

## PUBLIC UTILITIES COMMISSION

505 VAN NESS AVENUE  
SAN FRANCISCO, CA 94102-3298



Ray B. Ortiz  
Tariff Manager - GT14D6  
555 West Fifth Street  
Los Angeles, CA 90013-1011  
[ROrtiz@socalgas.com](mailto:ROrtiz@socalgas.com)

February 15, 2022

Joseph Mock  
Director, Regulatory Affairs  
555 W. Fifth Street, GT14D6  
Los Angeles, CA 90013-1011  
[JMock@SoCalGas.com](mailto:JMock@SoCalGas.com)

Mr. Ortiz and Mr. Mock:

Energy Division approves Southern California Gas Company's (SoCalGas) Program Year (PY) 2022-2023 Annual Budget Advice Letter #5898-G and #5898-G-A, as filed on November 8, 2021, and supplemented on January 7, 2022<sup>1</sup>, respectively, including budget spending and recovery amounts as reflected in Table 1 below.

Table 1. SoCalGas PY2022-2023 Budget Recovery Request

<b>SoCalGas Recovery Breakdown</b>	<b>2022</b>	<b>2023</b>
Spending Budget Request	\$124,851,185	\$132,703,182
REN/CCA Funding	\$8,776,379	\$9,071,330
AB841 Collection	\$0	\$0
Total Recovery Request	\$133,627,564	\$141,774,511

Advice Letter #5898-G and #5898-G-A are effective December 8, 2021.

If you have any questions, please contact Peter Franzese ([peter.franzese@cpuc.ca.gov](mailto:peter.franzese@cpuc.ca.gov)) and Sasha Merigan ([alexander.merigan@cpuc.ca.gov](mailto:alexander.merigan@cpuc.ca.gov)).

Sincerely,

Simon Baker  
Interim Deputy Executive Director for Energy & Climate Policy, CPUC /  
Interim Director, Energy Division

<sup>1</sup> SoCalGas filed AL 5898-G-A at the request of Energy Division in order to update certain assumptions related to fuel substitution measures in the CPUC's Cost-Effectiveness Tool.



**Joseph Mock**  
Director  
Regulatory Affairs

555 W. Fifth Street, GT14D6  
Los Angeles, CA 90013-1011  
Tel: 213.244.3718  
Fax: 213.244.4957  
[JMock@socalgas.com](mailto:JMock@socalgas.com)

January 7, 2022

Advice No. 5898-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 Budgets for Program Years 2022 and 2023**

Southern California Gas Company (SoCalGas) hereby submits for approval by the California Public Utilities Commission (Commission or CPUC) its Energy Efficiency (EE) Program Portfolio budgets for 2022 and 2023. The EE Program Portfolios, along with supporting documentation, is incorporated as Attachment A, which have been uploaded to the California Energy Data and Reporting System (CEDARS) website.<sup>1</sup>

### **Purpose**

This supplemental advice letter replaces Advice No. 5898 in its entirety to account for updates to funds collected for the Inland Regional Energy Network (I-REN) and minor updates to cost-effectiveness calculations due to a correction in the Cost Effectiveness Tool (CET). This advice letter is submitted in compliance with Ordering Paragraph (OP) 13 of Decision (D.) 21-05-031,<sup>2</sup> which directs program administrators to submit a Tier 2 advice letter following the requirements for the Annual Budget Advice Letters outlined in D.18-05-041, but for both program years 2022 and 2023; D.21-09-037, which directs program administrators to submit their advice letters by November 1, 2021;<sup>3</sup> and D.21-11-013, which directs SoCalGas and Southern California Edison Company (SCE) to update their program advice letter filings for 2022 and 2023 and subsequent energy efficiency program budget filings to reflect the I-REN budgets.<sup>4</sup>

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<sup>1</sup> <https://cedars.sound-data.com>.

<sup>2</sup> D.21-05-031, at p. 84.

<sup>3</sup> D.21-09-037, at p. 21.

<sup>4</sup> D.21-11-013, OP 2.

SoCalGas is steadfast in its commitment to EE as the cornerstone of California's clean energy policy. Among other landmark legislation, California's Senate Bill (SB) 350<sup>5</sup> mandates the doubling of both electric and gas EE by 2030 and SB 100<sup>6</sup> requires that 100% electric sales and procurement are provided by zero-carbon resources by 2045. On March 31, 2021, SoCalGas released its ASPIRE 2045 sustainability strategy and climate commitment to achieve net zero greenhouse gas emissions in its operations and delivery of energy by 2045.<sup>7</sup> This includes emissions from all customers. On October 26, 2021, SoCalGas released its Clean Fuels technical analysis, which showcases the essential role SoCalGas will need to play in California's energy transition.<sup>8</sup> This advice letter submittal continues to advance EE that will result in significant emission reductions, a more reliable gas system, and bill savings for customers.

Recognizing the important objectives beyond energy savings, the Commission recently "reduce[d] the conflict between cost-effectiveness and other equally or more important policy objectives such as equity and support for the energy efficiency market,"<sup>9</sup> allowing for Program Administrators' (PAs) to vigorously pursue resource acquisition savings without compromising support for equally important market support and equity focused activities.

SoCalGas is in full support of these goals and considerations. SoCalGas' proposal includes increases in budgets for successful innovative third-party programs aimed at resource acquisition. For example, SoCalGas is onboarding solar thermal water heating as an EE measure to harness the sustainable power of the sun to reduce natural gas consumption. SoCalGas is also increasing the number and strength of partnerships with municipalities and other organizations to efficiently provide greater market support, as well as greater support for equity programs that target hard-to-reach and disadvantaged communities through direct install and other delivery channels.

## **Background**

On October 24, 2014, the Commission issued D.14-10-046, which authorized funding for EE programs until 2025.<sup>10</sup> On October 28, 2015, the Commission issued D.15-10-028, which approved the EE rolling portfolio mechanics for 2016 and beyond and

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<sup>5</sup> SB 350 Clean Energy and Pollution Reduction Act of 2015, *available at* [https://leginfo.ca.gov/faces/billNavClient.xhtml?bill\\_id=201520160SB350](https://leginfo.ca.gov/faces/billNavClient.xhtml?bill_id=201520160SB350).

<sup>6</sup> SB 100 California Renewables Portfolio Standard Program: emissions of greenhouse gases, *available at* [https://leginfo.ca.gov/faces/billTextClient.xhtml?bill\\_id=201720180SB100](https://leginfo.ca.gov/faces/billTextClient.xhtml?bill_id=201720180SB100).

<sup>7</sup> [https://www.socalgas.com/sites/default/files/2021-03/SoCalGas\\_Climate\\_Commitment.pdf](https://www.socalgas.com/sites/default/files/2021-03/SoCalGas_Climate_Commitment.pdf).

<sup>8</sup> The Role of Clean Fuels and Gas Infrastructure in Achieving California's Net Zero Climate Goal (October 2021), *available at* [https://www.socalgas.com/sites/default/files/2021-10/Roles\\_Clean\\_Fuels\\_Full\\_Report.pdf](https://www.socalgas.com/sites/default/files/2021-10/Roles_Clean_Fuels_Full_Report.pdf).

<sup>9</sup> D.21-05-031, at pp. 13-14.

<sup>10</sup> D.14-10-046, at p. 167.

explains the Annual Budget Advice Letter (ABAL) submittals will propose detailed budgets for cost recovery, transfer, and contracting purposes.<sup>11</sup>

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 begin submitting the ABALs on September 4, 2018 and provide the following information in the ABAL submittals:<sup>12</sup>

- 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 PAs' annual budget in the approved business plans, or (if applicable) the revised annual budget in this ABAL, unless granted by the Commission provided the overall funding level does not exceed the total cap approved by D.18-05-041;
- 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 which required that the TRC test be considered as the primary test for all Commission activities, including submittals for distributed energy resources, and that the results of the Program Administrator Cost (PAC) Test and the Ratepayer Impact Measure (RIM) Test must also be considered.

On July 3, 2020, an Amended Scoping Ruling required several additional factors to be taken into consideration for the submittal of the 2022 ABAL. Specific direction was given regarding the following:

“Program Administrators shall make their best efforts to meet the requirements of Decision 18-05-041 in the filing of their annual budget advice letters on September 1, 2020 and September 1, 2021 for the 2021 and 2022 program years. Commission staff shall take current events into consideration including the COVID-19 pandemic, in reviewing and setting budgets for program years 2021 and 2022, while new energy efficiency portfolio filings of the program administrators are being reviewed.”<sup>13</sup>

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<sup>11</sup> D.15-10-028, at p. 56.

<sup>12</sup> D.18-05-041, at pp. 124-129 and OP 44.

<sup>13</sup> *Assigned Commissioner and Administrative Law Judges' Amended Scoping Ruling Addressing Impacts of Covid-19* (July 3, 2020) (Amended Scoping Ruling), OP 5.

As further noted in the Amended Scoping Ruling:

“...the pandemic has led to an unprecedented reduction in the ability of energy efficiency implementers and contractors to deliver certain types of energy savings projects in the homes and businesses of California electricity and natural gas consumers. In addition, the pandemic and resulting economic impact has resulted in a decline in customer demand for many of the program administrators’ equipment rebate programs, causing uncertainty for the administrators and their Third-Party implementers about energy savings forecasts.”<sup>14</sup>

Assembly Bill (AB) 841 (Stats. 2020, Chap. 372), signed into law on September 30, 2020, establishes the School Energy Efficiency Stimulus Program (SEESP) to be administered by the California Energy Commission (CEC).<sup>15</sup> D.21-01-004 provided authorization and directions to the large IOUs for accounting, seeking recovery, and reporting of funds for SEESP. The budget requirement for program years (PYs) 2021, 2022, and 2023 is included in this 2022-2023 EE budget request.

