 below.

Table 3: Forecasted, Claimed, and Evaluated TRC and PAC

SoCalGas Energy Efficiency Portfolio (without C&S)						
Program Year	Portfolio-level Cost-Effectiveness¹					
	Forecast TRC ^{2,3}	Reported TRC	Evaluated TRC ⁴	Forecast PAC ^{2,3}	Reported PAC	Evaluated PAC ⁴
2016	-	0.74	Not Available	-	1.07	Not Available
2017	1.22	0.81	0.67	1.58	1.12	0.87
2018	1.38	1.07	Not Available	1.77	1.25	Not Available
2019	1.19	0.69	Not Available	1.41	0.85	Not Available
2020	1.25	-	N/A	1.53	-	N/A

¹ Forecasted and Reported in CEDARS; TRC values exclude costs from SoCalREN, and includes non-resource program costs and forecasted/approved ESPI payments (as applicable). Starting with PY 2020, forecasted TRC/PAC values exclude market spillover effects.

² Forecasted PAC and TRC values include General Rate Case (GRC) loaders associated with the EE program labor as directed by D.12-11-015, OP 39.

³ Adopted budget for 2016 was approved via D.14-10-046; no budget compliance filing was completed for 2016.

⁴ 2017 evaluated cost-effectiveness results obtained from the current Budget Filing Detail Report available in CEDARS.

SoCalGas Energy Efficiency Portfolio (with C&S)						
Program Year	Portfolio-level Cost-Effectiveness⁵					
	Forecast TRC ^{6,7}	Reported TRC	Evaluated TRC ⁸	Forecast PAC ^{6,7}	Reported PAC	Evaluated PAC ⁸
2016	-	1.49	Not Available	-	3.72	Not Available
2017	1.50	1.74	1.71	3.45	5.42	5.18
2018	1.88	1.78	Not Available	4.70	5.00	Not Available
2019	1.64	1.62	Not Available	4.16	4.03	Not Available
2020	1.59	-	N/A	3.16	-	N/A

⁵ Forecasted and Reported in CEDARS; TRC values exclude costs from SoCalREN, and includes non-resource program costs and forecasted/approved ESPI payments (as applicable). Starting with PY 2020, forecasted TRC/PAC values exclude market spillover effects.

⁶ Forecasted PAC and TRC values include General Rate Case (GRC) loaders associated with the EE program labor as directed by D.12-11-015, OP 39.

⁷ Adopted budget for 2016 was approved via D.14-10-046; no budget compliance filing was completed for 2016.

⁸ 2017 evaluated cost-effectiveness results obtained from the current Budget Filing Detail Report available in CEDARS.

In PY 2021, SoCalGas will continue its work towards achieving a cost-effective EE portfolio that meets the objectives of D.18-05-041. As part of PY 2020, SoCalGas adopted significant programmatic changes (i.e., more than 40% change in funding) approved through the 2020 ABAL (Advice No. 5510) to better align program offerings, meet expected energy savings, and target a forecasted 1.25 TRC in future years.

SoCalGas' strategies for 2021 will continue to focus on cost-effectiveness to both exceed an evaluated 1.00 TRC and forecasted 1.25 TRC through the ramp years. A listing of these strategies is provided below:

⁹ D.18-05-041, at p. 124.

¹⁰ D.18-05-041, at p. 125.

- Increasing the comprehensiveness of current programs offerings and/or delivery to minimize lost energy efficiency opportunities and reduced program cost.
- Continuing the expansion of program partnerships with municipal electric utilities, water agencies, and air quality districts to drive down administrative costs, and develop more holistic program offerings that provide added benefits to customers and increase cost-effectiveness.
- Continuing with Local Government Partnerships (LGPs), while consolidating some LGPs into existing Regional Partnerships with a focus on increasing cost effectiveness of partnerships, while better serving all segments of Public Sector customers within those Regional Partnerships.
- Eliminating or scaling of non-cost-effective programs and approaches based on program level metrics and key performance indicators.
- Continuous improvement of internal processes and program delivery strategies.
- Adding new measures and technologies as they become available.
- Leveraging expanded financing offerings to drive the conversion of EE project opportunities.

Further, focus on cost-effectiveness within SoCalGas' portfolio will be placed on the third-party solicitation process whereby SoCalGas plans to refresh market segment approaches with new cost-effective contracts.

SoCalGas PY 2021 Portfolio and Program Changes

As prescribed by the Energy Division, Attachment E has been provided as part of this ABAL submittal providing detailed information of SoCalGas' PY 2021 program level changes.

SoCalGas provides the following discussion regarding significant program changes (i.e., more than 40 percent change in funding) that are necessary to better align with programs offered, meet expected energy savings, and target a forecasted TRC of 1.25, shown in Table 4.

Table 4: SoCalGas Program Changes for PY 2021

Program Number	Program Name	Program Change Description
SCG3705	RES-Home Upgrade Program	In late 2019, a new marketing strategy focusing on management company portfolios, instead of individual property owners, allowed for a steady project pipeline. Some of these projects will see installation completion in 2020. Property managers currently participating through the program are interested in pursuing additional upgrades in 2021 for new property locations. Further,

		SoCalGas and Los Angeles Department of Water and Power (LADWP) are working on expanding their marketing efforts for this program to continue providing joint projects. This effort is expected to bring in new program interest in 2021.
SCG3706	RES-Residential HVAC	New SW program to launch in 2021, SoCalGas will allocate decreased budget to fund existing local program during the transition.
SCG3764	Res-LivingWise	Due to the continued effects of the COVID-19 pandemic, SoCalGas will increase LivingWise's budget to expand customer engagement in the residential market to reach students and educate families about EE in this time of need.
SCG3765	Res-Manufactured Mobile Home	While a new local program will launch after the completion of the current third-party solicitation, this existing local program will ramp down. The decreased budget reflects this transition while funding remaining projects.
SCG3834	COM-LADWP Direct Install	SoCalGas will decrease this program budget because of the lack of bundled measures available to customers. SoCalGas hopes to increase its suite of bundled direct-install measures in the near future.
SCG3721	ET-Technology Development Support	New SW Gas and Electric ET programs will launch in 2021, after the completion of the current third-party solicitations. This existing local program will ramp down, and the decreased budget reflects this transition while funding remaining projects.
SCG3722	ET-Technology Assessment Support	New SW Gas and Electric ET programs will launch in 2021, after the completion of the current third-party solicitations. This existing local program will ramp down, and the decreased budget reflects this transition while funding remaining projects.

SCG3723	ET-Technology Introduction Support	New SW Gas and Electric ET programs will launch in 2021, after the completion of the current third-party solicitations. This existing local program will ramp down, and the decreased budget reflects this transition while funding remaining projects.
SCG3714	IND-SEM	SoCalGas is increasing the SEM budget to allocate funding for years 3 and 4 of this program to allow for additional cohorts.
SCG3750	PUB-Orange County Cities Partnership	In 2021, SoCalGas will consolidate North Orange County Cities Partnership (SCG3801) into Orange County Cities Partnership. This program will expand to cover Public Sector customers throughout Orange County.
SCG3809	COM-AB793-CEMTL Program	SoCalGas is decreasing the budget and slowly ramping down this program as it has seen little participation.
SCG3831	RES-EE Kits	Based on the recent evaluation, SoCalGas will reduce this budget to focus on programs that have better installation rates such as the LivingWise program (SCG3764).
SCG3837	PUB-SW-Energy Atlas	This program will continue due to remaining funding commitments to be paid in 2021.
SCG3843	RES-SF Solicitation	Previous placeholder for program solicitation budget, funding increased due to launch of the new third-party program.
SCG3845	COM-SMB Solicitation	Previous placeholder for program solicitation budget, funding increased due to launch of the new third-party program.
SCG_SW_NC_Res	RES-SW-New Construction	There will be a new SW New Construction program launching in 2021. This budget increase is due to the solicitation led by Pacific Gas and Electric Company (PG&E).
SCG_SW_NC_Res_PA	RES-SW-New Construction-PA	SoCalGas is allocating funding to support program administrator

		activities for the new statewide program starting in 2021.
SCG_SW_NC_NonRes_PA	COM-SW-New Construction-PA	SoCalGas is allocating funding to support program administrator activities for the new statewide program starting in 2021.
SCG_SW_CSA_Bldg_PA	C&S-SW-Codes and Standards Advocacy-PA	SoCalGas is allocating funding for administrative activities for the statewide program established in 2020.
SCG_SW_CSA_Appl_PA	C&S-SW-Appliance Standards Advocacy-PA	SoCalGas is allocating funding for administrative activities for the statewide program established in 2020.
SCG_SW_CSA_Natl_PA	C&S-SW-Federal Codes Advocacy-PA	SoCalGas is allocating funding for administrative activities for the statewide program established in 2020.

SoCalGas PY 2021 Program Closures

As part of SoCalGas' portfolio, SoCalGas plans to close the following programs in 2021, shown in Table 5. Given the dynamic changes in EE, these programs no longer contribute to SoCalGas' portfolio cost-effectiveness and goals. Specific justification per program is provided in Table 5.

Table 5: SoCalGas Program Closures for PY 2021

Program Number	Program Name	Reason for Closure
SCG3703	RES-Plug Load and Appliances - POS	To align with D.18-05-041's designation of Plug Load and Appliance (PLA) - Point of Sale (POS) - SCG3703 as a statewide program, SoCalGas will close the program as the new SW program will launch in 2021.
SCG3712	COM-NonRes HVAC	This local program will be closed due to the new SW NonRes HVAC program (SCG_SW_HVAC_Up) starting in 2021.
SCG3724	C&S-Building Codes & Compliance Advocacy	This program will be closed due to the new SW C&S-SW-Building Codes Advocacy (SCG_SW_CSA_Bldg) program in place.
SCG3725	C&S-Appliance Standards Advocacy	This program will be closed due to the new SW C&S-SW-Appliance Standards Advocacy

		(SCG_SW_CSA_Appl) program in place.
SCG3744	PUB - Riverside Co Partnership	In collaboration with Riverside County, SoCalGas will sunset this program at the end of 2020 and merge Riverside County Partnership into Western Riverside Energy Partnership (SCG3783) in PY 2021. SoCalGas remains committed to supporting all Public Sector customers in the region with expanded coverage of Western Riverside Energy Partnership Program (SCG3783).
SCG3745	PUB - San Bernardino Co Partnership	In collaboration with San Bernardino County, SoCalGas will sunset this program at the end of 2020 and merge San Bernardino County Partnership into San Bernardino Regional Partnership (SCG3802) in PY 2021. SoCalGas remains committed to supporting all Public Sector customers in the region with expanded coverage of San Bernardino regional Partnership Program (SCG3802).
SCG3751	PUB - SEEC Partnership	As a result of portfolio balancing processes to achieve mandated minimum cost-effectiveness thresholds, SoCalGas and the other partnering IOUs are sunsetting the Statewide Energy Efficiency Collaborative (SEEC). Over the last few years the IOUs funded the development of tools, which will remain available to local governments through the respective Non-Governmental Organizations (NGOs). Continued success in the SEEC Program requires transition of program leadership to the NGOs of ICLEI for Local Governments, Institute for Local Governments and the Local Government Commission. As of April 2020, the IOUs and NGOs began collaboratively planning on a stakeholder communication plan, program ramp-down and transition of activities that will provide support to local governments as they increase local capacity of EE practices.

SCG3762	RES-CLEO	SoCalGas will close the program as the new local third-party program (SCG3861) will be in place.
SCG3763	RES-MF Direct Therm Savings	SoCalGas will close the program as the new local third-party program (SCG3844) will be in place.
SCG3793	COM-IDEEA365-Instant Rebates! Point-of-Sale Foodservice Rebate Program	SoCalGas will close the program as the new SW program (SCG_SW_FS) will launch in 2021.
SCG3801	PUB - North Orange County Cities Partnership	In collaboration with North Orange County Partners, SoCalGas will sunset this program at the end of 2020 and merge North Orange County Cities Partnership into the Orange County Cities Partnership (SCG3750) in PY 2021. SoCalGas remains committed to supporting all Public Sector customers in North Orange County with expanded coverage of Orange County Cities Partnership Program (SCG3750).
SCG3805	COM-Direct Install Program	SoCalGas will close the program as the new local third-party program (SCG3845) will be in place.
SCG3814	COM-Midstream Water Heating	SoCalGas will close the program as the new SW program (SCG_SW_MCWH) will be in place.
SCG3817	PUB-Direct Install Program	SoCalGas will close the program as the new local third-party program (SCG3846) will be in place.
SCG3819	WE&T-SW-Career & Workforce Readiness	A new program ID is being established for the new SW program which will be in place. As a result, this program placeholder will be closed.
SCG3820	RES-Direct Install Program	SoCalGas will close the program as the new local third-party program (SCG3843) will be in place.
SCG3821	IND-Direct Install Program	SoCalGas will close the program as a new local program will be solicited in the first quarter of 2021. SoCalGas' customers (SCG3843) can utilize other Industrial Sector programs in the interim (SCG3713, SCG3714, SCG3715, SCG3716, and SCG3757).

SoCalGas PY 2021 New Programs

The following programs are the new programs and solicitation placeholders in anticipation of the third-party programs that will be forthcoming through SoCalGas' solicitation efforts as well as the statewide program solicitations.

- SCG3861: Community Language Efficiency Outreach-Direct Install
- SCG3865: AG-Agricultural Solicitation
- SCG3866: COM-Large Commercial Solicitation
- SCG3867: RES-Manufactured Homes Solicitation
- SCG_SW_WET_Work: WE&T Career and Workforce Readiness
- SCG_SW_WET_Work_PA: WE&T Career and Workforce Readiness-PA
- SCG_SW_IP_GOV: Institutional Partnerships: DGS & DoC
- SCG_SW_IP_GOV_PA: Institutional Partnerships: DGS & DoC-PA
- SCG_SW_WET_CC: WE&T Career Connections
- SCG_SW_WET_CC_PA: WE&T Career Connections-PA
- SCG_SW_ETP_GAS: Emerging Technologies, Gas
- SCG_SW_ETP_GAS_PA: Emerging Technologies, Gas-PA
- SCG_SW_FS: Food Service Point Of Sale
- SCG_SW_FS_PA: Food Service Point Of Sale-PA
- SCG_SW_MCWH: Midstream Commercial Water Heating
- SCG_SW_MCWH_PA: Midstream Commercial Water Heating-PA
- SCG_SW_PLA: Plug Load and Appliance
- SCG_SW_PLA_PA: Plug Load and Appliance-PA
- SCG_SW_HVAC_Up – Upstream HVAC (Commercial & Residential)
- SCG_SW_HVAC_Up_PA – Upstream HVAC-PA (Commercial & Residential)

SoCalGas' 2021 Portfolio Budget Caps and Target

Pursuant to OP 13 of D.09-09-047, the Commission determined that administrative costs are limited to 10% of the total authorized EE budget, and ME&O costs have a budget target of 6% of the adopted portfolio budget. SoCalGas has calculated its portfolio caps and targets for its 2021 portfolio and included them in Table 6 below.