On May 26, 2021, the Commission issued D.21-05-031, which requires PAs to submit a budget advice letter covering PYs 2022 and 2023 for the two-year time period before new EE business plans and program portfolio filings are submitted for 2024 and beyond. D.21-05-031 also requires that the PAs include the following in the budget advice letter:

- Segment EE program portfolios into programs whose primary purposes are resource acquisition, market support, or equity – ensuring that the market support and equity programs be limited to no more than 30% of the total budget;
- Forecast a TRC ratio for the resource acquisition segment of the portfolio of 1.0 or greater, excluding Codes and Standards (C&S);
- Include a Total System Benefit metric as information-only.<sup>16</sup>

On September 23, 2021, the Commission issued D.21-09-037, which established EE savings goals for 2022-2032.

On November 22, 2021, the Commission issued D.21-11-013 which approved the EE business plan of the I-REN for PYs 2022 through 2025 and added a budget for the years 2026 and 2027. D.21-11-013 assigned SoCalGas as fiscal contracting agent for I-REN<sup>17</sup> and instructed SoCalGas and SCE to coordinate and account for I-REN’s funding in their 2022 and 2023 budget advice letter filings and/or supplements.<sup>18</sup>

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<sup>14</sup> *Id.*, at p. 3

<sup>15</sup> Public Utilities Code Sections 1600, *et. seq.*

<sup>16</sup> D.21-05-031, OP 1.

<sup>17</sup> D.21-11-013, OP 3.

<sup>18</sup> D.21-11-013, OP 2; D.21-11-013, Conclusions of Law 11 and 12.

On December 8, 2021, Commission staff notified PAs that the CPUC's CET required updates associated with values for fuel substitution measures. Commission staff indicated that PAs with fuel substitution measures in their portfolios would need to rerun their portfolio cost-effectiveness calculations and resubmit their ABAL's to reflect the corrected calculations.

At the direction of the Energy Division, Attachment A has been uploaded to the CEDARS website and 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.

### **SoCalGas' 2022 and 2023 Budget and Savings**

SoCalGas' 2022 and 2023 PY portfolio budgets are \$124,783,244, and \$132,634,745, respectively, without RENs. The annual budgets requested herein exceed the individual annual funding amounts included in D.18-05-041.<sup>19</sup> OP 50 of D.18-05-041 grants Commission staff discretion to approve portfolio budget requests in excess of corresponding annual funding amounts included in PA business plans, provided the overall funding level does not exceed the total cap approved by D.18-05-041. The overall funding requested from 2018 through 2023 (\$668.4M) is below the total cap (\$857.7M) approved by D.18-05-041.

The 2022 and 2023 funding request does not include the program budget for the SoCalGas Statewide Marketing, Education & Outreach (ME&O) program, nor the 2022-2023 program budget for the Statewide Financing Pilots.<sup>20</sup> The Southern California Regional Energy Network (SoCalREN) and Tri-County Regional Energy Network (3C-REN) submitted their own advice letters to implement programs and associated budgets for PYs 2022 and 2023, while I-REN's budget for PYs 2022 and 2023 was approved by D.21-11-013. SoCalGas' 2022 and 2023 PY portfolio budgets including SoCalREN, 3C-REN and I-REN are \$133,627,564, and \$141,774,511. Tables 1A and 1B list SoCalGas' 2022 and 2023 budgets and the forecasted energy savings by sector and segment. More details are presented in Attachment A, Table 7. SoCalGas observed two program line items with incorrect segment categorizations in Attachment A, Table 4 in its original advice letter submittal. The errors have been corrected in the supplemental Attachment A, Table 4 and summary values updated in Tables 1A and 1B herein. The total PA budget remains the same and the correction has no material impact to caps and targets.

SoCalGas' allocation of the evaluation, measurement & verification (EM&V) budget is in conformance with the direction provided in D.16-08-019,<sup>21</sup> 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.

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<sup>19</sup> Final annual budgets were approved in SoCalGas' 2019 Supplemental ABAL (Advice No. 5349-A) Table 2 Annual Rolling Portfolio Budget Forecast – True-Up.

<sup>20</sup> Budgets for these programs were approved in D.19-01-005 and D.17-03-026, respectively.

<sup>21</sup> D.16-08-019, at pp. 79-81.

Table 1A-I: SoCalGas 2022 Budget

Sector	Program Segment			Total
	Resource Acquisition	Market Support	Equity	
Residential	\$29,677,596	\$3,780,077	\$15,041,462	\$48,499,135
Commercial	\$29,514,570	\$489,345	\$420,000	\$30,423,915
Industrial	\$15,522,099	\$371,404	\$0	\$15,893,503
Agricultural	\$5,256,072	\$288,895	\$0	\$5,544,967
Public	\$8,025,909	\$3,275,606	\$0	\$11,301,515
Cross Cutting				
Emerging Tech	\$0	\$1,169,307	\$0	\$1,169,307
WE&T	\$0	\$4,856,100	\$161,306	\$5,017,406
Finance	\$0	\$650,000	\$0	\$650,000
OBF Loan Pool	\$0	\$0	\$0	\$0
Codes & Standards				\$1,105,758
<b>Program Subtotal</b>	<b>\$87,996,247</b>	<b>\$14,880,733</b>	<b>\$15,622,768</b>	<b>\$119,605,506</b>
EM&V				\$5,245,679
<b>Portfolio Budget Request</b>				<b>\$124,851,185</b>
RENs				\$8,776,379
<b>Portfolio Budget Request with RENs</b>				<b>\$133,627,564</b>

Table 1A-II: SoCalGas 2022 Savings

Sector	Program Segment			Total (thm)
	Resource Acquisition (thm)	Market Support (thm)	Equity (thm)	
Residential	13,818,144	988	720,928	14,540,060
Commercial	4,193,778	924	-	4,194,702
Industrial	4,330,847	2,182	-	4,333,029
Agricultural	828,845	42	-	828,887
Public	2,229,222	160	-	2,229,382
Cross Cutting				
Emerging Tech	-	-	-	-
WE&T	-	-	-	-
Finance	-	-	-	-
OBF Loan Pool	-	-	-	-
<b>Program Therm Savings</b>	<b>25,400,836</b>	<b>4,297</b>	<b>720,928</b>	<b>26,126,061</b>
Codes & Standards <sup>1</sup>				17,598,838
Total System Benefit (\$) for information only	\$148,739,535	\$380,794	\$10,248,196	\$159,368,525

1. Pursuant to D.18-05-041 SoCalGas no longer engages in federal or statewide codes and standards advocacy as part of its EE portfolio, other than to transfer funds to Pacific Gas and Electric Company as the statewide lead

**Table 1B-I: SoCalGas 2023 Budget**

Sector	Program Segment			Total
	Resource Acquisition	Market Support	Equity	
Residential	\$29,593,709	\$4,643,164	\$15,814,465	\$50,051,338
Commercial	\$29,975,470	\$1,037,445	\$420,000	\$31,432,915
Industrial	\$17,634,787	\$925,718	\$0	\$18,560,505
Agricultural	\$5,616,473	\$681,533	\$0	\$6,298,006
Public	\$8,190,350	\$3,575,523	\$0	\$11,765,873
Cross Cutting				
Emerging Tech	\$0	\$2,134,959	\$0	\$2,134,959
WE&T	\$0	\$4,959,100	\$175,612	\$5,134,712
Finance	\$0	\$650,000	\$0	\$650,000
OBF Loan Pool	\$0	\$0	\$0	\$0
Codes & Standards				\$1,106,658
<b>Program Subtotal</b>	<b>\$91,010,789</b>	<b>\$18,607,442</b>	<b>\$16,410,077</b>	<b>\$127,134,966</b>
EM&V				\$5,568,216
<b>Portfolio Budget Request</b>				<b>\$132,703,182</b>
RENs				\$9,071,330
<b>Portfolio Budget Request with RENs</b>				<b>\$141,774,511</b>

**Table 1B-II: SoCalGas 2023 Savings**

Sector	Program Segment			Total (thm)
	Resource Acquisition (thm)	Market Support (thm)	Equity (thm)	
Residential	14,036,252	13,335	749,941	14,799,528
Commercial	4,547,389	12,188	-	4,559,577
Industrial	4,421,970	28,781	-	4,450,751
Agricultural	788,339	557	-	788,896
Public	2,085,078	2,108	-	2,087,185
Cross Cutting				
Emerging Tech	-	-	-	-
WE&T	-	-	-	-
Finance	-	-	-	-
OBF Loan Pool	-	-	-	-
<b>Program Therm Savings</b>	<b>25,879,028</b>	<b>56,969</b>	<b>749,941</b>	<b>26,685,938</b>
Codes & Standards				20,865,618
<b>Total System Benefit (\$) for information only</b>	<b>\$160,520,337</b>	<b>\$2,973,490</b>	<b>\$11,319,679</b>	<b>\$174,813,505</b>

1. Pursuant to D.18-05-041 SoCalGas no longer engages in federal or statewide codes and standards advocacy as part of its EE portfolio, other than to transfer funds to Pacific Gas and Electric Company as the statewide lead



### **SoCalGas Resource Acquisition and Portfolio Cost-Effectiveness**

D.21-05-031 requires the PAs show cost-effectiveness ratios for all segments and the portfolio (with and without C&S) and that Resource Acquisition Segment meet a cost-effectiveness threshold of a TRC ratio of 1.0 (excluding C&S). SoCalGas has calculated its segment and 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 cost-effectiveness results may change as the Commission releases measure dispositions and other key inputs which could reduce or increase portfolio savings and cost-effectiveness. SoCalGas will continue to evaluate its portfolio as cost-effectiveness inputs change.

**Table 2A: 2022 EE Cost-Effectiveness Ratios**

		Cost Effectiveness Ratio		
		TRC	PAC	RIM
Segment	<b>Resource Acquisition</b>	<b>1.26</b>	1.74	1.64
	Market Support	0.03	0.03	0.03
	Equity	0.56	0.68	0.68
	Codes & Standards (C&S)	2.53	219.20	219.20
Portfolio	<i>including</i> C&S	1.56	3.14	3.02
	<i>excluding</i> C&S	0.98	1.26	1.21

**Table 2B: 2023 EE Cost-Effectiveness Ratios**

		Cost Effectiveness Ratio		
		TRC	PAC	RIM
Segment	<b>Resource Acquisition</b>	<b>1.26</b>	1.81	1.69
	Market Support	0.15	0.16	0.15
	Equity	0.59	0.72	0.72
	Codes & Standards (C&S)	1.64	236.38	236.38
Portfolio	<i>including</i> C&S	1.30	3.24	3.06
	<i>excluding</i> C&S	0.99	1.31	1.24

The SoCalGas ex-ante cost-effectiveness results reflect the inclusion of the following:

- Use of the 2021 CET avoided cost version (2020 avoided cost calculator vintage / E-5077) per D.21-05-031.

- Excludes the 5% market effects adjustment from PA forecasts, as required in D.19-08-034.<sup>22</sup>
- Uses approved workpaper values based on the July 27, 2021, guidance provided by Energy Division.
- General Rate Case loaders associated with the EE program labor, as directed by D.12-11-015, OP 39.
- Cost-effectiveness calculations have been updated due to a correction in the CET.

### **SoCalGas Historical Cost Effectiveness Information**

D.18-05-041 required that PAs report claimed and evaluated TRC and PAC of each program and of each sector for the two most recent years for which data is available.<sup>23</sup> Claimed TRC and PAC for 2019 and 2020 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).<sup>24</sup> SoCalGas provides this information in Tables 3 below.

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

<b>SoCalGas EE Portfolio (without C&amp;S)</b>						
<b>Program Year</b>	<b>Portfolio-level Cost-Effectiveness<sup>1</sup></b>					
	<b>Forecast TRC<sup>2,3</sup></b>	<b>Reported TRC</b>	<b>Evaluated TRC<sup>4</sup></b>	<b>Forecast PAC<sup>2,3</sup></b>	<b>Reported PAC</b>	<b>Evaluated PAC<sup>4</sup></b>
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	0.88	N/A	1.53	1.05	N/A
2021	1.09	-	N/A	1.43	-	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.

<sup>22</sup> D.19-08-034, at p. 27.

<sup>23</sup> D.18-05-041, at p. 124.

<sup>24</sup> *Id.* at p. 125.

<b>SoCalGas EE Portfolio (with C&amp;S)</b>						
<b>Program Year</b>	<b>Portfolio-level Cost-Effectiveness<sup>5</sup></b>					
	Forecast TRC <sup>6,7</sup>	Reported TRC	Evaluated TRC <sup>8</sup>	Forecast PAC <sup>6,7</sup>	Reported PAC	Evaluated PAC <sup>8</sup>
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	1.52	N/A	3.16	3.46	N/A
2021	1.60	-	N/A	3.49	-	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.

SoCalGas will continue to focus on cost-effectiveness for the whole portfolio with an emphasis on the resource acquisition segment in an effort to exceed a TRC ratio of 1.0 on a forecast and evaluated basis. Key strategies are listed below:

- Increasing the comprehensiveness of current programs offerings and/or delivery to minimize lost EE opportunities and reduced program cost.
- Eliminating or scaling down non-cost-effective programs and approaches based on program level metrics and key performance indicators.
- Continuous improvement of processes and program delivery strategies with implementers as well as onboarding new cost-effective third-party programs.
- Adding new measures and technologies as they become available.
- Leveraging expanded financing offerings to drive the conversion of EE project opportunities.

### **SoCalGas PYs 2022 and 2023 Portfolio and Program Changes**

SoCalGas provides the following discussion regarding significant program changes (*i.e.*, more than 40 percent change in funding) that are necessary to meet expected energy savings and other metrics and achieve a forecasted TRC of 1.00 for Resource Acquisition Segment, shown in Tables 4A and 4B.

**Table 4A: SoCalGas Program Changes for PY 2022**

<b>Program Number</b>	<b>Program Name</b>	<b>Program Change Description</b>
SCG_SW_NC_Res_mixed	RES-SW-New Construction	Delayed program solicitation process and program launch led to decrease program budget in 2022.
SCG3813	COM-Savings By Design	Program will be utilized solely to complete existing commitments. No new projects will be accepted due to launch of new SW nonresidential new construction program.
SCG_SW_NC_NonRes_mixed	SW-NonRes New Construction Mixed Fuel	Delayed program solicitation process and program launch led to decrease program budget in 2022.
SCG3739	PUB-California Community College Partnership	Partnership will close once the new SW Higher Education institutional partnership launches in 2022.
SCG3740	PUB-UC/CSU/IOU Partnership	Partnership will close once the new SW Higher Education institutional partnership launches in 2022.
SCG_SW_CS_A_Appl	C&S-SW-Appliance Standards Advocacy	An increased share of the SW C&S budget will be allocated to Federal Codes Advocacy and away from Appliance Standards Advocacy.
SCG3702	RES-Residential Energy Efficiency Program	Program budget increase due to continued success of downstream rebates, evolving marketing partnership with retailers, and anticipated increase in participation. Additionally, program will offer Solar Hot Water rebates in the residential sector and other new rebates in 2022 and 2023 in addition to existing measures.
SCG3705	RES-Home Upgrade Program	Program has continued to see a steady increase in participation since 2021. The program has Multifamily property owners and managers expecting to onboard and complete a significant number of projects in 2022. Additionally, the requested budget would fund expected participation through partnership with Project Homekey and for multi-family properties that do not qualify for the Energy Savings Assistance program.

Program Number	Program Name	Program Change Description
SCG3861	RES-Community Language Efficiency Outreach-Direct Install	Program is increasing its budget to cover more territory in the disadvantage and hard-to-reach areas. Also, additional measures will be installed to increase its penetration with the various communities including increasing direct installations of water heaters to hard-to-reach customers and disadvantaged communities in 2022 and 2023.
SCG_SW_NC_Res_mixed_PA	RES-SW-New Construction-PA	Portfolio Administrator costs for SW program to increase as SW program implementation ramps up into 2022.
SCG_SW_PL A	RES-SW-Plug Load and Appliance	SW program budget increases as implementation of SW program ramps up into 2022.
SCG_SW_PL A_PA	RES-SW-Plug Load and Appliance-PA	Portfolio Administrator costs for SW program to increase as SW program implementation ramps up into 2022.
SCG_SW_FS_PA	COM-SW-Point of Sale Food Service-PA	Portfolio Administrator costs for SW program to increase as SW program implementation ramps up into 2022.
SCG_SW_MC WH_PA	COM-SW-Midstream Commercial Water Heating-PA	Portfolio Administrator costs for SW program to increase as SW program implementation ramps up into 2022.
SCG3774	PUB-REN Fiscal Management & Coordination	Budget increase due to introduction and fiscal management of existing and new Regional Energy Networks.
SCG_SW_IP_Gov	PUB-SW-Institutional Partnership: DGS & DoC	SW program budget increases as implementation of SW program ramps up into 2022.
SCG_SW_IP_Gov_PA	PUB-SW-Institutional Partnerships: DGS & DoC-PA	Portfolio Administrator costs for SW program to increase as SW program implementation ramps up into 2022.
SCG_SW_ET P_Gas_PA	ET-SW-Emerging Technologies, Gas-PA	Portfolio Administrator costs for SW program to increase as SW program implementation ramps up into 2022.

<b>Program Number</b>	<b>Program Name</b>	<b>Program Change Description</b>
SCG_SW_CS A_Natl	C&S-SW-Federal Codes Advocacy	An increased share of the SW C&S budget will be allocated to Federal Codes Advocacy and away from Appliance Standards Advocacy.
SCG3760	WE&T-HERS Rater Training Advancement	Program will offer more workforce, education, and training classes with increased budget. Allow for more attendees and bring back classes that were cut before.
SCG_SW_WE T_Work	WE&T-SW-WE&T Career and Workforce Readiness	SW program budget increases as implementation of SW program ramps up into 2022.
SCG_SW_WE T_Work_PA	WE&T-SW-WE&T Career and Workforce Readiness-PA	Portfolio Administrator costs for SW program to increase as SW program implementation ramps up into 2022.
SCG_SW_WE T_CC	WE&T-SW-WE&T Career Connections	SW program budget increases as implementation of SW program ramps up into 2022.
SCG_SW_WE T_CC_PA	WE&T-SW-WE&T Career Connections-PA	Portfolio Administrator costs for SW program to increase as SW program implementation ramps up into 2022.