Table 6: 2021 EE Portfolio Budget Caps/Targets

Budget Category	Expenditures			Cap & Target Performance		
	Non-Third Party Qualifying Costs (including PA costs and old-definition 3P/GP contracts that don't meet the new definition)	Third Party Qualifying Costs (including SW)	Total Portfolio	Percent of Budget	Cap %	Target %
Administrative Costs						
IOU	\$ 8,597,481	\$ 1,323,829	\$ 9,921,310	8.7%	10.0%	
Third Party & Partnership	\$ 568,938	\$ 1,839,084	\$ 2,408,022			10.0%
Target Exempt Programs	\$ 551,029	\$ 23,889	\$ 574,918			
Marketing and Outreach Costs						
Marketing & Outreach	\$ 3,311,456	\$ 1,873,013	\$ 5,184,469	4.6%		6.0%
Statewide Marketing & Outreach	\$ 1,989,981	\$	\$ 1,989,981			
Direct Implementation Costs						
Direct Implementation (Incentives and Rebates)	\$ 22,392,089	\$ 20,490,457	\$ 42,882,546			
Direct Implementation (Non Incentives and Non Rebates)	\$ 16,100,028	\$ 18,798,091	\$ 34,898,119	30.7%		20.0%
Direct Implementation Target Exempt Programs	\$ 8,783,179	\$ 2,694,953	\$ 11,478,132			
EM&V Costs (Investor Owned Utilities & Energy Division)	\$ 4,421,000	\$	\$ 4,421,000	4.0%	4.0%	
Total	\$ 66,715,182	\$ 47,043,315	\$ 113,758,497			
2021 Proposed Budget	\$ 64,652,234	\$ 47,043,315	\$ 111,695,549			
Third-Party Implementer Contracts/SW Programs (as defined per D.16-08-019, OP 10)		\$ 42,573,205	\$ 42,573,205			

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 2021 is zero.
- Pursuant to D.13-12-038, the Statewide ME&O program costs are excluded from the marketing budget target.
- SoCalGas has calculated the IOU administrative cost cap in accordance with D.09-09-047, OP 13, which excludes associated third-party and local government partnership administrative costs, as well as non-resource programs which meet the requirements as further described in D.09-09-047.¹¹ These programs include EM&V, Marketing and Outreach, Emerging Technologies, Codes & Standards, Workforce Education & Training, and programs supporting market transformation.
- 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, confirms the EM&V budget at 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 EESTATS website.

¹¹ D.09-09-047, at pp. 50-51.

Statewide Programs

Consistent with Energy Division direction, SoCalGas provides the budget allocation for all statewide programs in Attachment C of this ABAL. All of the third-party solicitations for statewide programs where SoCalGas is the statewide lead are in various stages of the solicitation process. These programs are expected to begin implementation in 2021, as such SoCalGas has included a budget in PY 2021 for these specific programs.

When forecasting savings for third-party programs, SoCalGas used the forecasting method used for custom projects, where possible, in compliance with D.19-08-034,¹² otherwise, forecasted savings are based upon available inputs and information from its third-party solicitations and historical program and sector knowledge to inform assumptions and forecasted savings. SoCalGas' savings from statewide third-party programs used the funding share method approved in the Joint IOUs Supplemental Advice Letter of the Shared Funding Mechanism Proposal submitted on November 15, 2018 (San Diego Gas and Electric Company Advice 3268-E-A/2701-G-A; SoCalGas Advice 5346-G-A; SCE Advice 3861-E-A; and PG&E Advice 5373-E-A/4009-G-A).

Supplemental Budget Information

Pursuant to OP 44 of D.18-05-041, SoCalGas must provide its PY Supplemental Energy Efficiency Business Plan Budget Information for 2021. On June 12, 2017, SoCalGas provided its initial supplemental budget information in response to the Scoping Memo and Ruling of Assigned Commissioner and Administrative Law Judge, dated April 14, 2017. The Scoping Ruling directed PAs IOUs and the non-IOU PAs, to submit supplemental budget information using the common budget template developed in consultation with The Utility Reform Network (TURN) and Public Advocates Office (PAO), as well as the PAs. For PY 2021, the supplemental budget information has been incorporated as part of Attachment D.

Metrics

SoCalGas submitted its 2019 sector-level metrics in conjunction with its 2019 EE Annual Report. This information has been incorporated as part of the budget filing appendix submitted on the CEDARS website in the following link: <https://cedars.sound-data.com/documents/download/1878/main/>. Pursuant to D.18-05-041, SoCalGas' 2019 sector-level metrics are also available through SoCalGas' website in the following link: <https://www.socalgas.com/sites/default/files/SCG%202019%20Energy%20Efficiency%20Annual%20Report%20-%205-15-20%20Final.pdf>.¹³

¹² D.19-08-034, at p.30.

¹³ D.18-05-041, at p. 127.

Revenue Requirements

Table 7 below summarizes the revenue requirement impact by class of service. In addition, Attachment A includes a Gas Bill Payer Impacts table comparing current and proposed rates associated with the inclusion of SoCalGas' proposed 2021 budget in its gas transportation rates.

Table 7: Revenue Requirement by Customer Class

Customer Class	Applicable Rate Schedules	Increase/(Decrease) (\$000s)
Core	GR, GS, GM, GO-AC, G-NGVR, GL, G-10, G-AC, G-EN, G-NGV	\$10,322
Non-Core	GT-NC, GT-TLS	\$855
Total		\$11,177

Protests

In accordance with General Order (GO) 96-B, Section 7.5.1 and at the direction of Commission Staff, SoCalGas hereby requests that the protest period be waived.

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 GO 96-B. This submittal is consistent with D.15-10-028 and D.18-05-041. SoCalGas respectfully requests that this submittal be approved on October 1, 2020, the effective date requested in Advice No. 5684.

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 service list should be directed via e-mail to tariffs@socalgas.com or call 213-244-2837. For changes to all other service lists, please contact the Commission's Process Office at 415-703-2021 or via e-mail at Process_Office@cpuc.ca.gov.

/s/ Ronald van der Leeden
Ronald van der Leeden
Director – Regulatory Affairs

Attachments



ADVICE LETTER SUMMARY

ENERGY UTILITY



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

Company name/CPUC Utility No.:

Utility type:

- ELC GAS WATER
 PLC HEAT

Contact Person:

Phone #:
E-mail:
E-mail Disposition Notice to:

EXPLANATION OF UTILITY TYPE

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

(Date Submitted / Received Stamp by CPUC)

Advice Letter (AL) #:

Tier Designation:

Subject of AL:

Keywords (choose from CPUC listing):

AL Type: Monthly Quarterly Annual One-Time Other:

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

Does AL replace a withdrawn or rejected AL? If so, identify the prior AL:

Summarize differences between the AL and the prior withdrawn or rejected AL:

Confidential treatment requested? Yes No

If yes, specification of confidential information:

Confidential information will be made available to appropriate parties who execute a nondisclosure agreement. Name and contact information to request nondisclosure agreement/ access to confidential information:

Resolution required? Yes No

Requested effective date:

No. of tariff sheets:

Estimated system annual revenue effect (%):

Estimated system average rate effect (%):

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

Tariff schedules affected:

Service affected and changes proposed¹:

Pending advice letters that revise the same tariff sheets:

¹Discuss in AL if more space is needed.

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

CPUC, Energy Division
Attention: Tariff Unit
505 Van Ness Avenue
San Francisco, CA 94102
Email: EDTariffUnit@cpuc.ca.gov

Name:
Title:
Utility Name:
Address:
City:
State: Zip:
Telephone (xxx) xxx-xxxx:
Facsimile (xxx) xxx-xxxx:
Email:

Name:
Title:
Utility Name:
Address:
City:
State: Zip:
Telephone (xxx) xxx-xxxx:
Facsimile (xxx) xxx-xxxx:
Email:

ATTACHMENT A

Advice No. 5684-A

Energy Efficiency Program Portfolio

Attachment A - Energy Efficiency Program Portfolio
 PA Name: Southern California Gas Company
 Budget Year: 2021

Table 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 (\$)	
Present Rates - System Average					
2018	\$ -	\$ 1.10066	\$ 71,743,456	\$ 462,464,628	
2019	\$ -	\$ 1.09243	\$ 77,900,162	\$ 382,775,531	
2020	\$ -	\$ 1.25947	\$ 74,096,315	\$ 480,592,413	
2021	\$ -	\$ 1.47653	\$ 95,128,719	\$ 464,413,063	

Note:

1. Average first year gas bill savings is calculated by multiplying an average gas rate with first year gross therm energy savings.
2. 2021 gas average rate based on August 2020 effective rates.
3. Total Average Bill Savings by Year includes C&S Programs.
4. Total Average Lifecycle Bill Savings does not include C&S programs.
5. Average lifecycle gas bill savings is calculated by multiplying an average gas rate with lifecycle gross therm energy savings.

Table 2b - Gas Bill Payer Impacts - Current and Proposed Revenues and Rates, Total and Energy Efficiency, by Customer Class

Customer Classes	2019 Energy Efficiency Gas Annual Revenue Change \$000	2019 Percentage Change In Gas Revenue and Rates	2019 Gas Average Rate \$/therm	2019 Energy Efficiency Portion of Gas Average Rate \$/therm	2020 Energy Efficiency Gas Annual Revenue Change \$000	2020 Percentage Change In Gas Revenue and Rates	2020 Gas Average Rate \$/therm	2021 Proposed Energy Efficiency Gas Annual Revenue Change \$000	2021 Proposed Percentage Change In Gas Revenue and Rates	2021 Gas Average Rate \$/therm	2021 Energy Efficiency Portion of Gas Average Rate \$/therm
Residential	\$ 10,990	0.40%	\$ 1.36152	\$ 0.01663	\$ (3,584)	-0.1%	\$ 1.47974	\$ 4,420	0.1%	\$ 1.47653	\$ 0.01697
Core Commercial/Industrial	\$ 14,380	2.05%	\$ 0.90232	\$ 0.05193	\$ (4,690)	-0.5%	\$ 0.87096	\$ 5,783	0.7%	\$ 0.95883	\$ 0.05302
Gas Air Conditioning	\$ 21	4.87%	\$ 0.76973	\$ 0.09861	\$ (7)	-0.6%	\$ 0.67286	\$ 8	1.6%	\$ 0.67628	\$ 0.10064
Gas Engine	\$ 276	2.54%	\$ 0.68942	\$ 0.04915	\$ (96)	-0.6%	\$ 0.64318	\$ 111	0.8%	\$ 0.62260	\$ 0.05017
Non-Core Commercial/Industrial	\$ 2,126	1.73%	\$ 0.10578	\$ 0.00518	\$ (693)	-0.5%	\$ 0.12870	\$ 855	0.4%	\$ 0.15445	\$ 0.00525

Attachment A - Energy Efficiency Program Portfolio

PA Name: Southern California Gas Company

Budget Year: 2021

Table 3a - Budget and Cost Recovery by Funding Source (\$000's)

	2021
2021 EE Portfolio Budget	\$ 111,696
Unspent/Uncommitted Program Carryover Funds from 2020 ²	\$ -
Unspent/Uncommitted Program Carryover Funds from 2018-2019	\$ 7,264
Total Funding Request for 2021 EE Portfolio	\$ 104,432

Table 3b - Budget by Funding Source (\$000's)

2021 Authorized (Before Carryover)	2021 Budget	Allocation
Electric Procurement EE Funds	\$ -	\$ -
Gas PPP Surcharge Funds	\$ 111,696	\$ 111,696
Total Funds	\$ 111,696	\$ 111,696

Table 3c - Revenue Requirement for Cost Recovery by Funding Source (\$000's)

	2021 Revenue Requirement	Allocation after Carryover adjustment
2021 Authorized Funding in Rates (including carryover)		
Electric Procurement EE Funds	\$ -	\$ -
Gas PPP Surcharge Funds	\$ 104,432	\$ 104,432
Total Funds	\$ 104,432	\$ 104,432

Table 3d - Unspent/Uncommitted Carryover Funds (in positive \$ amounts, \$000's)

Total Unspent/Uncommitted Funds	Electric PGC	Electric Procurement	Total Electric	Gas	Total
2020				\$ 5,000	\$ 5,000
2018-2019				\$ 7,264	\$ 7,264
Total Pre-2021				\$ 12,264	\$ 12,264

EM&V Unspent/Uncommitted Funds	Electric PGC	Electric Procurement	Total Electric	Gas	Total
2020				\$ -	\$ -
2018-2019				\$ -	\$ -
Total Pre-2021				\$ -	\$ -

Program Unspent/Uncommitted Funds	Electric PGC	Electric Procurement	Total Electric	Gas	Total
2020				\$ 5,000	\$ 5,000
2018-2019 ¹				\$ 7,264	\$ 7,264
Total Pre-2021				\$ 12,264	\$ 12,264

Note:

1. Unspent funds from SoCalREN and 3C-REN. Breakout is located on worktab "4 Carryover".
2. \$5,000,000 in SoCalGas's unspent/uncommitted identified for program year 2020 will not be amortized in 2021 but leveraged for Assembly Bill 841 for 2021 School Energy Efficiency Stimulus Program.
3. Funds in Table 3d include \$5,000,000 in 2020 unspent/uncommitted funds for SoCalGas to be leveraged for Assembly Bill 841 for 2021 School Energy Efficiency Stimulus Program.

Attachment A - Energy Efficiency Program Portfolio
PA Name: Southern California Gas Company
Budget Year: 2021

Table 4 – Budget, Spent, Unspent, Carryover Details

New/Existing Program #	Discontinued Program #	Main Program Name / Sub-Program Name	2020 Budget Spent as of 07/31/2020	2021 Proposed Budget	2021 Budget Offset (Expected 2020 Unspent/Uncommitted and Any Remaining Pre-2020 Unspent/Uncommitted Funding) ²	2021 Funds Requested	Program Type	New Business Sector
Residential Programs								
SCG3701		RES-Energy Advisor	\$ 724,163	\$ 776,000		\$ 776,000	Core - SW	Residential
SCG3702		RES-Residential Energy Efficiency Program	\$ 6,899,693	\$ 11,655,724		\$ 11,655,724	Core - SW	Residential
SCG3703	SCG3703	RES-SW-Plug Load and Appliances - POS	\$ 651,152	\$ -		\$ -	Core - SW	Residential
SCG3705		RES-Home Upgrade Program	\$ 559,910	\$ 2,193,000		\$ 2,193,000	Core - SW	Residential
SCG3706		RES-Residential HVAC	\$ 551,286	\$ 500,000		\$ 500,000	Core - SW	Residential
SCG3707		RES-SW-RNC	\$ 531,497	\$ 490,000		\$ 490,000	Core - SW	Residential
SCG3762	SCG3762	RES-CLEO	\$ 135,186	\$ -		\$ -	3P	Residential
SCG3763	SCG3763	RES-MF Direct Therm Savings	\$ 222,024	\$ -		\$ -	3P	Residential
SCG3764		RES-LivingWise	\$ 165,245	\$ 2,503,015		\$ 2,503,015	3P	Residential
SCG3765		RES-Manufactured Mobile Home	\$ 187,559	\$ 330,000		\$ 330,000	3P	Residential
SCG3810		RES-AB793-REMTS Program	\$ 63,621	\$ 828,707		\$ 828,707	3P	Residential
SCG3820	SCG3820	RES-Direct Install Program	\$ 38,097	\$ -		\$ -	3P	Residential
SCG3823		RES-SW-HVAC QI/QM	\$ 40,124	\$ 250,000		\$ 250,000	Core - SW	Residential
SCG3824		RES-Behavioral Program	\$ 3,469,181	\$ 6,721,000		\$ 6,721,000	3P	Residential
SCG3829		RES-Marketplace	\$ 1,037,250	\$ 1,417,500		\$ 1,417,500	3P	Residential
SCG3830		RES-Retail Partnering	\$ 124,877	\$ 760,000		\$ 760,000	Core - SW	Residential
SCG3831		RES-EE Kits	\$ 6,266	\$ 150,000		\$ 150,000	3P	Residential
SCG3832		RES-Pasadena Home Upgrade	\$ 27,105	\$ 447,300		\$ 447,300	3P	Residential
SCG3833		RES-Burbank Home Upgrade	\$ 39,122	\$ 374,525		\$ 374,525	3P	Residential
SCG3836		RES-LADWP HVAC	\$ 85,900	\$ 1,329,300		\$ 1,329,300	3P	Residential
SCG3843		RES-SF Solicitation	\$ 4,975	\$ 2,998,599		\$ 2,998,599	3P	Residential
SCG3844		RES-MF Solicitation	\$ -	\$ 2,042,627		\$ 2,042,627	3P	Residential
SCG_SW_NC_Res		RES-SW-New Construction	\$ -	\$ 442,411		\$ 442,411	Core - SW	Residential
SCG_SW_NC_Res_PA		RES-SW-New Construction-PA	\$ -	\$ 22,120		\$ 22,120	Core - SW	Residential
SCG3861		RES-Community Language Efficiency Outreach-Direct Instal	\$ -	\$ 1,166,123		\$ 1,166,123	3P	Residential
SCG3867		RES-MH Solicitation	\$ -	\$ 2,502,450		\$ 2,502,450	3P	Residential
SCG_SW_PLA		RES-SW-Plug Load and Appliance	\$ -	\$ 606,100		\$ 606,100	Core - SW	Residential
SCG_SW_PLA_PA		RES-SW-Plug Load and Appliance-PA	\$ -	\$ 9,901		\$ 9,901	Core - SW	Residential
Commercial Programs								
SCG3708		COM-Energy Advisor	\$ 195,793	\$ 307,000		\$ 307,000	Core - SW	Commercial
SCG3710		COM-Calculated Incentives	\$ 873,763	\$ 3,092,000		\$ 3,092,000	Core - SW	Commercial
SCG3711		COM-Deemed Incentives	\$ 2,361,247	\$ 4,612,640		\$ 4,612,640	Core - SW	Commercial
SCG3712	SCG3712	COM-NonRes HVAC Upstream	\$ 24,202	\$ -		\$ -	Core - SW	Commercial
SCG3793	SCG3793	COM-Instant Rebates! Foodservice POS	\$ 1,346,364	\$ -		\$ -	3P	Commercial
SCG3805	SCG3805	COM-Direct Install Program	\$ 892,637	\$ -		\$ -	3P	Commercial
SCG3809		COM-AB793-CEMTL Program	\$ 24,482	\$ 3,000		\$ 3,000	3P	Commercial
SCG3813		COM-Savings By Design	\$ 257,643	\$ 578,000		\$ 578,000	Core - SW	Commercial
SCG3814	SCG3814	COM-Midstream Water Heating	\$ 833,987	\$ -		\$ -	Core - SW	Commercial
SCG3825		COM-HVAC QI/QM	\$ -	\$ 41,000		\$ 41,000	Core - SW	Commercial
SCG3834		COM-LADWP Direct Install	\$ 8,699	\$ 76,810		\$ 76,810	3P	Commercial
SCG3835		COM-Pasadena Direct Install	\$ -	\$ 76,470		\$ 76,470	3P	Commercial
SCG3845		COM-Small/Medium Solicitation	\$ -	\$ 3,469,704		\$ 3,469,704	3P	Commercial
SCG_SW_NC_NonRes		COM-SW-New Construction (SCG_SW_NC_NonRes)	\$ -	\$ 167,200		\$ 167,200	Core - SW	Commercial
SCG_SW_NC_NonRes_PA		COM-SW-New Construction-PA (SCG_SW_NC_NonRes_PA)	\$ -	\$ 16,720		\$ 16,720	Core - SW	Commercial
SCG3866		COM-Large Solicitation	\$ -	\$ 5,229,547		\$ 5,229,547	3P	Commercial
SCG_SW_FS		COM-SW-Food Service Point of Sale	\$ -	\$ 2,945,664		\$ 2,945,664	Core - SW	Commercial
SCG_SW_FS_PA		COM-SW-Food Service Point of Sale-PA	\$ -	\$ 216,787		\$ 216,787	Core - SW	Commercial
SCG_SW_MCWH		COM-SW-Midstream Commercial Water Heating	\$ -	\$ 3,118,565		\$ 3,118,565	Core - SW	Commercial
SCG_SW_MCWH_PA		COM-SW-Midstream Commercial Water Heating-PA	\$ -	\$ 202,845		\$ 202,845	Core - SW	Commercial
SCG_SW_HVAC_Up		COM-SW-Upstream HVAC	\$ -	\$ 864,586		\$ 864,586	Core - SW	Commercial

SCG SW HVAC Up_PA		COM-SW-Upstream HVAC-PA		\$ 86,459	\$ 86,459	Core - SW	Commercial
Public Programs							
SCG3815		PUB-Calculated Incentives	\$ 108,220	\$ 1,320,000	\$ 1,320,000	Core - SW	Public
SCG3816		PUB-Deemed Incentives	\$ 363,487	\$ 1,501,000	\$ 1,501,000	Core - SW	Public
SCG3817	SCG3817	PUB-Direct Install Program	\$ 19,751	\$ -	\$ -	3P	Public
SCG3818		PUB-SW-Water/Wastewater Pumping Program	\$ -	\$ -	\$ -	Core - SW	Public
SCG3837		PUB-SW-Energy Atlas	\$ -	\$ -	\$ -	Core - SW	Public
SCG3846		PUB-SM Solicitation	\$ -	\$ 1,936,000	\$ 1,936,000	3P	Public
Industrial Programs							
SCG3713		IND-Energy Advisor	\$ 71,722	\$ 255,000	\$ 255,000	Core - SW	Industrial
SCG3714		IND-SEM	\$ 327,270	\$ 2,032,000	\$ 2,032,000	Core - SW	Industrial
SCG3715		IND-Calculated Incentives	\$ 1,260,244	\$ 8,045,000	\$ 8,045,000	Core - SW	Industrial
SCG3716		IND-Deemed Incentives	\$ 568,574	\$ 1,332,000	\$ 1,332,000	Core - SW	Industrial
SCG3757		IND-Small Industrial Facility Upgrades	\$ 75,849	\$ 799,264	\$ 799,264	3P	Industrial
SCG3821	SCG3821	IND-Direct Install Program	\$ -	\$ -	\$ -	3P	Industrial
Agricultural Programs							
SCG3717		AG-Energy Advisor	\$ 21,731	\$ 58,000	\$ 58,000	Core - SW	Agricultural
SCG3719		AG-Calculated Incentives	\$ 301,916	\$ 959,000	\$ 959,000	Core - SW	Agricultural
SCG3720		AG-Deemed Incentives	\$ 250,355	\$ 1,100,000	\$ 1,100,000	Core - SW	Agricultural
SCG3865		AG-Agricultural Solicitation	\$ -	\$ 3,003,422	\$ 3,003,422	3P	Agricultural
Emerging Technologies Programs							
SCG3721		ET-Technology Development Support	\$ 123,037	\$ 69,357	\$ 69,357	Core - SW	ET
SCG3722		ET-Technology Assessment Support	\$ 237,532	\$ 329,015	\$ 329,015	Core - SW	ET
SCG3723		ET-Technology Introduction Support	\$ 229,970	\$ 387,329	\$ 387,329	Core - SW	ET
SCG SW ETP Gas		ET-SW-Emerging Technologies, Gas	\$ -	\$ 731,500	\$ 731,500	Core - SW	ET
SCG SW ETP Gas PA		ET-SW-Emerging Technologies, Gas-PA	\$ -	\$ 10,800	\$ 10,800	Core - SW	ET
Codes & Standards Programs							
SCG3724	SCG3724	C&S-SW-Building Codes & Compliance Advocacy	\$ -	\$ -	\$ -	Core - SW	C&S
SCG3725	SCG3725	C&S-SW-Appliance Standards Advocacy	\$ -	\$ -	\$ -	Core - SW	C&S
SCG3726		C&S-Compliance Enhancement	\$ 67,814	\$ 582,000	\$ 582,000	Core - SW	C&S
SCG3727		C&S-Reach Codes	\$ 20,814	\$ 143,000	\$ 143,000	Core - SW	C&S
SCG3728		C&S-Planning Coordination	\$ 23,283	\$ 310,000	\$ 310,000	Core - SW	C&S
SCG SW CSA Bldg		C&S-SW-Building Codes Advocacy	\$ -	\$ 470,226	\$ 470,226	Core - SW	C&S
SCG SW CSA Appl		C&S-SW-Appliance Standards Advocacy	\$ -	\$ 331,024	\$ 331,024	Core - SW	C&S
SCG SW CSA Natl		C&S-SW-Federal Codes Advocacy	\$ -	\$ 298,509	\$ 298,509	Core - SW	C&S
SCG SW CSA Bldg PA		C&S-SW-Building Codes Advocacy-PA	\$ -	\$ 1,553	\$ 1,553	Core - SW	C&S
SCG SW CSA Appl PA		C&S-SW-Appliance Standards Advocacy-PA	\$ -	\$ 2,507	\$ 2,507	Core - SW	C&S
SCG SW CSA Natl PA		C&S-SW-Federal Codes Advocacy-PA	\$ -	\$ 1,439	\$ 1,439	Core - SW	C&S
Workforce Education & Training Programs							
SCG3729		WE&T-Integrated Energy Efficiency Training	\$ 1,207,342	\$ 3,250,000	\$ 3,250,000	Core - SW	WE&T
SCG3730		WE&T-Connections	\$ 141,106	\$ 291,000	\$ 291,000	Core - SW	WE&T
SCG3760		WE&T-HERS Rater Training Advancement	\$ 140,706	\$ 308,000	\$ 308,000	3P	WE&T
SCG3819	SCG3819	WE&T-SW-Career & Workforce Readiness	\$ -	\$ -	\$ -	Core - SW	WE&T
SCG SW WET Work		WE&T-SW-WE&T Career and Workforce Readiness	\$ -	\$ 103,023	\$ 103,023	Core - SW	WE&T
SCG SW WET Work PA		WE&T-SW-WE&T Career and Workforce Readiness-PA	\$ -	\$ 5,151	\$ 5,151	Core - SW	WE&T
SCG SW WET CC		WE&T-SW-WE&T Career Connections	\$ -	\$ 48,767	\$ 48,767	Core - SW	WE&T
SCG SW WET CC PA		WE&T-SW-WE&T Career Connections-PA	\$ -	\$ 2,439	\$ 2,439	Core - SW	WE&T
Financing Programs							
SCG3735		FIN-On-Bill Financing	\$ 109,370	\$ 650,000	\$ 650,000	Core - SW	Finance
Institutional Partnership Programs							
SCG3738		PUB-CA Department of Corrections Partnership	\$ 63,166	\$ 190,570	\$ 190,570	Govt Partnerships	Public
SCG3739		PUB- California Community College Partnership	\$ 84,639	\$ 240,103	\$ 240,103	Govt Partnerships	Public
SCG3740		PUB-UC/CSU/IOU Partnership	\$ 89,650	\$ 308,179	\$ 308,179	Govt Partnerships	Public
SCG3741		PUB-State of CA/IOU Partnership	\$ 55,364	\$ 196,139	\$ 196,139	Govt Partnerships	Public
SCG SW IP Gov		PUB-SW-Institutional Partnership: DGS & DoC	\$ -	\$ 34,833	\$ 34,833	Govt Partnerships	Public
SCG SW IP Gov PA		PUB-SW-Institutional Partnerships: DGS & DoC-PA	\$ -	\$ 1,741	\$ 1,741	Govt Partnerships	Public
Government Partnership Programs							
SCG3742		PUB-LA Co Partnership	\$ 69,499	\$ 180,107	\$ 180,107	Govt Partnerships	Public
SCG3744	SCG3744	PUB-Riverside Co Partnership	\$ 39,809	\$ -	\$ -	Govt Partnerships	Public
SCG3745	SCG3745	PUB-San Bernardino Co Partnership	\$ 41,839	\$ -	\$ -	Govt Partnerships	Public
SCG3746		PUB-Santa Barbara Co Partnership	\$ 68,821	\$ 127,070	\$ 127,070	Govt Partnerships	Public
SCG3747		PUB-South Bay Cities Partnership	\$ 50,693	\$ 151,554	\$ 151,554	Govt Partnerships	Public
SCG3748		PUB-San Luis Obispo Co Partnership	\$ 57,386	\$ 92,206	\$ 92,206	Govt Partnerships	Public
SCG3749		PUB-San Joaquin Valley Partnership	\$ 73,249	\$ 113,007	\$ 113,007	Govt Partnerships	Public
SCG3750		PUB-Orange County Cities Partnership	\$ 43,525	\$ 256,467	\$ 256,467	Govt Partnerships	Public
SCG3751	SCG3751	PUB-SEEC Partnership	\$ 22,000	\$ -	\$ -	Govt Partnerships	Public
SCG3754		PUB-Ventura County Partnership	\$ 75,511	\$ 202,737	\$ 202,737	Govt Partnerships	Public
SCG3755		PUB-Public Sector EE Innovation	\$ -	\$ 356,258	\$ 356,258	Govt Partnerships	Public

SCG3773		PUB-Public Sector Resource	\$ 1,838	\$ 583,424		\$ 583,424	Govt Partnerships	Public
SCG3774		PUB-LG Regional Resource	\$ 211,375	\$ 453,000		\$ 453,000	Govt Partnerships	Public
SCG3776		PUB-Gateway Cities Partnership	\$ 54,500	\$ 152,576		\$ 152,576	Govt Partnerships	Public
SCG3777		PUB-San Gabriel Valley COG Partnership	\$ 84,667	\$ 166,896		\$ 166,896	Govt Partnerships	Public
SCG3779		PUB-West Side Community Energy Partnership	\$ 85,423	\$ 151,194		\$ 151,194	Govt Partnerships	Public
SCG3783		PUB-Western Riverside Energy Partnership	\$ 61,834	\$ 245,945		\$ 245,945	Govt Partnerships	Public
SCG3801	SCG3801	PUB-North Orange County Cities Partnership	\$ 56,351	\$ -		\$ -	Govt Partnerships	Public
SCG3802		PUB-San Bernardino Regional Energy Partnership	\$ 37,598	\$ 200,994		\$ 200,994	Govt Partnerships	Public
Other Programs						\$ -		
SCG3771		SOL-Innovative Designs for Energy Efficiency Activities (IDEEA365	\$ 763,982	\$ 1,080,000		\$ 1,080,000	Other	Cross Cutting
SCG3775	SCG3775	CRM	\$ -	\$ -		\$ -	Other	Cross Cutting
		SoCalGas PROGRAM TOTAL	\$ 30,245,860	\$ 101,773,721	\$ -	\$ 101,773,721		
EM&V (SoCal Gas & CPUC Portions)								
SCG3772		EM&V (Total)	\$ 152,968	\$ 4,421,000	\$ -	\$ 4,421,000		
		EM&V - CPUC		\$ 3,205,225	\$ -	\$ 3,205,225	EM&V	EM&V
		EM&V - PA		\$ 1,153,433	\$ -	\$ 1,153,433	EM&V	EM&V
		EM&V - SoCalREN	\$ 42,852	\$ -	\$ -	\$ 42,852	EM&V	EM&V
		EM&V - 3C-REN		\$ 19,490	\$ -	\$ 19,490	EM&V	EM&V
		SoCalGas TOTAL with EM&V	\$ 30,398,828	\$ 106,194,722	\$ -	\$ 106,194,722		
Regional Energy Networks (REN)								
		SoCalREN	\$ 1,370,071	\$ 3,781,116	\$ 6,367,014	\$ (2,585,898)	REN	Cross Cutting
		3C-REN	\$ 529,318	\$ 1,719,711	\$ 896,566	\$ 823,145	REN	Cross Cutting
		TOTAL SoCal Gas EE PORTFOLIO	\$ 32,298,217	\$ 111,695,549	\$ 7,263,580	\$ 104,431,969		

Note:

1. The requested budget for PY2021 does not include the program budget for the SoCalGas Statewide Marketing, Education & Outreach (ME&O) program or the program budget for the Statewide Financing Pilots. The program year 2021 budgets for these programs were approved in D.13-09-044 and D.19-01-005, respectively.