**Table 4B: SoCalGas Program Changes for PY 2023**

<b>Program Number</b>	<b>Program Name</b>	<b>Program Change Description</b>
SCG3714	IND-SEM	New local industrial third-party programs will launch and this existing program will ramp down. The decreased budget reflects this transition while funding remaining projects.
SCG3889	RES-Multi-Family Energy Alliance	Budget increase as a result of program implementation ramp up into 2023 for custom measures and increased participation.
SCG_SW_NC _NonRes_ mixed	SW-NonRes New Construction Mixed Fuel	SW program budget increases as implementation of SW program ramps up into 2023.

<b>Program Number</b>	<b>Program Name</b>	<b>Program Change Description</b>
SCG_SW_IP_Gov	PUB-SW-Institutional Partnership: DGS & DoC	SW program budget increases as implementation of SW program ramps up into 2023.
SCG_SW_IP_Colleges	PUB-SW-Institutional Partnership: UC/CSU/CCC	SW program budget increases as implementation of SW program ramps up into 2023.
SCG_SW_WP	PUB-SW-Water/Wastewater Pumping	SW program budget increases as implementation of SW program ramps up into 2023.
SCG3900	IND-Solicitation	Budget increase as a result of program implementation ramp up into 2023. Contracts through solicitation process are expected to be signed middle of 2022.
SCG_SW_ETP_Gas	ET-SW-Emerging Technologies, Gas	SW program budget increases as implementation of SW program ramps up into 2023.
SCG3771	SOL-IDEEA365	Budget increase due to re-introduce of Innovative Designs for Energy Efficiency Activities (IDEEA365) for on-going, rolling solicitations for innovative concepts, ideas and technologies. Competitive solicitations are set to launch in 2022 for implementation of ideas in 2023.

### **SoCalGas PYs 2022 and 2023 Program Closures**

As part of SoCalGas' portfolio, SoCalGas plans to close the following programs in 2022 and 2023, shown in Tables 5A and 5B.

**Table 5A: SoCalGas Program Closures for PY 2022**

<b>Program Number</b>	<b>Program Name</b>	<b>Program Change Description</b>
SCG3706	RES-Residential HVAC Upstream	This program will be closed due to the new SW Upstream HVAC program in place.

<b>Program Number</b>	<b>Program Name</b>	<b>Program Change Description</b>
SCG3836	RES-LADWP HVAC	This program will be closed due to the new SW Upstream HVAC program in place as well as end of contract with implementer.
SCG3825	COM-HVAC QI/QM	This program will be closed due to the new SW HVAC QI/QM program launching in 2022.
SCG3835	COM-Pasadena Direct Install	This program will be closed due to new third-party small/medium commercial programs.
SCG3755	PUB-Public Sector EE Market Support & Innovation	This local government partnership will be closed as part of the strategy to support Public Sector customers through the Regional Energy Pathways program.
SCG3773	PUB-Public Sector Regional Resources	This local government partnership will be closed as part of the strategy to support Public Sector customers through the Regional Energy Pathways program.
SCG3742	PUB-LA Co Partnership	This local government partnership will be closed as part of the strategy to support Public Sector customers through the Regional Energy Pathways program.
SCG3746	PUB-Santa Barbara Co Partnership	This local government partnership will be closed as part of the strategy to support Public Sector customers through the Regional Energy Pathways program.
SCG3747	PUB-South Bay Cities Partnership	This local government partnership will be closed as part of the strategy to support Public Sector customers through the Regional Energy Pathways program.
SCG3748	PUB-San Luis Obispo Co Partnership	This local government partnership will be closed as part of the strategy to support Public Sector customers through the Regional Energy Pathways program.
SCG3749	PUB-San Joaquin Valley Partnership	This local government partnership will be closed as part of the strategy to support Public Sector customers through the Regional Energy Pathways program.



<b>Program Number</b>	<b>Program Name</b>	<b>Program Change Description</b>
SCG3750	PUB-Orange County Cities Partnership	This local government partnership will be closed as part of the strategy to support Public Sector customers through the Regional Energy Pathways program.
SCG3754	PUB-Ventura County Partnership	This local government partnership will be closed as part of the strategy to support Public Sector customers through the Regional Energy Pathways program.
SCG3776	PUB-Gateway Cities Partnership	This local government partnership will be closed as part of the strategy to support Public Sector customers through the Regional Energy Pathways program.
SCG3777	PUB-San Gabriel Valley COG Partnership	This local government partnership will be closed as part of the strategy to support Public Sector customers through the Regional Energy Pathways program.
SCG3779	PUB-West Side Community Energy Partnership	This local government partnership will be closed as part of the strategy to support Public Sector customers through the Regional Energy Pathways program.
SCG3783	PUB-Western Riverside Energy Partnership	This local government partnership will be closed as part of the strategy to support Public Sector customers through the Regional Energy Pathways program.
SCG3802	PUB-San Bernardino Regional Energy Partnership	This local government partnership will be closed as part of the strategy to support Public Sector customers through the Regional Energy Pathways program.
SCG3738	PUB-CA Department of Corrections Partnership	This institutional partnership will be closed due to the new SW State of California partnership in place.
SCG3741	PUB-State of CA/IOU Partnership	This institutional partnership will be closed due to the new SW State of California partnership in place.
SCG3726	C&S-Compliance Enhancement	This program will be closed per CPUC requirement.

<b>Program Number</b>	<b>Program Name</b>	<b>Program Change Description</b>
SCG3727	C&S-Reach Codes	This program will be closed per CPUC requirement.
SCG3728	C&S Planning Coordination	This program will be closed per CPUC requirement.
SCG3730	WE&T-Connections	This program will be closed due to the new SW WE&T Career Connections program in place.
SCG3721	ET-Technology Development Support	This program will be closed due to the new SW Gas Emerging Technology program in place.
SCG3722	ET-Technology Assessment Support	This program will be closed due to the new SW Gas Emerging Technology program in place.
SCG3723	ET-Technology Introduction Support	This program will be closed due to the new SW Gas Emerging Technology program in place.
SCG3765	RES-Manufactured Mobile Homes	This program will be closed due to new third-party manufactured homes program in place.
SCG3843	RES-Single Family Solicitation	This solicitation placeholder will be closed due to new third-party program in place.
SCG3844	RES-Multifamily Solicitation	This solicitation placeholder will be closed due to new third-party program in place.
SCG3867	RES-Mobile Home Solicitation	This solicitation placeholder will be closed due to new third-party program in place.
SCG3845	COM-SMB Solicitation	This solicitation placeholder will be closed due to new third-party program in place.
SCG3866	COM-Large Solicitation	This solicitation placeholder will be closed due to new third-party program in place.
SCG3846	PUB-SM Solicitation	This solicitation placeholder will be closed due to new third-party program in place.
SCG3865	AG-Agricultural Solicitation	This solicitation placeholder will be closed due to new third-party program in place.
SCG3809	COM-AB793-CEMTL Program	This program will be closed once remaining committed funding commitments are complete. Program has seen little participation.

**Table 5B: SoCalGas Program Closures for PY 2023**

<b>Program Number</b>	<b>Program Name</b>	<b>Program Change Description</b>
SCG3823	RES-HVAC QI/QM	This program will be closed in 2022 due to the new SW HVAC QI/QM program launching in 2022.
SCG3739	PUB-California Community College Partnership	This program will be closed in 2022 due to the new SW Higher Education institutional partnership launching in 2022.
SCG3740	PUB-UC/CSU/IOU Partnership	This program will be closed in 2022 due to the new SW Higher Education institutional partnership launching in 2022.
SCG3810	RES-AB793-REMTS Program	This program will be closed once remaining committed funding commitments are complete in 2022. Program has seen little participation.
SCG3757	IND-Small Industrial Facility Upgrades	This program will be closed once remaining committed funding commitments are complete in 2022. Program will be retired for new third-party industrial programs which are currently in the solicitation process.

**Solicitation Placeholder Programs closing in 2022 due to third-party programs launched in 2021:**

- SCG3843 – RES-Single Family Solicitation
- SCG3844 – RES-Multifamily Solicitation
- SCG3867 – RES-Mobile Home Solicitation
- SCG3845 – COM-SMB Solicitation
- SCG3866 – COM-Large Solicitation
- SCG3846 – PUB-SM Solicitation
- SCG3865 – AG-Agricultural Solicitation

**Program IDs being consolidated into single Program ID on CEDARs, program activities are on-going:**

- SCG3708 COM-Energy Advisor, SCG3713 IND-Energy Advisor, SCG3717 AG-Energy Advisor
- SCG3710 COM-Calculated Incentives, SCG3715 IND-Calculated Incentives, SCG3719 AG-Calculated Incentives, SCG3815 PUB-Calculated Incentives
- SCG3711 COM-Deemed Incentives, SCG3716 IND-Deemed Incentives, SCG3720 AG-Deemed Incentives, SCG3816 PUB-Deemed Incentives

**SoCalGas PY 2022 New Programs**

The following programs are new for PY 2022 which include solicitation placeholders in anticipation of the third-party programs that will be forthcoming through SoCalGas' solicitation efforts, statewide program solicitations efforts, and new SoCalGas programs.