2. \$5,000,000 in SoCalGas's unspent/uncommitted identified for program year 2020 will not be amortized in 2021 but leveraged for Assembly Bill 841 for 2021 School Energy Efficiency Stimulus Program. The \$5,000,000 in unspent/uncommitted is not included on this table since it is not being amortized for 2021 revenue requirement.

Attachment A - Energy Efficiency Program Portfolio
PA Name: Southern California Gas Company
Budget Year: 2021

Table 5 - Total 2021 Requested and 2017-2020 Revenue Collected (\$000's).

Category (2017-20 Authorized ¹ and 2021 Request)	Electric Demand Response Funds	Electric Energy Efficiency Funds	Natural Gas Public Purpose Funds	Total Energy Efficiency Funds
2017 Program Funds - Utility			\$ 76,019	\$ 76,019
2017 Program Funds - SoCalREN			\$ 4,337	\$ 4,337
2017 Program Funds - 3C-REN			\$ -	\$ -
2017 EM&V			\$ 3,348	\$ 3,348
2017 Annualized Total			83,704	83,704
2018 Program Funds - Utility			\$ 94,647	\$ 94,647
2018 Program Funds - SoCalREN			\$ 3,257	\$ 3,257
2018 Program Funds - 3C-REN			\$ -	\$ -
2018 EM&V			\$ 4,166	\$ 4,166
2018 Annualized Total			102,070	102,070
2019 Program Funds - Utility			\$ 97,696	\$ 97,696
2019 Program Funds - SoCalREN			\$ 3,473	\$ 3,473
2019 Program Funds - 3C-REN			\$ 1,193	\$ 1,193
2019 EM&V ²			\$ 4,265	\$ 4,265
2019 Annualized Total			\$ 106,627	\$ 106,627
2020 Program Funds - Utility			\$ 99,728	\$ 99,728
2020 Program Funds - SoCalREN			\$ 3,666	\$ 3,666
2020 Program Funds - 3C-REN			\$ 1,253	\$ 1,253
2020 EM&V ²			\$ 4,336	\$ 4,336
2020 Annualized Total			\$ 108,983	\$ 108,983
2021 Program Funds - Utility			\$ 101,774	\$ 101,774
2021 Program Funds - SoCalREN			\$ 3,781	\$ 3,781
2021 Program Funds - 3C-REN			\$ 1,720	\$ 1,720
2021 EM&V ²			\$ 4,421	\$ 4,421
2021 Annualized Total			\$ 111,696	\$ 111,696

Note:

1. Authorized budget excludes reductions from past unspent funds, 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.
2. Includes EM&V budgets for SoCalREN and/or 3C-REN.

Attachment A - Energy Efficiency Program Portfolio
 PA Name: Southern California Gas Company
 Budget Year: 2021

Table 6 - Committed Energy Efficiency Program Funding - Funds Not Yet Spent as of 7/31/2020

Accrued funds not yet spent (\$000's). Category	Electric Procurement Funds	Natural Gas Public Purpose Funds	Total
2017 to date EM&V Funds		\$0	\$0
2017 to date Program Funds - Utility		\$2,111	\$2,111
2017 to date Program Funds - REN		\$0	\$0
2017 to date Program Funds - 3C-REN		\$0	\$0
2018 to date EM&V Funds		\$3,379	\$3,379
2018 to date Program Funds - Utility		\$8,079	\$8,079
2018 to date Program Funds - REN		\$0	\$0
2018 to date Program Funds - 3C-REN		\$0	\$0
2019 to date EM&V Funds		\$3,514	\$3,514
2019 to date Program Funds - Utility		\$3,615	\$3,615
2019 to date Program Funds - REN		\$0	\$0
2019 to date Program Funds - 3C-REN		\$0	\$0
2020 to date EM&V Funds		\$4,183	\$4,183
2020 to date Program Funds - Utility		\$67,502	\$67,502
2020 to date Program Funds - REN		\$2,296	\$2,296
2020 to date Program Funds - 3C-REN		\$723	\$723

Attachment A - Energy Efficiency Program Portfolio
PA Name: Southern California Gas Company
Budget Year: 2021

Table 7 - 2020 Authorized Spend and Spent/Unspent Detail

Authorized, spent and unspent program funds (excludes EM&V) (\$000's)	Electric Procurement Funds	Natural Gas Public Purpose Funds	Total
Category			
2020 Annualized Authorized Program Spending Budget		\$ 104,647	\$ 104,647
2020 Actual Spent ¹		\$ 32,145	\$ 32,145
2020 Unspent			
2020 Committed funds ²		\$ 67,502	\$ 67,502
2020 Unspent/uncommitted - estimated available for 2021 ³		\$ 5,000	\$ 5,000
2018-2019 Unspent/uncommitted - estimated available for 2021 ⁴		\$ 7,264	\$ 7,264

Note:

1. Actual spent means funds expensed, including accruals and payments made on previous year commitments as of July 31, 2020.
2. 2020 Commitments funds as of July 2020.
3. \$5,000,000 in SoCalGas's unspent/uncommitted identified for program year 2020 will not be amortized in 2021 but leveraged for Assembly Bill 841 for 2021 School Energy Efficiency Stimulus Program.
4. Funds to be amortized in 2021 rates.

ATTACHMENT B

Advice No. 5684-A

**California Energy Database and Reporting System
SoCalGas Submittal Receipt**

CEDARS FILING SUBMISSION RECEIPT

The SCG portfolio filing has been submitted and is now under review. A summary of the filing is provided below.

PA: Southern California Gas (SCG)

Filing Year: 2021

Submitted: 00:16:47 on 24 Nov 2020

By: Paul Deang

Advice Letter Number: 5684

* Portfolio Filing Summary *

- TRC: 1.6027
- PAC: 3.4899
- TRC (no admin): 2.2798
- PAC (no admin): 9.8783
- RIM: 3.4899
- Budget: \$106,194,721.94

* Programs Included in the Filing *

- SCG3701: RES-Energy Advisor
- SCG3702: RES-Residential Energy Efficiency Program
- SCG3705: RES-Home Upgrade Program
- SCG3706: RES-Residential HVAC
- SCG3707: RES-RNC
- SCG3708: COM-Energy Advisor
- SCG3710: COM-Calculated Incentives
- SCG3711: COM-Deemed Incentives
- SCG3713: IND-Energy Advisor
- SCG3714: IND-SEM
- SCG3715: IND-Calculated Incentives
- SCG3716: IND-Deemed Incentives
- SCG3717: AG-Energy Advisor
- SCG3719: AG-Calculated Incentives
- SCG3720: AG-Deemed Incentives
- SCG3721: ET-Technology Development Support
- SCG3722: ET-Technology Assessment Support

- SCG3723: ET-Technology Introduction Support
- SCG3726: C&S-Compliance; Enhancement
- SCG3727: C&S-Reach; Codes
- SCG3728: C&S-Planning; Coordination
- SCG3729: WE&T-Integrated; Energy Efficiency Training
- SCG3730: WE&T-Connections;
- SCG3735: FIN-On-Bill Financing
- SCG3738: PUB-CA Department of Corrections Partnership
- SCG3739: PUB-California Community College Partnership
- SCG3740: PUB-UC/CSU/IOU Partnership
- SCG3741: PUB-State of CA/IOU Partnership
- SCG3742: PUB-LA Co Partnership
- SCG3746: PUB-Santa Barbara Co Partnership
- SCG3747: PUB-South Bay Cities Partnership
- SCG3748: PUB-San Luis Obispo Co Partnership
- SCG3749: PUB-San Joaquin Valley Partnership
- SCG3750: PUB-Orange County Cities Partnership
- SCG3754: PUB-Ventura County Partnership
- SCG3755: PUB-Public Sector EE Innovation
- SCG3757: IND-Small Industrial Facility Upgrades
- SCG3760: WE&T-HERS; Rater Training Advancement
- SCG3764: RES-LivingWise
- SCG3765: RES-Manufactured Mobile Home
- SCG3771: SOL-IDEEA365
- SCG3772: EM&V-Evaluation; Measurement & Verification
- SCG3773: PUB-Public Sector Resource
- SCG3774: PUB-LG Regional Resource
- SCG3776: PUB-Gateway Cities Partnership
- SCG3777: PUB-San Gabriel Valley COG Partnership
- SCG3779: PUB-West Side Community Energy Partnership
- SCG3783: PUB-Western Riverside Energy Partnership
- SCG3802: PUB-San Bernardino Regional Energy Partnership
- SCG3809: COM-AB793-CEMTL Program
- SCG3810: RES-AB793-REMTS Program
- SCG3813: COM-Savings By Design
- SCG3815: PUB-Calculated Incentives
- SCG3816: PUB-Deemed Incentives
- SCG3818: PUB-SW-Water/Wastewater Pumping Program
- SCG3823: RES-HVAC QI/QM
- SCG3824: RES-Behavioral Program
- SCG3825: COM-HVAC QI/QM
- SCG3829: RES-Marketplace

- SCG3830: RES-Retail Partnering
- SCG3831: RES-EE Kits
- SCG3832: RES-Pasadena Home Upgrade
- SCG3833: RES-Burbank Home Upgrade
- SCG3834: COM-LADWP Direct Install
- SCG3835: COM-Pasadena Direct Install
- SCG3836: RES-LADWP HVAC
- SCG3837: PUB-SW-Energy Atlas
- SCG3843: RES-SF Solicitation
- SCG3844: RES-MF Solicitation
- SCG3845: COM-SMB Solicitation
- SCG3846: PUB-SM Solicitation
- SCG3861: RES-Community Language Efficiency Outreach-Direct Install
- SCG3865: AG-Agricultural Solicitation
- SCG3866: COM-Large Solicitation
- SCG3867: RES-MH Solicitation
- SCG-ESAP: Energy Savings Assistance Program
- SCG-ESPI: ESPI Incentives
- SCG-GRCL: GRC Labor Loaders
- SCG_SW_CSA_Appl: C&S-SW-Appliance; Standards Advocacy
- SCG_SW_CSA_Appl_PA: C&S-SW-Appliance; Standards Advocacy-PA
- SCG_SW_CSA_Bldg: C&S-SW-Building; Codes Advocacy
- SCG_SW_CSA_Bldg_PA: C&S-SW-Building; Codes Advocacy-PA
- SCG_SW_CSA_Natl: C&S-SW-Federal; Codes Advocacy
- SCG_SW_CSA_Natl_PA: C&S-SW-Federal; Codes Advocacy-PA
- SCG_SW_ETP_Gas: ET-SW-Emerging Technologies Program, Gas
- SCG_SW_ETP_Gas_PA: ET-SW-Emerging Technologies Program, Gas-PA
- SCG_SW_FS: COM-SW-Food Service Point of Sale
- SCG_SW_FS_PA: COM-SW-Food Service Point of Sale-PA
- SCG_SW_HVAC_Up: COM-SW-Upstream HVAC
- SCG_SW_HVAC_Up_PA: COM-SW-Upstream HVAC-PA
- SCG_SW_IP_Gov: PUB-SW-Institutional Partnership: DGS & DoC
- SCG_SW_IP_Gov_PA: PUB-SW-Institutional Partnerships: DGS & DoC-PA
- SCG_SW_MCWH: COM-SW-Midstream Commercial Water Heating
- SCG_SW_MCWH_PA: COM-SW-Midstream Commercial Water Heating-PA
- SCG_SW_NC_NonRes: COM-SW-New Construction
- SCG_SW_NC_NonRes_PA: COM-SW-New Construction-PA
- SCG_SW_NC_Res: RES-SW-New Construction
- SCG_SW_NC_Res_PA: RES-SW-New Construction-PA
- SCG_SW_PLA: RES-SW-Plug Load and Appliance
- SCG_SW_PLA_PA: RES-SW-Plug Load and Appliance-PA
- SCG_SW_WET_CC: WE&T-SW-WE;&T; Career Connections

- SCG_SW_WET_CC_PA: WE&T-SW-WE;&T; Career Connections-PA
- SCG_SW_WET_Work: WE&T-SW-WE;&T; Career and Workforce Readiness
- SCG_SW_WET_Work_PA: WE&T-SW-WE;&T; Career and Workforce Readiness-PA

ATTACHMENT C

Advice No. 5684-A

**Joint IOUs Shared Funding Allocations
for Statewide Programs**

ATTACHMENT D

Advice No. 5684-A

**Southern California Gas Company
Supplemental Budget Information Pursuant to D.18-05-041**

Appendix A - Supplemental 2021 Energy Efficiency Budget Information

**Appendix B - SoCalGas Management and Organizational Supporting
Energy Efficiency**

Appendix C - SoCalGas Third-Party Program Solicitation Schedule

2020 Supplemental Energy Efficiency Budget Information

Pursuant to Ordering Paragraph 44 of Decision (D.) 18-05-041, the Commission directed the Program Administrators (PAs) to include the supplemental budget information in their Annual Budget Advice Letters beginning with the September 3, 2019 advice letters.¹ SoCalGas hereby provides its supplemental budget information, with the following understanding:

1. Budgets adopted in this proceeding should be indicative of expected PA activities until the Rolling Portfolio Energy Efficiency (EE) market structure has reached a steady state. Budget allocation for administrative functions should be flexible to accommodate process improvements that become necessary as the new market structure evolves.
2. The PAs must retain flexibility to manage their EE programs and costs to achieve maximum efficiencies. That is, PAs may adjust in-house EE organizational structure, including staffing level and budgets, without prior Commission or Commission staff approval, so long as changes are documented so that this information can inform future review of proposed administrative budgets.