- SCG3899 – PUB-Large EE Solicitation
- SCG3912 – PUB-Regional Energy Pathways
- SCG3898 – COM-Behavioral Program
- SCG3900 – IND-Solicitation
- SCG3901 – CC-Outreach Solicitation
- SCG\_SW\_IP\_Colleges – PUB-SW-Institutional Partnership: UC/CSU/CCC
- SCG\_SW\_IP\_Colleges\_PA – PUB-SW-Institutional Partnership: UC/CSU/CCC-PA
- SCG\_SW\_WP – PUB-SW-Water/Wastewater Pumping
- SCG\_SW\_WP\_PA – PUB-SW-Water/Wastewater Pumping-PA

**SoCalGas PY 2023 New Programs**

The following program is a new statewide program anticipated to be launched in PY 2023.

- SCG\_SW\_HVAC\_QIQM – RES-SW-Quality Installation/Quality Management
- SCG\_SW\_HVAC\_QIQM\_PA – RES-SW-Quality Installation/Quality Management-PA

**SoCalGas' 2022 Portfolio Budget Caps and Target**

Pursuant to OP 13 of D.09-09-047, the 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 2022 and 2023 portfolios and included them in Tables 6A and 6B below.

**Table 6A: 2022 EE Portfolio Budget Caps/Targets**

2022 Energy Efficiency Cap And Target Expenditure Projections							
Line	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 <sup>2</sup> (Local SW, CEC & AB 841)	Total Portfolio	Percent of Budget <sup>8</sup>	Cap %	Target %
1	<b>Administrative Costs</b>						
2	PA <sup>1</sup>	\$ 10,452,769		\$ 10,452,769	7.9%	10.0%	
3	Non-PA Third Party & Partnership <sup>2</sup>	\$ -	\$ 3,092,723	\$ 3,092,723	2.3%		10.0%
4	PA & Non-PA Target Exempt Programs <sup>3</sup>	\$ 1,468,434	\$ 156,622	\$ 1,625,056			
5	<b>Marketing and Outreach Costs <sup>4</sup></b>						
6	Marketing & Outreach	\$ 3,535,388	\$ 2,362,360	\$ 5,897,748	4.4%		6.0%
7	Statewide Marketing & Outreach <sup>5</sup>	\$ -		\$ -			
8	<b>Direct Implementation Costs</b>						
9	Direct Implementation (Incentives and Rebates)	\$ 27,509,908	\$ 28,660,706	\$ 56,170,614			
10	Direct Implementation (Non Incentives and Non Rebates)	\$ 15,712,422	\$ 23,196,290	\$ 38,908,712	29.3%		20.0%
11	Direct Implementation Target Exempt Programs (Non Incentives and Non Rebates) <sup>3</sup>	\$ 7,838,386	\$ 3,490,499	\$ 11,328,885			
12	<b>EM&amp;V Costs (PA and Energy Division) <sup>6,7</sup></b>	\$ 5,245,679		\$ 5,245,679	4.1%		4.0%
12a	EM&V - PA	\$ 1,370,480		\$ 1,370,480			
12b	EM&V - ED	\$ 3,875,199		\$ 3,875,199			
13	<b>Total Portfolio Budget, with GRC Loaders (includes PA Program and EM&amp;V Budget + SW CEC AB 841 (per CPUC Code Section 1613 counts as a Third Party Program as defined in D.18-08-019, OP 10)</b>	\$ 71,762,985	\$ 60,959,199	\$ 132,722,185			
14			\$ 382,120	\$ 382,120			
15a	<b>PA Spending Budget Request, with GRC Loaders (PA Program and EM&amp;V + CEC AB 841) <sup>9</sup></b>			\$ 133,104,305			
15b	<b>PA Spending Budget Request, without GRC Loaders (PA Program and EM&amp;V)</b>			\$ 124,851,185			
16	<b>Total Third-Party Implementer Contracts + CEC AB 841, without GRC Loaders (as defined per D.16-08-019, OP 10 and D.21-01-004) <sup>10, 11</sup></b>		\$ 61,341,319		49.0%		60.0%

Notes:

- 10% cap requirement based on D. 09-09-047 is set for IOU only.
- New Third party program definition per D.16-08-019, OP 10. For Row 3 of this table, the "Third Party & Partnership" administrative costs under the "Non-Third Party Qualifying Costs" column are costs for programs that met the old Third Party definition prior to the transition to the new third party definition.
- Target Exempt Programs are Non-Resource Programs which include: Emerging Technologies, Workforce Education & Training, Strategic Energy Resources (SER) program, 3P Placeholder for Public LGPs, and Codes & Standards programs (excluding Building Codes Advocacy, Appliance Standards Advocacy and National Standards Advocacy).
- Statewide Marketing & Outreach (SW ME&O) is excluded from the Marketing and Outreach cost target calculation per D.13-12-038, at p. 82.
- Statewide ME&O budgets for October 2019 through 2021 were requested in Advice Letter 4098-G/5544-E and supplements, and are pending approval. The amount in Line 7 represents the portion allocated to EE.
- For IOUs, EM&V costs only includes IOU's Total EM&V budget (PA + ED) and includes REN EM&V-ED budgets.
- The EM&V percentage is greater than 4% because numerator includes REN's EMV-ED budgets but the denominator excludes REN's total budgets.
- As directed in the Energy Efficiency Policy Manual Version 5 July 2013, page 92, this total includes SWME&O and excludes REN and CCA budgets and is the denominator used to calculate the IOU PA Admin, Marketing, and Direct Implementation Non-Incentives percentages.
- IOU PA's 2022 and 2023 Proposed Budget excludes SWME&O and includes CEC AB 841.
- IOU PA's percentage for Third-Party Implementer Contracts denominator is IOU PA Subtotal including EM&V, but excluding SWME&O, REN, and CCA. This is the Total in line 15 minus SWME&O in line 7.
- IOU's Third-Party Implementer Contracts (as defined per D.16-08-019, OP 10) includes third-party contract and incentive budgets and statewide qualifying contract and incentive budgets.
- Costs in this table include labor loaders not recovered through SCG's DSMBA, and those estimated costs are \$7,871,000 and \$8,023,000 for 2022 and 2023, respectively.

**Table 6B: 2023 EE Portfolio Budget Caps/Targets**

2023 Energy Efficiency Cap And Target Expenditure Projections							
Line	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 <sup>2</sup> (Local SW, CEC & AB 841)	Total Portfolio	Percent of Budget <sup>8</sup>	Cap %	Target %
1	<b>Administrative Costs</b>						
2	PA <sup>1</sup>	\$ 10,294,107		\$ 10,294,107	7.3%	10.0%	
3	Non-PA Third Party & Partnership <sup>2</sup>	\$ -	\$ 4,195,070	\$ 4,195,070	3.0%	10.0%	
4	PA & Non-PA Target Exempt Programs <sup>3</sup>	\$ 1,351,714	\$ 249,652	\$ 1,601,366			
5	<b>Marketing and Outreach Costs <sup>4</sup></b>						
6	Marketing & Outreach	\$ 3,366,987	\$ 2,958,476	\$ 6,325,463	4.5%	6.0%	
7	Statewide Marketing & Outreach <sup>5</sup>	\$ -		\$ -			
8	<b>Direct Implementation Costs</b>						
9	Direct Implementation (Incentives and Rebates)	\$ 19,635,850	\$ 40,389,126	\$ 60,024,976			
10	Direct Implementation (Non Incentives and Non Rebates)	\$ 10,103,116	\$ 30,216,071	\$ 40,319,187	28.7%	20.0%	
11	Direct Implementation Target Exempt Programs (Non Incentives and Non Rebates) <sup>3</sup>	\$ 7,353,864	\$ 5,043,932	\$ 12,397,796			
12	<b>EM&amp;V Costs (PA and Energy Division) <sup>6,7</sup></b>	\$ 5,568,216		\$ 5,568,216	4.1%	4.0%	
12a	EM&V - PA	\$ 1,456,755		\$ 1,456,755			
12b	EM&V - ED	\$ 4,111,461		\$ 4,111,461			
13	<b>Total Portfolio Budget, with GRC Loaders (includes PA Program and EM&amp;V Budget + SW CEC AB 841 (per CPUC Code Section 1613 counts as a Third Party Program as defined in D.18-08-019, OP 10)</b>	\$ 57,673,854	\$ 83,052,327	\$ 140,726,182			
14			\$ -	\$ -			
15a	<b>PA Spending Budget Request, with GRC Loaders (PA Program and EM&amp;V + CEC AB 841) <sup>9</sup></b>			\$ 140,726,182			
15b	<b>PA Spending Budget Request, without GRC Loaders (PA Program and EM&amp;V)</b>			\$ 132,703,182			
16	<b>Total Third-Party Implementer Contracts + CEC AB 841, without GRC Loaders (as defined per D.16-08-019, OP 10 and D.21-01-004) <sup>10, 11</sup></b>		\$ 83,052,327		62.6%	60.0%	

Notes:

- 10% cap requirement based on D. 09-09-047 is set for IOU only.
- New Third party program definition per D.16-08-019, OP 10. For Row 3 of this table, the "Third Party & Partnership" administrative costs under the "Non-Third Party Qualifying Costs" column are costs for programs that met the old Third Party definition prior to the transition to the new third party definition.
- Target Exempt Programs are Non-Resource Programs which include: Emerging Technologies, Workforce Education & Training, Strategic Energy Resources (SER) program, 3P Placeholder for Public LGPs, and Codes & Standards programs (excluding Building Codes Advocacy, Appliance Standards Advocacy and National Standards Advocacy).
- Statewide Marketing & Outreach (SW ME&O) is excluded from the Marketing and Outreach cost target calculation per D.13-12-038, at p. 82.
- Statewide ME&O budgets for October 2019 through 2021 were requested in Advice Letter 4098-G/5544-E and supplements, and are pending approval. The amount in Line 7 represents the portion allocated to EE.
- For IOUs, EM&V costs only includes IOU's Total EM&V budget (PA + ED) and includes REN EM&V-ED budgets.
- The EM&V percentage is greater than 4% because numerator includes REN's EMV-ED budgets but the denominator excludes REN's total budgets.
- As directed in the Energy Efficiency Policy Manual Version 5 July 2013, page 92, this total includes SWME&O and excludes REN and CCA budgets and is the denominator used to calculate the IOU PA Admin, Marketing, and Direct Implementation Non-Incentives percentages.
- IOU PA's 2022 and 2023 Proposed Budget excludes SWME&O and includes CEC AB 841.
- IOU PA's percentage for Third-Party Implementer Contracts denominator is IOU PA Subtotal including EM&V, but excluding SWME&O, REN, and CCA. This is the Total in line 15 minus SWME&O in line 7.
- IOU's Third-Party Implementer Contracts (as defined per D.16-08-019, OP 10) includes third-party contract and incentive budgets and statewide qualifying contract and incentive budgets.
- Costs in this table include labor loaders not recovered through SCG's DSMBA, and those estimated costs are \$7,871,000 and \$8,023,000 for 2022 and 2023, respectively.

SoCalGas notes the following assumptions:

- 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.<sup>25</sup> These programs include EM&V, Marketing and Outreach, Emerging Technologies, C&S, 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.16-08-019, OP 15, 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 CEDARS website.

### **Statewide Programs**

Consistent with Energy Division direction, SoCalGas provides the budget allocation for all statewide programs in Attachment A. Budget allocations are provided for those programs that are being implemented and/ or launched in PY 2022 and PY 2023.

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.<sup>26</sup> Otherwise, forecasted savings are based upon available inputs and information from its third-party implementers, on-going solicitations and historical program and sector knowledge to inform assumptions and forecasted savings. SoCalGas' savings forecasts 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 Pacific Gas and Electric Company Advice 5373-E-A/4009-G-A).

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<sup>25</sup> D.09-09-047, at pp. 50-51.

<sup>26</sup> D.19-08-034, at p. 30.

**California EE AB 841 – SEESP**

SEESP consists of two programs that are to be funded with IOU EE funds, the School Reopening Ventilation and EE Verification and Repair and School Noncompliant Plumbing Fixture and Appliance programs, aimed generally at improving ventilation and replacing old or inefficient plumbing fixtures to safely prepare schools for operating during the COVID-19 pandemic. This program is to be administered solely by the CEC. The funding provided by each IOU is limited to projects that are located in its service territory.<sup>27</sup>

D.21-04-004 directed the IOUs' to allocate unspent and uncommitted funds from PYs 2020 through 2022 toward the SEESP budget. During 2021, SoCalGas made two quarterly payments, totaling \$2,500,000, to the CEC based on an estimated unspent and uncommitted funds of \$5,000,000. On September 27, 2021, the CPUC's Utility Audits, Risk and Compliance Division issued a report updating the 2020 amount to \$1,463,808, thus SoCalGas overpaid the CEC by \$1,036,192. SoCalGas has already begun to coordinate the reconciliation of this overpayment with the CPUC and CEC.

**Metrics**

SoCalGas submitted sector-level metrics in conjunction with its 2020 EE Annual Report. This information has been incorporated as part of the budget advice letter appendix submitted on the CEDARS website and is searchable via the following link: <https://cedars.sound-data.com/documents/standalone/list/>. Pursuant to D.18-05-041, SoCalGas' 2020 sector-level metrics are also available through SoCalGas' website in the following link: [https://www.socalgas.com/sites/default/files/SCG\\_2020\\_Energy\\_Efficiency\\_Annual\\_Report.pdf](https://www.socalgas.com/sites/default/files/SCG_2020_Energy_Efficiency_Annual_Report.pdf).

**Revenue Requirements**

Table 7 below summarizes the revenue requirement impact by class of service. In addition, SoCalGas provides herein as Attachment A, the Gas Bill Payer Impacts table comparing present and proposed rates associated with the inclusion of SoCalGas' proposed 2020 budget in its gas transportation rates.

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<sup>27</sup> D.21-01-004, at pp.16-17



**Table 7A: 2022 Revenue Requirement by Customer Class**

<b>Customer Class</b>	<b>Applicable Rate</b>	<b>Increase/(Decrease)</b>
	<b>Schedules</b>	<b>(\$000s)</b>
Core	GR, GS, GM, GO-AC, G-NGVR, GL, G-10, G-AC, G-EN, G-NGV	\$22,064
Non-Core	GT-F, GT-I, GT-TLS	\$1,827
<b>Total</b>		<b>\$23,891</b>

**Table 7B: 2023 Revenue Requirement by Customer Class**

<b>Customer Class</b>	<b>Applicable Rate</b>	<b>Increase/(Decrease)</b>
	<b>Schedules</b>	<b>(\$000s)</b>
Core	GR, GS, GM, GO-AC, G-NGVR, GL, G-10, G-AC, G-EN, G-NGV	\$7,524
Non-Core	GT-F, GT-I, GT-TLS	\$623
<b>Total</b>		<b>\$8,147</b>

**Protests**

Anyone may protest this advice letter to the Commission. The protest must state the grounds upon which it is based, including such items as financial and service impact, and should be submitted expeditiously. 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 shortened to a period of 5 days. The protest must be made in writing and must be received within 5 days of the date of this advice letter, which is January 12, 2022. The address for mailing or delivering a protest to the Commission is:

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

A copy of the protest should also be sent via e-mail to the Energy Division Tariff Unit ([EDTariffUnit@cpuc.ca.gov](mailto:EDTariffUnit@cpuc.ca.gov)). Due to the COVID-19 pandemic, SoCalGas is currently unable to receive protests or comments to this advice letter via U.S. mail or fax. Please submit protests or comments to this advice letter via e-mail to the addresses shown below on the same date it is mailed or e-mailed to the Commission.

Attn: Grisel Juarez Velazquez  
Sr. Regulatory Tariff Administrator  
555 West Fifth Street, GT14D6  
Los Angeles, CA 90013-1011  
Facsimile No.: (213) 244-4957  
E-mail: [GJuarezVelazquez@socalgas.com](mailto:GJuarezVelazquez@socalgas.com)  
E-mail: [Tariffs@socalgas.com](mailto:Tariffs@socalgas.com)

### **Effective Date**

SoCalGas believes that this advice letter is subject to Energy Division disposition and should be classified as Tier 2 (effective after staff approval) pursuant to GO 96-B. This submittal is consistent with D.18-05-041. SoCalGas respectfully requests that this submittal be approved on December 8, 2021, the effective date requested in Advice No. 5898.

### **Notice**

A copy of this advice letter is being sent to SoCalGas' GO 96-B service list and the Commission's service list 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](mailto: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](mailto:Process_Office@cpuc.ca.gov).

*/s/ Joseph Mock*  
Joseph Mock  
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 proposed<sup>1</sup>:

Pending advice letters that revise the same tariff sheets:

<sup>1</sup>Discuss 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](mailto: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. 5898-A**

**Budget Tables**

Pa Name: Southern California Gas Company

AMENDED

Budget Year: 2022-2023

(This Table applies only to the IOU PAs)

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 Annual Bill Savings by Year (\$)	Total Average Lifecycle Bill Savings (\$)
<b>Present Rates - System Average</b>				
2021	\$ -	\$ 1.5346	\$ 98,871,332	\$ 482,684,291
2022	\$ -	\$ 1.6771	\$ 73,331,123	\$ 724,857,393
2023	\$ -	\$ 1.6785	\$ 79,814,324	\$ 832,847,293

Based on December 2021 current effective rates

Total Average Annual Bill Savings by Year (\$) Electric Average Rate (Res and Non-Res) \$/kwh \* Total First Year Electric Net Savings KWH + Gas Average Rate(Res and Non-Res) \$/therm \* Total First Year Gas Net Savings Therm

Total Average Lifecycle Bill Savings (\$) Electric Average Rate (Res and Non-Res) \$/kwh \* Total Lifecycle Electric Net Savings KWH + Gas Average Rate(Res and Non-Res) \$/therm \* Total Lifecycle Gas Net Savings Therm



Table 3 - Budget and Cost Recovery by Funding Source

PA EE Programs and EM&V	2022	2023
Annual PA Spending Budget Request (Program and EM&V total)	\$ 124,851,185	\$ 132,703,182
<b>CEC AB 841 Program Budget Request</b>		
Applicable percentage of difference between funding limitation and 2020 budget (70% for 2022 and 60% for 2023) <sup>1</sup>	\$ -	\$ -
Plus 2020 and Beyond Uncommitted and Unspent Carryover Balance	\$ 382,120	\$ -
<b>PA Spending Budget Request (PA Program and EM&amp;V + CEC AB 841)</b>	<b>\$ 125,233,305</b>	<b>\$ 132,703,182</b>

<sup>1</sup> Applicable percentage is 70% for 2022 and 60% for 2023.