With this understanding in mind, Appendix A to this document includes SoCalGas' supplemental budget information, using the common budget template developed in consultation with TURN and ORA as well as the PAs. Appendix A provides the following information (to the extent available, and subject to all noted qualifiers, caveats, and disclaimers):

- **Description of in-house EE organizational structure and associated costs.**
- **The number of full-time equivalent employees for 2019 (current) and 2021 (projected) EE Programs.**
- **Costs by functional area of management structure.**
- **How much of each year's budget SoCalGas anticipates spending "in-house" (e.g., for administration, non-outsourced direct implementation, other non-incentive costs, marketing), by sector and by crosscutting program.**
- **Explanation of allocation of labor and O&M costs between EE-functions and other non-EE functions.**

This document consists of: (1) a "narrative outline," populated with responses; (2) Appendix A (budget-related information); (3) Appendix B (organizational chart); (4) and Appendix C (solicitation schedule).

¹ D.18-05-041, OP 44.

I. DESCRIPTION OF IN-HOUSE EE ORGANIZATIONAL STRUCTURE & ASSOCIATED COSTS

1. Functions conducted by each department/organization.

Response:

The following is a list of functions conducted by SoCalGas departments supporting EE programs, as shown in the organizational chart in Appendix B.

- Customer Strategy and Engagement Department – Provides support for the marketing and outreach of EE programs.
- Market Development – Manages emerging technology projects.
- Commercial and Industrial Services – Provides account executive support for energy efficiency projects with large SoCalGas nonresidential customers.
- Customer Programs and Assistance (CP&A) – Provides overall EE program management, which includes program administration, the third-party solicitation process, design, implementation, contract management, and product and channel management for all sectors. CP&A also provides overall policy, finance and accounting, strategy, compliance, audits, regulatory support, data analytics, evaluation, measurement and verification (EM&V), product review, and management of evaluation studies.

2. Management structure and org chart.

Response:

Please see Appendix B.

3. Staffing needs by department/organization, including current and forecast for 2021, as well as a description of what changes are expected in the near term or why it's impossible to predict beyond 2021, if that's the PA's position.

Response:

SoCalGas provides the requested information regarding its staffing needs, both current (2019) and estimated (2021) by function at the aggregated category in Appendix A. SoCalGas' Business Plan outlines a solicitation strategy that is to be conducted in three phases between now and 2022 to obtain new program designs based on strategies proposed in the Business Plan. It is currently unknown to what extent programs and vendor contracts developed through this effort will impact SoCalGas' organization or staffing needs.

4. Non-program functions currently performed by contractors (e.g. advisory consultants), as well as a description of what changes are expected in the near term or why it's impossible to predict beyond 2021, if that's the PA's position.

Response:

SoCalGas currently utilizes consultants to provide portfolio support, including regulatory, program/process design, and solicitation management. As mentioned above, it is currently unknown to what extent SoCalGas' current organization, staffing, and reliance on consultants will continue until the solicitation strategy is fully implemented and new energy efficiency programs are designed and launched.

5. Anticipated drivers of in-house cost changes by department/organization.

Response:

As mentioned above, it is currently unknown to what extent SoCalGas' current organization, staffing, and reliance on consultants will continue until the solicitation strategy is fully implemented and new energy efficiency programs are designed and launched.

6. Explanation of method for forecasting costs.

Response:

SoCalGas' 2021 budget is based on the Commission-authorized budget set in D.18-05-041.² Method of forecasting cost for SoCalGas include evaluated historical portfolio, program, and cost category performance, as well as market sector forecasts to identify the potential goal to develop the proposed budget.

² See D. 18-05-041.

B. Table showing PA EE “Full Time Equivalent” headcount by department/organization

1. TURN and ORA like this example, taken from testimony PG&E’s 2017 GRC addressing its Energy Procurement department. We would be looking for 2018 or 2017 “recorded” positions, depending on what’s most appropriate for the PA, or both, if that provides the most clarity. For forecast years, we’d want at least 2020.
 - Note, if PA’s FTE needs change, these changes can be made without reporting or seeking CPUC approval.

**TABLE 6-3(a)
 EP HEADCOUNT
 NUMBER OF PLANNED POSITIONS**

Line No.	Description	2014 Positions	2015 Forecast	2016 Forecast	2017 Forecast
1	EP Administrative Office	4	4	4	4
2	Energy Supply Management (ESM)	126	131	131	134
3	Renewable Energy (RE)	38	40	40	41
4	Energy Policy, Planning and Analysis (EPPA)	46	46	46	46
5	Value Based Reliability (VBR)	10	12	12	12
6	Energy Contract Management and Settlements (ECMS)	79	80	80	80
7	Energy Compliance and Reporting (ECR)	18	18	18	18
8	Total	321	331	331	335

(a) See WP Table 6-7, Exhibit (PG&E-5).

Response:

SoCalGas does not track or forecast FTEs at this granular level for EE programs or in its Business Plan. Notwithstanding, SoCalGas has made a good-faith effort to provide an approximate FTE breakdown in the manner requested. Please see the information provided in Appendix A, Portfolio Headcount (FTE) table.

C. Table showing costs by functional area of management structure

1. Expenses broken out into labor, non-labor O&M (with contract labor identified).

Response:

Please see the information provided in Appendix A.

2. Identify any capital costs.

Response:

SoCalGas' capital costs are not part of the EE portfolio budget.

D. Table showing cost drivers across the EE organization

1. TURN and ORA like this example, taken from testimony PG&E's 2017 GRC addressing its Energy Procurement department. While this example pertains to departmental cost increases, in our case, cost increases or decreases would be attributed to major cost drivers.

TABLE 6-2(a)
 EP COST INCREASE
 2015-2017 EXPENSE BY COST DRIVER

Line No.	Description	Increase in Thousands of \$	Percent of Total Increase
1	Escalation	3,597	57
2	Portfolio Complexity	1,138	18
3	Regulatory Mandates	1,192	19
4	Process Improvements	400	6
5	Total	6,324	100

(a) See WP Table 6-6, Exhibit (PG&E-5).

Response:

SoCalGas does not forecast EE budgets in a manner similar or comparable to a forecast as prepared in a General Rate Case (GRC). Notwithstanding, SoCalGas makes a good faith effort to provide the information in the manner requested. The 2021 program year budget increase of \$3.9M against 2020 is attributed to new programs from solicitations and the increased focus on hard-to-reach customers, to achieve the portfolio's goal.

E. Explanation of allocation of labor and O&M costs between EE-functions and GRC-functions or other non-EE functions

1. When an employee spends less than 100% of her/his time on EE, how are costs tracked and recovered (e.g., on a pro rata basis between EE rates and GRC rates; when time exceeds a certain threshold, all to EE; etc.).

Response:

SoCalGas uses its accounting tracking system, including designated internal order numbers for each program cost category, to track the costs associated with EE programs. Using SoCalGas' time keeping system (MyTime), an employee records the actual hours of work performed on EE programs. MyTime is used to record, review, and approve the actual time spent on EE programs bi-weekly, which is reviewed for accuracy monthly.

2. Describe the method used to determine the proportion charged to EE balancing accounts for all employees who also do non-EE work.

Response:

As mentioned above, MyTime uses EE-designated program cost category internal order numbers to track actual hours worked on EE. The designated EE internal order numbers are then used to capture EE costs to the EE DSMBA balancing account.

3. Identify the EE functions that are most likely to be performed by employees who also do non-EE work (e.g. Customer Account Representatives?)

Response:

The EE functions that are most likely to be performed by employees who also do non-EE work are Information Technology, Account Management, and Marketing.

4. Are labor costs charged to EE fully loaded?

Response:

Only labor loaders for Vacation & Sick and Payroll Taxes are charged to EE.

5. How are burden benefit-related A&G expenses for employees who work on EE programs recovered (EE rates or GRC rates)? **PG&E allocates these costs to EE pursuant to a settlement agreement with MCE and TURN, which was adopted in D.14-08-032.

Response:

SoCalGas does not forecast EE budgets in a manner similar or comparable to a forecast as prepared in a GRC. Any benefit-related A&G items outside of Vacation & Sick and Payroll Taxes are recovered through the GRC.

6. When EE and non-EE activities are supported by the same non-labor resources, how are the costs of those resources or systems allocated to EE and non-EE activities?

Response:

For non-labor resources supporting both EE and non-EE, the costs charged to EE program are based on the actual cost incurred associated with the approved scope of work related to the EE program.

7. Identify the EE O&M costs that are most likely to be spread to non-EE functions as well as EE, if any.

Response:

EE allowable O&M costs are identified in Energy Efficiency Policy Manual Version 6 and D.09-09-047. These identified costs are specific to EE program cost category in nature and therefore, they do not spread to non-EE functions.

II. BUDGET TABLES INCLUDING INFORMATION IDENTIFIED IN THE SCOPING MEMO

A. Attachment-A, Question C.8

“Present a single table summarizing energy savings targets, and expenditures by sector (for the six specified sectors). This table should enable / facilitate assessment of relative contributions of the sectors to savings targets, and relative cost-effectiveness.”

Response:

Please see Appendix A, Portfolio Summary table.

B. Attachment-A, Question C.9

“Using a common budget template developed in consultation with interested stakeholders (hopefully agreed upon at a “meet and confer” session), display how much of each year’s budget each PA anticipates spending “in-house” (e.g., for administration, non-outsourced direct implementation, other non-incentive costs, marketing), by sector and by cross-cutting program.”

Response:

Please see Appendix A, Residential table and similar tables for all other sectors: Commercial, Industrial, Agricultural, Public Sector and Cross-cutting.

C. Attachment-A, Question C.10

“Present a table akin to PG&E’s Figure 1.9 (Portfolio Overview, p 37) or SDG&E’s Figure 1.10 (p. 23) that not only shows anticipated solicitation schedule of “statewide programs” by calendar year and quarter, but also expected solicitation schedule of local third-party solicitations, by sector, and program area (latter to extent known, and/or by intervention strategy if that is more applicable). For both tables, and for each program entry on the calendar, give an approximate size of budget likely to be available for each solicitation (can be a range).”

Response:

Please see Appendix C. As described in SoCalGas' Business Plan, SoCalGas has planned for three phases of open solicitation. This schedule includes budget ranges for solicitations in each phase, based on current budgets for programs in these sectors. Solicitation budgets will be dependent on program designs, and thus, the budget ranges are intended to be illustrative.

III. CONCLUSION

This completes SoCalGas' Supplemental Energy Efficiency Business Plan Budget information in response to D.18-05-041.

Attachment D
Appendix A - Supplemental 2021 EE Budget Information
PA Name: Southern California Gas Company
Budget Year: 2021

FUNCTION DEFINITIONS TABLE

Aggregated Category	Definition	Functional Category	Detailed Definition
Policy, Strategy, and Regulatory Reporting Compliance	Includes policy, strategy, compliance, audits and regulatory support	Planning & Compliance	DSM Goal Planning; lead legislative review/positioning; policy support on reg proceedings; portfolio optimization; end use-market strategy; DSM lead for PRP, DRP, ES; locational targeting; audit support; SOX certifications; developing control plans; developing action plans; continuous monitoring; inspections program/product QA/QC; decision compliance oversight/tracking; data requests; policies & procedures
		Company Regulatory Support	Case management for EE proceedings
Program management	Includes labor, contracts, admin costs for program design, program implementation, product and channel management for all sectors	Program Management & Delivery	Market Segment & Locational Resource programs; Business Core & Finance Programs; Large Power DR Programs; Non-Res HVAC & Technical Services; Program Integration & Optimization; Residential EE & DR Programs (incl. Res HVAC QI); IQP & Economic Assistance Programs; Mass Market DR Programs; Education & Information Products & Services; Energy Leader Partnerships; Institutional & Federal Partnerships; REN Coordination; Strategic Plan Support; Energy/Water Program Mgt; Service Level Agreement Tracking
		Product Management	Manage end-to-end new products and services (P&S) intake, evaluation, and launch process; develop and facilitate P&S governance teams, coordination of all sub-process owners, stakeholders, and technical resources required to evaluate and launch new products; evaluate and launch new services and OOR opportunities; develop external partnerships & strategic alliances; work with various companies and associations to help advance standards, products, and tech.; work with external experts to help reduce SCE costs to deliver new prog. and products; develop and launch new customer technologies, products, services for residential and business customers; conduct customer pilots of new technologies and programs; lead customer field demonstrations of new technologies and products; align new P&S to savings programs/incentives; develop new programs/incentives in support of savings goals
		Channel Management	
		Contract Management	Budget forecasting, spend tracking, invoice processing, and contract management with vendors and suppliers; Regulatory support for ME&O activities
Engineering Services	Includes engineering, project management, and contracts associated with workpaper development and pre/post sales project technical reviews and design assistance	Custom project support	Management of Emerging Products projects; Customized reviews; LCR/RFO support; Ex-ante review management; Technical policy support; Technical assessments; Workpapers; Tool development; End use subject matter expertise
		Deemed workpapers	
		Project management	
Customer Application/Rebate and Incentive Processing	Costs associated with application management and rebate and incentive processing (deemed and custom)	Rebate & Application Processing	
Inspections	Costs associated with project inspections	Inspections	
Portfolio Analytics	Includes analytics support, including internal performance reporting and external reporting	Data analytics	Data development for programs, products and services; Standard and ad hoc data extracts for internal and external clients ; Database management; CPUC, CAISO reporting; Data reconciliation; E3 support ; Compliance filing support; Funding Oversight; ESPI support; Program Results Data & Performance
EM&V	EM&V expenditures	EM&V Studies	Program and product review; manage evaluation studies
		EM&V Forecasting	EE lead for LTPP and IEPR; market potential study; integration w/ procurement planning; CPUC Demand Analysis Working Group
ME&O	Costs associated with utility EE marketing; no statewide; focus on outsourced portion	Marketing	Customer Programs, Products, and Services Marketing; Digital Product Development; Digital Content & Optimization
		Customer insights	Voice of the Customer; Customer satisfaction study measurement and analysis (JD Power, SDS); Customer testing/research
Account Management / Sales	Costs associated with account rep energy efficiency sales functions	Account Management	
IT	IT project specific costs and regular O&M	IT - project specific	Projects and minor enhancements. Includes project management/business integration ("PMO/BID"). Excluded: maintenance (which SCE defines as when something goes down, normal batch processing, verifying interfaces, etc.).
		IT - regular O&M	
Call Center	Costs associated with call center staff fielding EE program questions	Call Center	
Incentives	Costs of rebate and incentive payments to customers	Incentives	

Attachment D
Appendix A - Supplemental 2021 EE Budget Information
PA Name: Southern California Gas Company
Budget Year: 2021

PORTFOLIO SUMMARY TABLE

Sector	2019 EE Portfolio Expenditures (\$000's)				2021 EE Portfolio Budget (\$000's)				2019 EE Portfolio Savings			2021 EE Portfolio Forecasted Savings		
	Labor	Non-Labor (excl. Incentives)	Incentives	Total	Labor	Non-Labor (excl. Incentives)	Incentives	Total	KWH	KW	THERMS	KWH	KW	THERMS
Residential	\$ 5,198	\$ 18,232	\$ 26,925	\$ 50,355	\$ 5,940	\$ 13,799	\$ 20,778	\$ 40,516	8,439,961	1,911	15,625,174	5,820,511	533	15,003,072
Commercial	\$ 4,070	\$ 5,712	\$ 15,237	\$ 25,019	\$ 4,843	\$ 9,914	\$ 10,348	\$ 25,105	36,234	3	3,728,184	1,488,401	646	3,389,488
Agricultural	\$ 894	\$ 67	\$ 275	\$ 1,236	\$ 1,086	\$ 2,147	\$ 1,887	\$ 5,120	70,365	-	249,021	71,564	-	1,110,098
Industrial	\$ 2,912	\$ 706	\$ 641	\$ 4,259	\$ 3,593	\$ 2,131	\$ 6,739	\$ 12,463	-	-	489,536	-	-	4,458,415
Public (GP)	\$ 2,418	\$ 1,052	\$ 961	\$ 4,431	\$ 2,444	\$ 3,588	\$ 3,130	\$ 9,162	1,453	-	997,521	2,921	1	1,511,472
Cross Cutting*	\$ 4,502	\$ 1,212	\$ -	\$ 5,714	\$ 3,747	\$ 5,659	\$ -	\$ 9,407	-	-	32,951,406	-	-	21,116,134
Total Sector Budget	\$ 19,994	\$ 26,981	\$ 44,040	\$ 91,015	\$ 21,652	\$ 37,239	\$ 42,883	\$ 101,774	8,548,013	1,914	54,040,842	7,383,396	1,181	46,588,678
EM&V-PA	\$ 205	\$ 113		\$ 318.09	\$ 125	\$ 1,091		\$ 1,216						
EM&V-ED		\$ 135		\$ 134.54		\$ 3,205		\$ 3,205						
OBF - Loan Pool**														
EE Total***	\$ 20,199	\$ 27,228	\$ 44,040	\$ 91,467	\$ 21,777	\$ 41,535	\$ 42,883	\$ 106,195	8,548,013	1,914	54,040,842	7,383,396	1,181	46,588,678

* Cross Cutting Sector includes Codes & Standards, Emerging Technologies, Workforce Education & Training, On-Bill Financing, and IDEEA 365 Sol.