Portfolio Budget (Before Carryover)	2022 Budget	2022 % Allocation	2023 Budget	2023 % Allocation
Electric Procurement EE Funds	\$ -	0%	\$ -	0%
Gas PPP Surcharge Funds	\$ 125,233,305	100%	\$ 132,703,182	100%
<b>Total Funds</b>	<b>\$ 125,233,305</b>		<b>\$ 132,703,182</b>	

Table 3c - Revenue Requirement for Cost Recovery by Funding Source

Authorized Funding in Rates (including Unspent/Uncommitted Funds )	2022 Revenue Requirement	2022 % Allocation after Carryover adjustment	2023 Revenue Requirement	2023 % Allocation after Carryover adjustment
Electric Procurement EE Funds	\$ -	0%	\$ -	0%
Gas PPP Surcharge Funds	\$ 124,851,185	100%	\$ 132,703,182	100%
<b>Total Funds</b>	<b>\$ 124,851,185</b>		<b>\$ 132,703,182</b>	

Table 3d - Unspent/Uncommitted Carryover Funds (in positive \$ amounts) 1

Program Unspent/Uncommitted Funds	2022			2023		
	Electric	Gas	Total	Electric	Gas	Total
Pre-2020 <sup>3</sup>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
2020 <sup>2</sup>	\$ -	\$ 185,400	\$ 185,400	\$ -	\$ -	\$ -
2021 <sup>2</sup>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
2022 <sup>2</sup>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Total</b>	<b>\$ -</b>	<b>\$ 185,400</b>	<b>\$ 185,400</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>

EM&V Unspent/Uncommitted Funds	2022			2023		
	Electric	Gas	Total	Electric	Gas	Total
Pre-2020	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
2020 <sup>2</sup>	\$ -	\$ 196,720	\$ 196,720	\$ -	\$ -	\$ -
2021 <sup>2</sup>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
2022 <sup>2</sup>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Total</b>	<b>\$ -</b>	<b>\$ 196,720</b>	<b>\$ 196,720</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>

Total Unspent/Uncommitted Funds	2022			2023		
	Electric	Gas	Total	Electric	Gas	Total
Pre-2020 <sup>3</sup>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
2020 <sup>2</sup>	\$ -	\$ 382,120	\$ 382,120	\$ -	\$ -	\$ -
2021 <sup>2</sup>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
2022 <sup>2</sup>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Total</b>	<b>\$ -</b>	<b>\$ 382,120</b>	<b>\$ 382,120</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>

1 Any actual uncommitted/unspent funds for 2023 will be trued-up in the IOU's respective electric and gas PPP annual rates advice letter for 2023.

2 These funds are assigned to CEC AB 841

3 2020 Unspent/Uncommitted for REN is not subject to AB841 (CEC), thus reflected under Pre-2020 amount

Table 3e - Total Requested 2022-2023 IOU Revenue Requirement - Demand Response & Energy Efficiency 1,2

	2022				2023			
	Demand Response	Energy Efficiency			Demand Response	Energy Efficiency		
		Electric Demand Response Funds	Electric Energy Efficiency Funds	Natural Gas Public Purpose Funds		Total Energy Efficiency Funds	Electric Demand Response Funds	Electric Energy Efficiency Funds
Program Funds - PA <sup>4</sup>	\$ -	\$ -	\$ 119,605,506	\$ 119,605,506	\$ -	\$ -	\$ 127,134,966	\$ 127,134,966
Program Funds - CEC <sup>5</sup>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Program Funds - REN <sup>5</sup>	\$ -	\$ -	\$ 8,776,379	\$ 8,776,379	\$ -	\$ -	\$ 9,071,330	\$ 9,071,330
Program Funds - CCA <sup>5</sup>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
EM&V <sup>3</sup>	\$ -	\$ -	\$ 5,245,679	\$ 5,245,679	\$ -	\$ -	\$ 5,568,216	\$ 5,568,216
<b>Budget Total</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 133,627,564</b>	<b>\$ 133,627,564</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 141,774,511</b>	<b>\$ 141,774,511</b>

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, D.18-05-041 and D.21-01-004.

2 REN and CCA information provided by all RENS and CCAs and is consistent with their respective ABALS.

3 This represent total IOU+CCA+REN EM&V

4 Program Funds represents the total program budget, excluding EM&V. Only the electric IOU PAs will complete the Demand Response funding columns.

5 Only the IOU completes this line and should be consistent with table 7. CEC amount is for "Applicable percentage (70%) of difference between funding limitation and 2020 budget".