** For SoCalGas, the loan pool is not part of the authorized EE portfolio budget and is collected and tracked through a separate account.

***Total excludes energy savings from the Energy Savings Assistance (ESA) Program

A. → Attachment A, Question C.8

“Present a single table summarizing energy savings targets, and expenditures by sector (for the six specified sectors). This table should enable/facilitate assessment of relative contributions of the sectors to savings targets, and relative cost-effectiveness.”

- → TURN and ORA invite the PAs to propose a common table format for this information. We don't have anything specific in mind.
- → Additionally, include a brief description of the method used by the PA to estimate the costs presented in the C.8 Table.

Attachment D
 Appendix A - Supplemental 2021 EE Budget Information
 PA Name: Southern California Gas Company
 Budget Year: 2021

PORTFOLIO STAFFING TABLE

Functional Group	2019 EE Portfolio FTE ⁽¹⁾	2021 EE Portfolio FTE ⁽¹⁾
Policy, Strategy, and Regulatory Reporting Compliance	11.6	10.2
Program Management	86.7	80.5
Engineering Services	19.8	19.8
Customer Application/Rebate/Incentive Processing	10.6	10.5
Customer Project Inspections	2.8	2.8
Portfolio Analytics	1.0	1.0
EM&V	1.0	1.0
ME&O (Local)	13.5	13.5
Account Management / Sales	25.8	28.4
IT	3.0	2.5
Call Center	2.1	2.1
Total	177.9	172.2

Notes:

(1) FTE is equal to productive labor of 1788 hour per year.

||
A. → Narrative description of in-house departments/organizations supporting the PA's EE portfolio

¶

- → Functions conducted by each department/organization¶
- → Management structure and org chart¶
- → Staffing needs by department/organization, including current and forecast for 2018, as well as a description of what changes are expected in the near term (2019-2020) or why it's impossible to predict beyond 2018, if that's the PA's position.¶
- → Non-program functions currently performed by contractors (e.g. advisory consultants), as well as a description of what changes are expected in the near term (2019-2020) or why it's impossible to predict beyond 2018, if that's the PA's position.¶
- → Anticipated drivers of in-house cost changes by department/organization¶
- → Explanation of method for forecasting costs¶

¶

¶

B. → Table showing PA EE headcount by department/organization

¶

- → TURN and ORA like this example, taken from testimony PG&E's 2017 GRC addressing its Energy Procurement department. We would be looking for 2016 or 2017 "recorded" positions, depending on what's most appropriate for the PA, or both, if that provides the most clarity. For forecast years, we'd want at least 2018.¶

Attachment D
Appendix A - Supplemental 2021 EE Budget Information
PA Name: Southern California Gas Company
Budget Year: 2021

RESIDENTIAL BUDGET DETAIL TABLE

Sector	Cost Element	Functional Group	2019 EE Portfolio Expenditures (\$000's)	2021 EE Portfolio Budget (\$000's) ⁽²⁾
Residential	Labor ⁽¹⁾	Policy, Strategy, and Regulatory Reporting Compliance	\$ 708	\$ 1,462
		Program Management	\$ 2,725	\$ 1,874
		Engineering services	\$ 256	\$ 97
		Customer Application/Rebate/Incentive Processing	\$ 665	\$ 1,059
		Customer Project Inspections	\$ 171	\$ -
		Portfolio Analytics	\$ 47	\$ -
		ME&O (Local)	\$ 525	\$ 1,276
		Account Management / Sales	\$ -	\$ -
		IT	\$ 47	\$ 3
		Call Center	\$ 54	\$ 169
	Labor Total		\$ 5,198	\$ 5,940
	Non-Labor	Third-Party Implementer (as defined per D.16-08-019, OP 10)	\$ -	\$ 11,419
		Local/Government Partnerships Contracts	\$ -	\$ -
		Other Contracts	\$ -	\$ -
		Program Implementation	\$ 14,551	\$ 1,355
		Policy, Strategy, and Regulatory Reporting Compliance	\$ 792	\$ -
		Program Management	\$ 645	\$ 940
		Engineering services	\$ 195	\$ 3
		Customer Application/Rebate/Incentive Processing	\$ 940	\$ 80
		Customer Project Inspections	\$ -	\$ -
		Portfolio Analytics	\$ -	\$ -
		ME&O (Local)	\$ 1,008	\$ 2
		Account Management / Sales	\$ -	\$ -
		IT	\$ 102	\$ -
		Call Center	\$ -	\$ -
		Facilities	\$ -	\$ -
		Incentives--(PA-implemented and Other Contracts Program Implementation) Programs	\$ 26,925	\$ 9,603
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)	\$ -	\$ 11,175
	Non-Labor Total		\$ 45,158	\$ 34,577
Residential Total			\$ 50,355	\$ 40,516
	Other (collected through GRC) ⁽³⁾	Labor Overheads	\$ 1,544	\$ 2,269

Notes:

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- (2) Estimated 2021 budget may change based on the implementation of the solicitation strategy.
- (3) The labor P&B costs are collected through GRC

C. → Table showing costs by functional area of management structure

- → Expenses broken out into labor, non-labor O&M (with contract labor identified)
- → Identify any capital costs

B. → Attachment A, Question C.9

“Using a common budget template developed in consultation with interested stakeholders (hopefully agreed upon at a “meet and confer” session), display how much of each year’s budget each PA anticipates spending “in-house” (e.g., for administration, non-outsourced direct implementation, other non-incentive costs, marketing), by sector and by cross-cutting program.”

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- → Additionally, include a brief description of the method used by the PA to estimate the costs presented in the C.9 Table.

Attachment D
Appendix A - Supplemental 2021 EE Budget Information
PA Name: Southern California Gas Company
Budget Year: 2021

COMMERCIAL BUDGET DETAIL TABLE

Sector	Cost Element	Functional Group	2019 EE Portfolio Expenditures (\$000's)	2021 EE Portfolio Budget (\$000's) ⁽²⁾
Commercial	Labor ⁽¹⁾	Policy, Strategy, and Regulatory Reporting Compliance	\$ 539	\$ 513
		Program Management	\$ 1,440	\$ 1,556
		Engineering services	\$ 837	\$ 925
		Customer Application/Rebate/Incentive Processing	\$ 114	\$ 106
		Customer Project Inspections	\$ 11	\$ -
		Portfolio Analytics	\$ -	\$ -
		ME&O (Local)	\$ 224	\$ 750
		Account Management / Sales	\$ 895	\$ 960
		IT	\$ -	\$ 10
		Call Center	\$ 10	\$ 22
	Labor Total		\$ 4,070	\$ 4,843
	Non-Labor	Third-Party Implementers Contracts (as defined per D.16-08-019, OP 10)	\$ -	\$ 7,776
		Local/Government Partnerships Contracts	\$ -	\$ -
		Other Contracts	\$ -	\$ -
		Program Implementation	\$ 1,613	\$ 142
		Policy, Strategy, and Regulatory Reporting Compliance	\$ 572	\$ -
		Program Management	\$ 2,380	\$ 1,397
		Engineering services	\$ 298	\$ 370
		Customer Application/Rebate/Incentive Processing	\$ 119	\$ 229
		Customer Project Inspections	\$ -	\$ -
		Portfolio Analytics	\$ -	\$ -
		ME&O (Local)	\$ 729	\$ -
		Account Management / Sales	\$ -	\$ -
		IT	\$ -	\$ -
		Call Center	\$ -	\$ -
		Facilities	\$ -	\$ -
		Incentives--(PA-implemented and Other Contracts Program Implementation) Programs	\$ 15,237	\$ 2,334
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)	\$ -	\$ 8,014
	Non-Labor Total		\$ 20,949	\$ 20,262
Commercial Total ⁽⁵⁾			\$ 25,019	\$ 25,105
	Other (collected through GRC) ⁽³⁾	Labor Overheads	\$ 1,263	\$ 1,856

Notes:

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- (2) Estimated 2021 budget may change based on the implementation of the solicitation strategy.
- (3) The labor P&B costs are collected through GRC

C. → Table showing costs by functional area of management structure

- → Expenses broken out into labor, non-labor O&M (with contract labor identified)
- → Identify any capital costs

B. → Attachment A, Question C.9

“Using a common budget template developed in consultation with interested stakeholders (hopefully agreed upon at a meet and confer session), display how much of each year’s budget each PA anticipates spending “in-house” (e.g., for administration, non-outsourced direct implementation, other non-incentive costs, marketing), by sector and by cross-cutting program.”

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Attachment D
Appendix A - Supplemental 2021 EE Budget Information
PA Name: Southern California Gas Company
Budget Year: 2021

INDUSTRIAL BUDGET DETAIL TABLE

Sector	Cost Element	Functional Group	2019 EE Portfolio Expenditures (\$000's)	2021 EE Portfolio Budget (\$000's) ⁽²⁾
Industrial	Labor ⁽¹⁾	Policy, Strategy, and Regulatory Reporting Compliance	\$ 132	\$ 189
		Program Management	\$ 651	\$ 736
		Engineering services	\$ 703	\$ 794
		Customer Application/Rebate/Incentive Processing	\$ 56	\$ 44
		Customer Project Inspections	\$ 2	\$ -
		Portfolio Analytics	\$ -	\$ -
		ME&O (Local)	\$ 174	\$ 540
		Account Management / Sales	\$ 1,187	\$ 1,264
		IT	\$ -	\$ 1
		Call Center	\$ 8	\$ 26
	Labor Total		\$ 2,912	\$ 3,593
	Non-Labor	Third-Party Implementers Contracts (as defined per D.16-08-019, OP 10)	\$ -	\$ 290
		Local/Government Partnerships Contracts	\$ -	\$ -
		Other Contracts	\$ -	\$ -
		Program Implementation	\$ 78	\$ 87
		Policy, Strategy, and Regulatory Reporting Compliance	\$ 173	\$ -
		Program Management	\$ 284	\$ 1,595
		Engineering services	\$ 38	\$ 112
		Customer Application/Rebate/Incentive Processing	\$ 110	\$ 48
		Customer Project Inspections	\$ -	\$ -
		Portfolio Analytics	\$ -	\$ -
		ME&O (Local)	\$ 23	\$ -
		Account Management / Sales	\$ -	\$ -
		IT	\$ -	\$ -
		Call Center	\$ -	\$ -
		Facilities	\$ -	\$ -
		Incentives--(PA-implemented and Other Contracts Program Implementation) Programs	\$ 641	\$ 6,305
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)	\$ -	\$ 434
	Non-Labor Total		\$ 1,347	\$ 8,871
Industrial Total			\$ 4,259	\$ 12,463
	Other (collected through GRC) ⁽³⁾	Labor Overheads	\$ 1,055	\$ 1,551

Notes:

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- (2) Estimated 2021 budget may change based on the implementation of the solicitation strategy.
- (3) The labor P&B costs are collected through GRC

C. → Table showing costs by functional area of management structure¶

- ¶
- → Expenses broken out into labor, non-labor O&M (with contract labor identified)¶
- → Identify any capital costs¶

B. → Attachment A, Question C.9¶

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“Using a common budget template developed in consultation with interested stakeholders (hopefully agreed upon at a “meet and confer” session), display how much of each year’s budget each PA anticipates spending “in-house” (e.g., for administration, non-outsourced direct implementation, other non-incentive costs, marketing), by sector and by cross-cutting program.”¶

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Attachment D
Appendix A - Supplemental 2021 EE Budget Information
PA Name: Southern California Gas Company
Budget Year: 2021

AGRICULTURAL BUDGET DETAIL TABLE

Sector	Cost Element	Functional Group	2019 EE Portfolio Expenditures (\$000's)	2021 EE Portfolio Budget (\$000's) ⁽²⁾
Agricultural	Labor ⁽¹⁾	Policy, Strategy, and Regulatory Reporting Compliance	\$ 41	\$ 92
		Program Management	\$ 278	\$ 308
		Engineering services	\$ 179	\$ 216
		Customer Application/Rebate/Incentive Processing	\$ 34	\$ 20
		Customer Project Inspections	\$ 1	\$ -
		Portfolio Analytics	\$ -	\$ -
		ME&O (Local)	\$ 120	\$ 179
		Account Management / Sales	\$ 233	\$ 260
		IT	\$ -	\$ -
		Call Center	\$ 8	\$ 11
	Labor Total		\$ 894	\$ 1,086
	Non-Labor	Third-Party Implementers Contracts (as defined per D.16-08-019, OP 10)	\$ -	\$ 1,802
		Local/Government Partnerships Contracts	\$ -	\$ -
		Other Contracts	\$ -	\$ -
		Program Implementation	\$ 6	\$ -
		Policy, Strategy, and Regulatory Reporting Compliance	\$ 38	\$ -
		Program Management	\$ 0	\$ 267
		Engineering services	\$ 9	\$ 57
		Customer Application/Rebate/Incentive Processing	\$ 2	\$ 22
		Customer Project Inspections	\$ -	\$ -
		Portfolio Analytics	\$ -	\$ -
		ME&O (Local)	\$ 12	\$ -
		Account Management / Sales	\$ -	\$ -
		IT	\$ -	\$ -
		Call Center	\$ -	\$ -
		Facilities	\$ -	\$ -
		Incentives--(PA-implemented and Other Contracts Program Implementation) Programs	\$ 275	\$ 689
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)	\$ -	\$ 1,198
	Non-Labor Total		\$ 342	\$ 4,035
Agricultural Total			\$ 1,236	\$ 5,120
	Other (collected through GRC) ⁽³⁾	Labor Overheads	\$ 325	\$ 477

Notes:

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C. → Table showing costs by functional area of management structure¶

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- → Expenses broken out into labor, non-labor O&M (with contract labor identified)¶
- → Identify any capital costs¶

B. → Attachment A, Question C.9¶

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Attachment D
Appendix A - Supplemental 2021 EE Budget Information
PA Name: Southern California Gas Company
Budget Year: 2021

PUBLIC SECTOR BUDGET DETAIL TABLE

Sector	Cost Element	Functional Group	2019 EE Portfolio Expenditures (\$000's)	2021 EE Portfolio Budget (\$000's) ⁽²⁾
Public Sector	Labor ⁽¹⁾	Policy, Strategy, and Regulatory Reporting Compliance	\$ 133	\$ 152
		Program Management	\$ 1,863	\$ 2,078
		Engineering services	\$ 146	\$ 72
		Customer Application/Rebate/Incentive Processing	\$ 2	\$ 1
		Customer Project Inspections	\$ -	\$ -
		Portfolio Analytics	\$ -	\$ -
		ME&O (Local)	\$ 38	\$ 30
		Account Management / Sales	\$ 236	\$ 83
		IT	\$ -	\$ 27
		Call Center	\$ -	\$ -
	Labor Total		\$ 2,418	\$ 2,444
	Non-Labor	Third-Party Implementers Contracts (as defined per D.16-08-019, OP 10)	\$ -	\$ 415
		Local/Government Partnerships Contracts	\$ 700	\$ 3,173
		Other Contracts	\$ -	\$ -
		Program Implementation	\$ 95	\$ -
		Policy, Strategy, and Regulatory Reporting Compliance	\$ 131	\$ -
		Program Management	\$ -	\$ -
		Engineering services	\$ 22	\$ -
		Customer Application/Rebate/Incentive Processing	\$ 2	\$ -
		Customer Project Inspections	\$ -	\$ -
		Portfolio Analytics	\$ -	\$ -
		ME&O (Local)	\$ 102	\$ -
		Account Management / Sales	\$ -	\$ -
		IT	\$ -	\$ -
		Call Center	\$ -	\$ -
		Facilities	\$ -	\$ -
		Incentives--(PA-implemented and Other Contracts Program Implementation) Programs	\$ -	\$ 1,510
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)	\$ 961	\$ 1,620
	Non-Labor Total		\$ 2,013	\$ 6,718
Public Sector Total			\$ 4,431	\$ 9,162
	Other (collected through GRC) ⁽³⁾	Labor Overheads	\$ 809	\$ 1,188

Notes:

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C. → Table showing costs by functional area of management structure¶

- ¶
- → Expenses broken out into labor, non-labor O&M (with contract labor identified)¶
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Attachment D
Appendix A - Supplemental 2021 EE Budget Information
PA Name: Southern California Gas Company
Budget Year: 2021

CROSS-CUTTING BUDGET DETAIL TABLE

Sector	Cost Element	Functional Group	2019 EE Portfolio Expenditures (\$000's)	2021 EE Portfolio Budget (\$000's) ⁽²⁾
Cross Cutting	Labor ⁽¹⁾	Policy, Strategy, and Regulatory Reporting Compliance	\$ 3	\$ 166
		Program Management	\$ 4,008	\$ 3,299
		Engineering services	\$ 26	\$ 23
		Customer Application/Rebate/Incentive Processing	\$ -	\$ -
		Customer Project Inspections	\$ -	\$ -
		Portfolio Analytics	\$ 159	\$ -
		ME&O (Local)	\$ 297	\$ 250
		Account Management / Sales	\$ -	\$ 2
		IT	\$ 9	\$ 7
		Call Center	\$ -	\$ -
	Labor Total		\$ 4,502	\$ 3,747
	Non-Labor	Third-Party Implementers Contracts (as defined per D.16-08-019, OP 10)	\$ -	\$ 1,983
		Local/Government Partnerships Contracts	\$ -	\$ -
		Other Contracts	\$ -	\$ -
		Program Implementation	\$ 428	\$ 1,178
		Policy, Strategy, and Regulatory Reporting Compliance	\$ -	\$ -
		Program Management	\$ 639	\$ 2,499
		Engineering services	\$ -	\$ -
		Customer Application/Rebate/Incentive Processing	\$ -	\$ -
		Customer Project Inspections	\$ -	\$ -
		Portfolio Analytics	\$ 133	\$ -
		ME&O (Local)	\$ 11	\$ -
		Account Management / Sales	\$ -	\$ -
		IT	\$ 1	\$ -
		Call Center	\$ -	\$ -
		Facilities	\$ -	\$ -
		Incentives--(PA-implemented and Other Contracts Program Implementation) Programs	\$ -	\$ -
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)	\$ -	\$ -
	Non-Labor Total		\$ 1,212	\$ 5,659
Cross Cutting Total			\$ 5,714	\$ 9,407
	Other (collected through GRC) ⁽³⁾	Labor Overheads	\$ 1,240	\$ 1,822

Notes:

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C. → Table showing costs by functional area of management structure¶

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- → Expenses broken out into labor, non-labor O&M (with contract labor identified)¶
- → Identify any capital costs¶

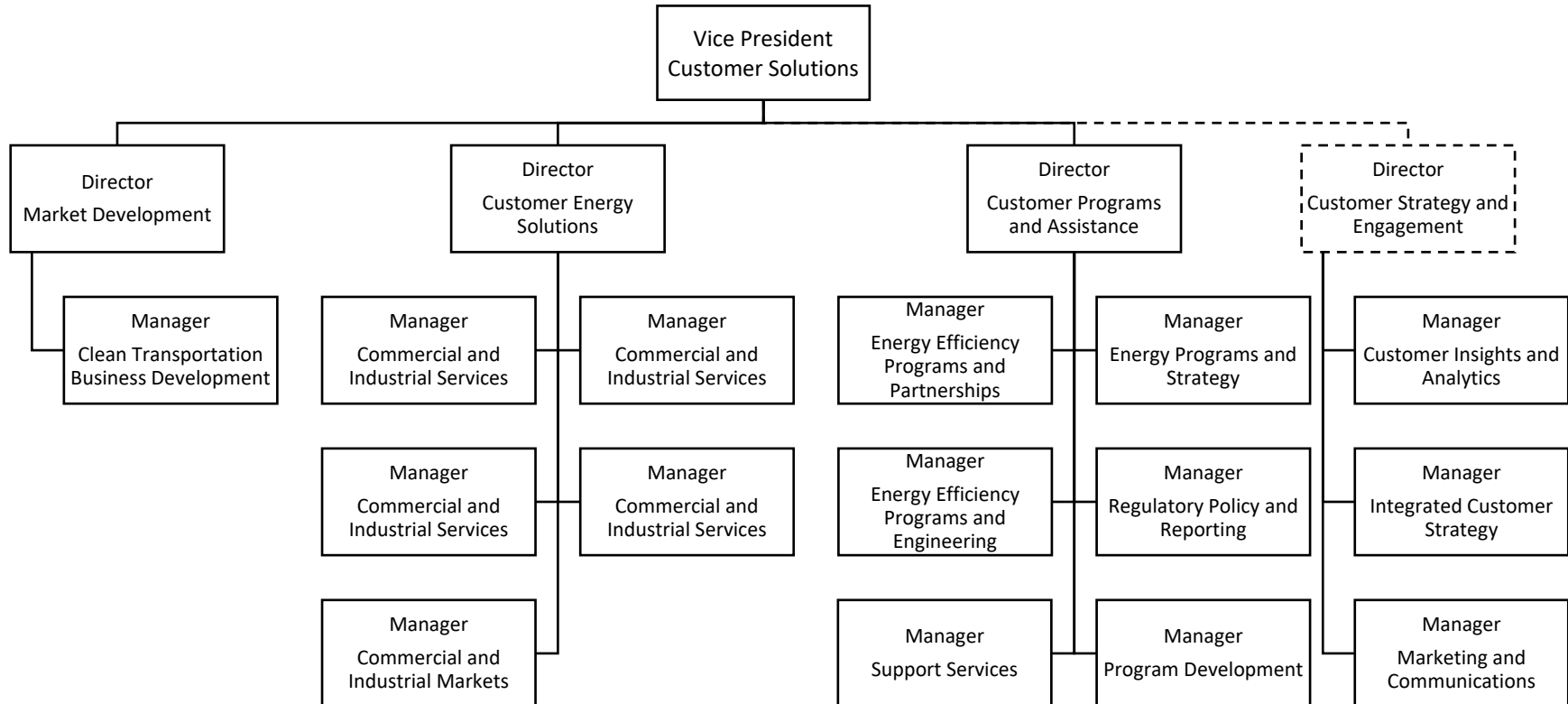
B. → Attachment A, Question C.9¶

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Appendix B - SoCalGas Management Structure Supporting Energy Efficiency



Appendix C - SoCalGas Third -Party Program Solicitation Schedule

SCG Energy Efficiency Solicitation Timeline
Schedule as of 11/1/2020 (Schedule may be subject to change at IOU's discretion)

IOU	Year		2019												2020												2021												2022											
	Quarter	Month	Q1			Q2			Q3			Q4			Q1			Q2			Q3			Q4			Q1			Q2			Q3			Q4														
			Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
SoCalGas	Local - Residential	Residential Single Family	RFP Prep						RFP			Contract Negotiation																																						
SoCalGas	Local - Residential	Residential Multifamily	RFP Prep						RFP			Contract Negotiation																																						
SoCalGas	Local - Commercial	Small & Medium Commercial	RFA			RFP Prep			RFP			Contract Negotiation																																						
SoCalGas	Local - Public	Small & Medium Public	RFA			RFP Prep			RFP			Contract Negotiation																																						
SoCalGas	Statewide - Commercial	Point of Sale Food Service	RFA Prep						RFA			RFP Prep			RFP			Contract Negotiation																																
SoCalGas	Statewide - Commercial	Midstream Water Heating	RFA Prep						RFA			RFP Prep			RFP			Contract Negotiation																																
SoCalGas	Statewide - Cross Cutting	Gas Emerging Technologies							RFA Prep						RFA			RFP Prep			RFP			Contract Negotiation																										
SoCalGas	Local - Residential	Manufactured Housing (Re-issue RFA)							RFA Prep			RFA			RFP Prep			RFP			Contract Negotiation																													
SoCalGas	Local - Commercial	Large Commercial							RFA Prep			RFA			RFP Prep			RFP			Contract Negotiation																													
SoCalGas	Local - Agricultural	Agricultural Sector							RFA Prep			RFA			RFP Prep			RFP			Contract Negotiation																													
SoCalGas	Local - Cross Cutting	Behavioral Strategies													RFA Prep			RFA			RFP Prep			RFP			Contract Negotiation																							
SoCalGas	Local - Cross Cutting	Outreach (Tenative, If Necessary)													RFA Prep			RFA			RFP Prep			RFP			Contract Negotiation																							
SoCalGas	Local - Cross Cutting	Marketplace													RFA Prep			RFA			RFP Prep			RFP			Contract Negotiation																							
SoCalGas	Local Public	Public Sector Segments (i.e., LGPs)													RFA Prep			RFA			RFP Prep			RFP			Contract Negotiation																							
SoCalGas	Local - Industrial	Industrial Segment Solutions													RFA Prep			RFA			RFP Prep			RFP			Contract Negotiation																							

ATTACHMENT E

Advice No. 5684-A

PY2021 Program Level Changes

PA justification	Third party implementer or Core	Statewide or Local	Programs to be closed with the disposition of 2021 ABAL	% change	2019 Claimed TRC	2020(Q1) Claimed TRC	2021 Filed TRC	2021 Budget	2020 Budget	Year program started	For existing third party implemented programs, MM/YY Program was due to sunset prior to PY 2021 ABAL planning and new 3P contracting	For existing third party implemented programs, MM/YY Program is extended to as a result of PY 2021 ABAL planning and timing for new 3P contracts' ramp up
To align with D.18-05-041's designation of Plug Load and Appliance (PLA) - Point of Sale (POS) - SCG3703 as a statewide program, SoCalGas will close the program as the new SW program will launch in 2021.	Core	Local	SCG3703: RES-Plug Load and Appliances - POS		0.32	0.10	#N/A	#N/A	\$ 682,625	2013	-	-
This local program will be closed due to the new SW NonRes HVAC program (SCG_SW_HVAC_Up) will be in place.	Core	Local	SCG3712: COM-NonRes HVAC		0.00	0.00	#N/A	#N/A	\$ 679,833	2013	-	-
This program will be closed due to the new SW C&S-SW-Building Codes Advocacy (SCG_SW_CSA_Bldg) program will be in place.	Core	Statewide	SCG3724: C&S-Building Codes & Compliance Advocacy		1.79	0.00	#N/A	#N/A	\$ -	2013	-	-
This program will be closed due to the new SW C&S-SW-Appliance Standards Advocacy (SCG_SW_CSA_Appl) program will be in place.	Core	Statewide	SCG3725: C&S-Appliance Standards Advocacy		4.80	0.00	#N/A	#N/A	\$ -	2013	-	-
In collaboration with Riverside County, SoCalGas will sunset this program at the end of 2020 and merge Riverside County Partnership into Western Riverside Energy Partnership (SCG3783) in PY 2021. SoCalGas remains committed to supporting all Public Sector customers in the region with expanded coverage of Western Riverside Energy Partnership Program (SCG3783).	Core	Local	SCG3744: PUB - Riverside Co Partnership		0.00	0.00	#N/A	#N/A	\$ 135,201	2013	-	-
In collaboration with San Bernardino County, SoCalGas will sunset this program at the end of 2020 and merge San Bernardino County Partnership into San Bernardino Regional Partnership (SCG3802) in PY 2021. SoCalGas remains committed to supporting all Public Sector customers in the region with expanded coverage of San Bernardino regional Partnership Program (SCG3802).	Core	Local	SCG3745: PUB - San Bernardino Co Partnership		0.00	0.00	#N/A	#N/A	\$ 129,470	2013	-	-
As a result of portfolio balancing processes to achieve mandated minimum cost-effectiveness thresholds, SoCalGas and the other partnering IOUs are sunseting the Statewide Energy Efficiency Collaborative (SEEC). Over the last few years the IOUs funded the development of tools, which will remain available to local governments through the respective Non-Governmental Organizations (NGOs). Continued success in the SEEC Program requires transition of program leadership to the NGOs ofICLEI for Local Governments, Institute for Local Governments and the Local Government Commission. As of April 2020, the IOUs and NGOs began collaboratively planning on a stakeholder communication plan, program ramp-down and transition of activities that will provide support to local governments as they increase local capacity of energy efficiency practices.	Core	Local	SCG3751: PUB - SEEC Partnership		0.00	0.00	#N/A	#N/A	\$ 81,425	2013	-	-
SoCalGas will close the program as the new local third-party program (SCG3861) will be in place.	Third party	Local	SCG3762: RES-CLEO		0.34	0.31	#N/A	#N/A	\$ 566,709	2013	August 2020	-
SoCalGas will close the program as the new local third-party program (SCG3844) will be in place.	Third party	Local	SCG3763: RES-MF Direct Therm Savings		0.44	0.00	#N/A	#N/A	\$ 1,959,458	2013	December 2020	-
SoCalGas will close the program as the new SW program (SCG_SW_FS) will launch in 2021.	Third party	Local	SCG3793: COM-IDEAA365-Instant Rebates! Point-of-Sale Foodservice Rebate Program		1.64	1.64	#N/A	#N/A	\$ 2,610,595	2014	December 2020	-
In collaboration with North Orange County Partners, SoCalGas will sunset this program at the end of 2020 and merge North Orange County Cities Partnership into the Orange County Cities Partnership (SCG3750) in PY 2021. SoCalGas remains committed to supporting all Public Sector customers in North Orange County with expanded coverage of Orange County Cities Partnership Program (SCG3750).	Core	Local	SCG3801: PUB - North Orange County Cities Partnership		0.00	0.00	#N/A	#N/A	\$ 159,095	2015	-	-
SoCalGas will close the program as the new local third-party program (SCG3845) will be in place.	Core	Local	SCG3805: COM-Direct Install Program		1.06	2.12	#N/A	#N/A	\$ 3,797,796	2016	-	-
SoCalGas will close the program as the new SW program (SCG_SW_MCWH) will be in place.	Core	Local	SCG3814: COM-Midstream Water Heating		1.98	0.78	#N/A	#N/A	\$ 2,015,678	2019	-	-
SoCalGas will close the program as the new local third-party program (SCG3846) will be in place.	Core	Local	SCG3817: PUB-Direct Install Program		0.85	0.00	#N/A	#N/A	\$ 505,014	2019	-	-
A new program ID is being established for the new SW program which will be in place. As a result, this program placeholder will be closed.	Core	Local	SCG3819: WE&T-SW-Career & Workforce Readiness		0.00	0.00	#N/A	#N/A	\$ -	2019	-	-
SoCalGas will close the program as the new local third-party program (SCG3843) will be in place.	Core	Local	SCG3820: RES-Direct Install Program		0.39	1.85	#N/A	#N/A	\$ 1,257,948	2019	-	-
SoCalGas will close the program as a new local program will be solicited in the first quarter of 2021. SoCalGas' customers (SCG3843) can utilize other Industrial Sector programs in the interim (SCG3713, SCG3714, SCG3715, SCG3716, and SCG3757)	Core	Local	SCG3821: IND-Direct Install Program		0.00	0.00	#N/A	#N/A	\$ 2,809,000	2019	-	-

PA justification	Third party implementer or Core	Statewide or Local	Programs to be closed upon completion of commitments	% change	2020 Claimed TRC	2021 Filed TRC	2021 Budget	2020 Budget	Year program started	For existing third party implemented programs, MM/YY Program was due to sunset prior to PY 2021 ABAL planning and new 3P contracting	For existing third party implemented programs, MM/YY Program is extended to as a result of PY 2021 ABAL planning and timing for new 3P contracts' ramp up
-	-	-	-	N/A	-	-	\$ -	\$ -	-	-	-

PA justification	Third party implementer or Core	Statewide or Local	Programs with reduced budgets (>40% budget decrease), to continue in 2021	% change	2020 Claimed TRC	2021 Filed TRC	2021 Budget	2020 Budget	Year program started	For existing third party implemented programs, MM/YY Program was due to sunset prior to PY 2021 ABAL planning and new 3P contracting	For existing third party implemented programs, MM/YY Program is extended to as a result of PY 2021 ABAL planning and timing for new 3P contracts' ramp up
New SW program to launch in 2021, SoCalGas will allocate decreased budget to fund existing local program during the transition.	Core	Local	SCG3706: RES-Residential HVAC	-50.03%	0.00	2.14	\$ 500,000	\$ 1,000,520	2013	-	-
While a new local program will launch after the completion of the current third-party solicitation, this existing local program will ramp down. The decreased budget reflects this transition while funding remaining projects.	Third party	Local	SCG3765: Res-Manufactured Mobile Home	-76.97%	1.26	1.00	\$ 330,000	\$ 1,433,065	2013	-	July 2021
SoCalGas will decrease this program budget because of the lack of bundled measures available to customers. SoCalGas hopes to increase its suite of bundled direct-install measures in the near future.	Third party	Local	SCG3834: COM-LADWP Direct Install	-42.25%	0.00	1.80	\$ 76,810	\$ 133,000	2019	-	December 2021
New SW Gas and Electric ET programs will launch in 2021, after the completion of the current third-party solicitations. This existing local program will ramp down, and the decreased budget reflects this transition while funding remaining projects.	Core	Local	SCG3721: ET-Technology Development Support	-43.25%	0.00	0.00	\$ 69,357	\$ 122,213	2013	-	-
New SW Gas and Electric ET programs will launch in 2021, after the completion of the current third-party solicitations. This existing local program will ramp down, and the decreased budget reflects this transition while funding remaining projects.	Core	Local	SCG3722: ET-Technology Assessment Support	-46.98%	0.00	0.00	\$ 329,015	\$ 620,536	2013	-	-
New SW Gas and Electric ET programs will launch in 2021, after the completion of the current third-party solicitations. This existing local program will ramp down, and the decreased budget reflects this transition while funding remaining projects.	Core	Local	SCG3722: ET-Technology Introduction Support	-48.22%	0.00	0.00	\$ 387,329	\$ 748,060	2013	-	-
SoCalGas is decreasing the budget and slowly ramping down this program as it has seen little participation.	Core	Local	SCG3809: COM-AB793-CEMTL Program	-99.77%	0.00	0.00	\$ 3,000	\$ 1,279,124	2017	-	-
Based on the recent evaluation, SoCalGas will reduce this budget to focus on programs that have better installation rates such as the LivingWise program (SCG3764).	Core	Local	SCG3831: RES-EE Kits	-67.98%	0.00	1.30	\$ 150,000	\$ 468,397	2019	-	-
This program will continue due to remaining funding commitments to be paid in 2021.	Core	Statewide	SCG3837: PUB-SW-Energy Atlas	N/A	0.00	0.00	\$ -	\$ -	2019	-	-

Southern California Gas Company
Attachment E

PA justification	Third party implementer or Core	Statewide or Local	Programs with enhanced budgets (>40% budget increase)	% change	2020 Claimed TRC	2021 Filed TRC	2021 Budget	2020 Budget	Year program started	For existing third party implemented programs, MM/YY Program was due to sunset prior to PY 2021 ABAL planning and new 3P contracting, or mark "NEW 3P" program if program is result of 3P solicitation process per D1801004	For existing third party implemented programs, MM/YY Program is extended to as a result of PY 2021 ABAL planning and timing for new 3P contracts ramp up, or mark "NEW 3P" program if program is result of 3P solicitation process per D1801004.
In late 2019, a new marketing strategy focusing on management company portfolios, instead of individual property owners, allowed for a steady project pipeline. Some of these projects will see installation completion in 2020. Property managers currently participating through the program are interested in pursuing additional upgrades in 2021 for new property locations. Further, SoCalGas and LADWP are working on expanding their marketing efforts for this program to continue providing joint projects. This effort is expected to bring in new program interest in 2021.	Core	Local	SCG3705: RES-Home Upgrade Program	57.64%	0.20	0.68	\$ 2,193,000	\$ 1,391,126	2013	-	-
Due to the continued effects of the COVID-19 pandemic, SoCalGas will increase LivingWise's budget to expand customer engagement in the residential market to reach students and educate families about energy efficiency in this time of need.	Third party	Local	SCG3764: Res-LivingWise	142.36%	3.09	4.88	\$ 2,503,015	\$ 1,032,756	2013	-	December 2021
SoCalGas is increasing the SEM budget to allocate funding for years 3 and 4 of this program to allow for additional cohorts.	Core	Local	SCG3714: IND-SEM	90.79%	0.00	1.91	\$ 2,032,000	\$ 1,065,046	2013	-	-
In 2021, SoCalGas will consolidate North Orange County Cities Partnership (SCG3801) into Orange County Cities Partnership. This program will expand to cover Public Sector customers throughout Orange County.	Core	Local	SCG3750: PUB- Orange County Cities Partnership	55.87%	0.00	0.00	\$ 256,467	\$ 164,538	2013	-	-
Previous placeholder for program solicitation budget, funding increased due to launch of the new third party program.	Third party	Local	SCG3843: RES-SF Solicitation	58.66%	0.00	0.57	\$ 2,998,599	\$ 1,890,004	2020	NEW 3P	-
Previous placeholder for program solicitation budget, funding increased due to launch of the new third party program.	Third party	Local	SCG3845: COM-SMB Solicitation	46.90%	0.00	1.28	\$ 3,469,704	\$ 2,362,000	2020	NEW 3P	-
There will be a new SW New Construction program launching in 2021. This budget increase is due to the solicitation led by PG&E.	Third party	Statewide	SCG_SW_NC_Res: RES-SW-New Construction	429.20%	0.00	1.24	\$ 442,411	\$ 83,600	2020	NEW 3P	-
SoCalGas is allocating funding to support program administrator activities for the new statewide program starting in 2021.	Core	Statewide	SCG_SW_NC_Res_PA: RES-SW-New Construction-PA	N/A	0.00	0.00	\$ 22,120	\$ -	2020	-	-
SoCalGas is allocating funding to support program administrator activities for the new statewide program starting in 2021.	Core	Statewide	SCG_SW_NC_NonRes_PA: COM-SW-New Construction-PA	N/A	0.00	0.00	\$ 16,720	\$ -	2020	-	-
SoCalGas is allocating funding for administrative activities for the statewide program established in 2020.	Core	Statewide	SCG_SW_CSA_Bldg_PA: C&S-SW-Codes and Standards Advocacy-PA	N/A	0.00	0.00	\$ 1,553	\$ -	2020	-	-
SoCalGas is allocating funding for administrative activities for the statewide program established in 2020.	Core	Statewide	SCG_SW_CSA_Bldg_PA: C&S-SW-Appliance Standards Advocacy-PA	N/A	0.00	0.00	\$ 2,507	\$ -	2020	-	-
SoCalGas is allocating funding for administrative activities for the statewide program established in 2020.	Core	Statewide	SCG_SW_CSA_Bldg_PA: C&S-SW-Federal Codes Advocacy-PA	N/A	0.00	0.00	\$ 1,439	\$ -	2020	-	-

PA justification	Third party implementer or Core	Statewide or Local	Programs that are new in 2021	% change	2020 Claimed TRC	2021 Filed TRC	2021 Budget	2020 Budget	MM/YY program to start	MM/YY Program is due to sunset; and flag as "NEW 3P" program if program is result of 3P solicitation process per D1801004	For existing third party implemented programs, MM/YY Program is extended to as a result of PY 2021 ABAL planning and timing for new 3P contracts ramp up , or mark "NEW 3P" program if program is result of 3P solicitation process per D1801004
Program placeholder being opened in anticipation of the third-party programs that will be forthcoming in 2021.	Third party	Local	SCG3861: RES-Community Lanugage Efficiency Outreach-Direct Install		#N/A	0.53	\$ 1,166,123	#N/A	August 2020	NEW 3P	
Program placeholder being opened in anticipation of the third-party programs that will be forthcoming in 2021.	Third party	Local	SCG3865: AG-Agricultural Solicitation		#N/A	1.21	\$ 3,003,422	#N/A	July 2021	NEW 3P	
Program placeholder being opened in anticipation of the third-party programs that will be forthcoming in 2021.	Third party	Local	SCG3866: COM-Large Commercial Solicitation		#N/A	1.34	\$ 5,229,547	#N/A	July 2021	NEW 3P	
Program placeholder being opened in anticipation of the third-party programs that will be forthcoming in 2021.	Third party	Local	SCG3867: RES-Manufactured Homes Solicitation		#N/A	0.42	\$ 2,502,450	#N/A	July 2021	NEW 3P	
New statewide program to start in 2021	Third party	Statewide	SCG_SW_WET_Work: WE&T Career and Workforce Readiness		#N/A	0.00	\$ 103,023	#N/A	July 2021	NEW 3P	
Program to track PA costs for new statewide program starting in 2021	Core	Statewide	SCG_SW_WET_Work_PA: WE&T Career and Workforce Readiness-PA		#N/A	0.00	\$ 5,151	#N/A	July 2021	-	
New statewide program to start in 2021	Third party	Statewide	SCG_SW_IP_GOV: Institutional Partnerships: DGS & DoC		#N/A	0.00	\$ 34,833	#N/A	August 2021	NEW 3P	
Program to track PA costs for new statewide program starting in 2021	Core	Statewide	SCG_SW_IP_GOV_PA: Institutional Partnerships: DGS & DoC-PA		#N/A	0.00	\$ 1,741	#N/A	August 2021	-	
New statewide program to start in 2021	Third party	Statewide	SCG_SW_WET_CC: WE&T Career Connections		#N/A	0.00	\$ 48,767	#N/A	July 2021	NEW 3P	
Program to track PA costs for new statewide program starting in 2021	Core	Statewide	SCG_SW_WET_CC_PA: WE&T Career Connections-PA		#N/A	0.00	\$ 2,439	#N/A	July 2021	-	
New statewide program to start in 2021	Third party	Statewide	SCG_SW_ETP_GAS: Emerging Technologies, Gas		#N/A	0.00	\$ 731,500	#N/A	August 2021	NEW 3P	
Program to track PA costs for new statewide program starting in 2021	Core	Statewide	SCG_SW_ETP_GAS_PA: Emerging Technologies, Gas-PA		#N/A	0.00	\$ 10,800	#N/A	August 2021	-	
New statewide program to start in 2021	Third party	Statewide	SCG_SW_FS: Food Service POS		#N/A	1.12	\$ 2,945,664	#N/A	April 2021	NEW 3P	
Program to track PA costs for new statewide program starting in 2021	Core	Statewide	SCG_SW_FS_PA: Food Service POS-PA		#N/A	0.00	\$ 216,787	#N/A	April 2021	-	
New statewide program to start in 2021	Third party	Statewide	SCG_SW_MCWH: Midstream Commercial Water Heating		#N/A	1.38	\$ 3,118,565	#N/A	April 2021	NEW 3P	
Program to track PA costs for new statewide program starting in 2021	Core	Statewide	SCG_SW_MCWH_PA: Midstream Commercial Water Heating-PA		#N/A	0.00	\$ 202,845	#N/A	April 2021	-	
New statewide program to start in 2021	Third party	Statewide	SCG_SW_PLA: Plug Load and Appliance		#N/A	0.98	\$ 606,100	#N/A	September 2021	NEW 3P	
Program to track PA costs for new statewide program starting in 2021	Core	Statewide	SCG_SW_PLA_PA: Plug Load and Appliance-PA		#N/A	0.00	\$ 9,901	#N/A	September 2021	-	
New statewide program to start in 2021	Third party	Statewide	SCG_SW_HVAC_Up: Upstream HVAC		#N/A	1.20	\$ 864,586	#N/A	March 2021	NEW 3P	
Program to track PA costs for new statewide program starting in 2021	Core	Statewide	SCG_SW_HVAC_Up_PA: Upstream HVAC-PA		#N/A	0.00	\$ 86,459	#N/A	March 2021	-	