Table 4 – Budget, Spent, Unspent, Carryover Details

New/Existing Program #	Discontinued Program #	Program Name	Target Exempt	Program Type	Business Sector	Portfolio Segment	Pre-2020 Unspent/Uncommitted EE Funds 5	2021 Authorized Budget	2021 Forecasted Unspent/Uncommitted Funds as of 7/31/2021	2021 Budget Spent as of 07/31/2021	Administrative	Marketing/Outreach	Direct Implementation Non-Incentive	Incentive/Rebate	2022 PA Spending Budget Request	2020 Uncommitted and Unspent Carryover Balance	2022 PA Revenue Requirement
<b>Residential Programs</b>																	
SCG3701		RES-Energy Advisor	Yes	Core PA	Residential	Market Support		\$ 776,000	\$ 300,820	\$ 48,000	\$ 40,000	\$ 688,000	\$ -	\$ 776,000	\$ -	\$ 776,000	\$ 776,000
SCG3702		RES-Residential Energy Efficiency Program	No	Core PA	Residential	Resource Acquisition		\$ 11,655,724	\$ 13,152,429	\$ 611,000	\$ 1,447,000	\$ 1,784,844	\$ 12,868,465	\$ 16,711,309	\$ -	\$ 16,711,309	\$ 16,711,309
SCG3705		RES-Home Upgrade Program	No	Core PA	Residential	Equity		\$ 2,193,000	\$ 761,416	\$ 88,000	\$ 132,000	\$ 973,000	\$ 4,051,993	\$ 5,244,993	\$ -	\$ 5,244,993	\$ 5,244,993
SCG3706	SCG3706	RES-Home Upgrade Program	No	Local Third Party	Residential	Resource Acquisition		\$ 500,000	\$ 448,983	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCG3707		RES-RNC	No	Core PA	Residential	Resource Acquisition		\$ 490,000	\$ 397,294	\$ 80,000	\$ 23,000	\$ 436,000	\$ -	\$ 539,000	\$ -	\$ 539,000	\$ 539,000
SCG3764		RES-LivingWise	No	Local Third Party	Residential	Resource Acquisition		\$ 2,503,015	\$ 146,488	\$ 99,760	\$ 40,471	\$ 451,984	\$ 1,110,200	\$ 1,702,415	\$ -	\$ 1,702,415	\$ 1,702,415
SCG3765	SCG3765	RES-Manufactured Mobile Home	No	Local Third Party	Residential	Equity		\$ 330,000	\$ 2,700	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCG3810		RES-AB793-REMTS Program	No	Local Third Party	Residential	Resource Acquisition		\$ 828,707	\$ 96,191	\$ 34,552	\$ 8,189	\$ 380,725	\$ 405,239	\$ 828,705	\$ -	\$ 828,705	\$ 828,705
SCG3823		RES-HVAC QIOM	No	Core PA	Residential	Market Support		\$ 250,000	\$ 39,359	\$ 10,000	\$ 50,000	\$ 180,000	\$ 20,000	\$ 250,000	\$ -	\$ 250,000	\$ 250,000
SCG3824		RES-Behavioral Program	No	Local Third Party	Residential	Resource Acquisition		\$ 6,721,000	\$ 4,355,124	\$ 180,000	\$ -	\$ 4,760,539	\$ -	\$ 4,940,539	\$ -	\$ 4,940,539	\$ 4,940,539
SCG3829		RES-Marketplace	No	Local Third Party	Residential	Market Support		\$ 1,417,500	\$ 542,584	\$ 21,750	\$ 90,000	\$ 1,445,000	\$ -	\$ 1,556,750	\$ -	\$ 1,556,750	\$ 1,556,750
SCG3891		RES-Retail Partnering	No	Core PA	Residential	Market Support		\$ 760,000	\$ 204,784	\$ 10,000	\$ -	\$ 750,000	\$ -	\$ 760,000	\$ -	\$ 760,000	\$ 760,000
SCG3830		RES-Retail Partnering	No	Local Third Party	Residential	Market Support		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCG3831		RES-EE Kits	No	Core PA	Residential	Resource Acquisition		\$ 150,000	\$ 8,200	\$ 5,000	\$ -	\$ 20,000	\$ 125,000	\$ 150,000	\$ -	\$ 150,000	\$ 150,000
SCG3831		RES-EE Kits	No	Local Third Party	Residential	Resource Acquisition		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCG3832		RES-Pasadena Home Upgrade	No	Local Third Party	Residential	Resource Acquisition		\$ 447,300	\$ 7,838	\$ 23,130	\$ -	\$ 54,170	\$ 420,000	\$ 497,300	\$ -	\$ 497,300	\$ 497,300
SCG3833		RES-Burbank Home Upgrade	No	Local Third Party	Residential	Resource Acquisition		\$ 374,526	\$ 4,954	\$ 23,550	\$ -	\$ 50,925	\$ 390,000	\$ 374,526	\$ -	\$ 374,526	\$ 374,526
SCG3836	SCG3836	RES-LADWP HVAC	No	Local Third Party	Residential	Resource Acquisition		\$ 1,329,300	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCG3843	SCG3843	RES-SF Solicitation	No	Local Third Party	Residential	Resource Acquisition		\$ 2,998,599	\$ 40,214	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCG3844	SCG3844	RES-MF Solicitation	No	Local Third Party	Residential	Resource Acquisition		\$ 2,042,827	\$ 103,142	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCG3861		RES-Community Language Efficiency Outreach-Direct Install	No	Local Third Party	Residential	Equity		\$ 1,166,123	\$ 347,974	\$ 94,305	\$ 63,860	\$ 720,778	\$ 2,437,215	\$ 3,316,158	\$ -	\$ 3,316,158	\$ 3,316,158
SCG3867	SCG3867	RES-MH Solicitation	No	Local Third Party	Residential	Equity		\$ 2,502,450	\$ 1,372	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCG3883		RES-Residential Advanced Clean Energy	No	Local Third Party	Residential	Equity		\$ -	\$ 1,457,419	\$ 165,000	\$ 90,000	\$ 435,000	\$ 2,460,353	\$ 3,150,353	\$ -	\$ 3,150,353	\$ 3,150,353
SCG3884		RES-Comprehensive MH Program (Synergy)	No	Local Third Party	Residential	Equity		\$ -	\$ 662,676	\$ 94,000	\$ 48,000	\$ 246,000	\$ 1,311,958	\$ 1,699,958	\$ -	\$ 1,699,958	\$ 1,699,958
SCG3885		RES-Residential MH Program (Staples Energy)	No	Local Third Party	Residential	Equity		\$ -	\$ 54,771	\$ 84,188	\$ 52,913	\$ 324,639	\$ 538,260	\$ 1,000,000	\$ -	\$ 1,000,000	\$ 1,000,000
SCG3888		RES-Multi-Family Spaces and Water Heating Controls	No	Local Third Party	Residential	Resource Acquisition		\$ -	\$ -	\$ 75,964	\$ 9,964	\$ 112,834	\$ 450,162	\$ 648,338	\$ -	\$ 648,338	\$ 648,338
SCG3889		RES-Multi-Family Energy Alliance	No	Local Third Party	Residential	Resource Acquisition		\$ -	\$ -	\$ 118,731	\$ 68,812	\$ 391,689	\$ 1,454,387	\$ 2,033,619	\$ -	\$ 2,033,619	\$ 2,033,619
SCG SW NC Res_mixed		RES-SW-New Construction	No	SW Third Party	Residential	Market Support		\$ 442,411	\$ (9)	\$ 23,286	\$ 20,394	\$ 57,784	\$ 57,018	\$ 158,492	\$ -	\$ 158,492	\$ 158,492
SCG SW NC Res_mixed PA		RES-SW-New Construction-PA	No	Core PA	Residential	Market Support		\$ 22,120	\$ -	\$ 17,500	\$ -	\$ 25,000	\$ -	\$ 42,500	\$ -	\$ 42,500	\$ 42,500
SCG SW NC NonRes_Res_mixed		RES-SW-NonRes New Construction	No	SW Third Party	Residential	Market Support		\$ -	\$ -	\$ 2,256	\$ 1,868	\$ 6,541	\$ 5,630	\$ 18,334	\$ -	\$ 18,334	\$ 18,334
SCG SW NC NonRes_Res_mixed PA		RES-SW-NonRes New Construction-PA	No	Core PA	Residential	Market Support		\$ -	\$ -	\$ 2,000	\$ -	\$ -	\$ -	\$ 2,000	\$ -	\$ 2,000	\$ 2,000
SCG SW PLA		RES-SW-Plug Load and Appliance	No	SW Third Party	Residential	Resource Acquisition		\$ 806,100	\$ 39,051	\$ 56,773	\$ 164,832	\$ 443,371	\$ 566,870	\$ 1,231,846	\$ -	\$ 1,231,846	\$ 1,231,846
SCG SW PLA PA		RES-SW-Plug Load and Appliance-PA	No	Core PA	Residential	Resource Acquisition		\$ 9,901	\$ -	\$ 20,000	\$ -	\$ -	\$ -	\$ 20,000	\$ -	\$ 20,000	\$ 20,000
SCG SW HVAC QIOM		RES-SW-QIOM	No	SW Third Party	Residential	Market Support		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCG SW HVAC QIOM PA		RES-SW-QIOM-PA	No	Core PA	Residential	Resource Acquisition		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Commercial Programs</b>																	
SCG3708	SCG3708	COM-Energy Advisor	Yes	Core PA	Commercial	Market Support		\$ 307,000	\$ 348,268	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCG3710	SCG3710	COM-Calculated Incentives	No	Core PA	Commercial	Resource Acquisition		\$ 3,052,000	\$ 828,061	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCG3711	SCG3711	COM-Deemed Incentives	No	Core PA	Commercial	Resource Acquisition		\$ 4,612,840	\$ 4,033,565	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCG3809	SCG3809	COM-AB793-CENTL Program	No	Local Third Party	Commercial	Resource Acquisition		\$ 3,000	\$ 5,293	\$ 3,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCG3813		COM-Savings By Design	No	Core PA	Commercial	Resource Acquisition		\$ 578,000	\$ 134,692	\$ 23,000	\$ -	\$ 200,000	\$ 100,000	\$ 323,000	\$ -	\$ 323,000	\$ 323,000
SCG3825	SCG3825	COM-HVAC QIOM	No	Core PA	Commercial	Resource Acquisition		\$ 41,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCG3834		COM-LADWP Direct Install	No	Local Third Party	Commercial	Resource Acquisition		\$ 76,810	\$ 2,846	\$ 5,681	\$ 5,000	\$ 10,019	\$ 56,112	\$ 76,812	\$ -	\$ 76,812	\$ 76,812
SCG3835	SCG3835	COM-Pasadena Direct Install	No	Local Third Party	Commercial	Resource Acquisition		\$ 76,470	\$ 800	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCG3845	SCG3845	COM-SMB Solicitation	No	Local Third Party	Commercial	Resource Acquisition		\$ 3,469,704	\$ 81,261	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCG3866	SCG3866	COM-Large Solicitation	No	Local Third Party	Commercial	Resource Acquisition		\$ 5,229,547	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCG3882		COM-Small and Medium Commercial EE Program	No	Local Third Party	Commercial	Resource Acquisition		\$ -	\$ 172,198	\$ 172,104	\$ 114,289	\$ 272,374	\$ 960,468	\$ 1,519,235	\$ -	\$ 1,519,235	\$ 1,519,235
SCG3887		COM-Commercial Building Energy Solutions & Technology	No	Local Third Party	Commercial	Resource Acquisition		\$ -	\$ 154,292	\$ 307,905	\$ 208,105	\$ 1,125,037	\$ 1,161,599	\$ 2,802,649	\$ -	\$ 2,802,649	\$ 2,802,649
SCG3891		COM-Service RCx Program	No	Local Third Party	Commercial	Resource Acquisition		\$ -	\$ 3,478	\$ 80,000	\$ -	\$ 854,331	\$ -	\$ 914,331	\$ -	\$ 914,331	\$ 914,331
SCG3892		COM-Large Commercial Program	No	Local Third Party	Commercial	Resource Acquisition		\$ -	\$ -	\$ 459,472	\$ 257,683	\$ 2,201,844	\$ 1,499,639	\$ 4,420,598	\$ -	\$ 4,420,598	\$ 4,420,598
SCG3898		COM-Behavioral Program	No	Local Third Party	Commercial	Resource Acquisition		\$ -	\$ -	\$ 105,000	\$ -	\$ 1,095,000	\$ -	\$ 1,200,000	\$ -	\$ 1,200,000	\$ 1,200,000
SCG SW NC NonRes_Com_mixed		COM-SW-NonRes New Construction	No	SW Third Party	Commercial	Market Support		\$ 167,200	\$ -	\$ 1,897	\$ 1,625	\$ 7,430	\$ 10,693	\$ 21,745	\$ -	\$ 21,745	\$ 21,745
SCG SW NC NonRes_Com_mixed PA		COM-SW-NonRes New Construction-PA	No	Core PA	Commercial	Resource Acquisition		\$ 16,720	\$ -	\$ 2,000	\$ -	\$ -	\$ -	\$ 2,000	\$ -	\$ 2,000	\$ 2,000
SCG SW FS		COM-SW-Point of Sale Food Service	No	SW Third Party	Commercial	Resource Acquisition		\$ 2,945,664	\$ 490,944	\$ 332,996	\$ 260,932	\$ 1,492,247	\$ 1,758,418	\$ 3,845,332	\$ -	\$ 3,845,332	\$ 3,845,332
SCG SW FS PA		COM-SW-Point of Sale Food Service-PA	No	Core PA	Commercial	Resource Acquisition		\$ 216,787	\$ -	\$ 30,840	\$ -	\$ 318,928	\$ -	\$ 349,768	\$ -	\$ 349,768	\$ 349,768
SCG3793		COM-SW-Instant Retailer Foodservice POS-Solic	No	SW Third Party	Commercial	Resource Acquisition		\$ -	\$ 495,806	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCG SW MCWH		COM-SW-Midstream Commercial Water Heating	No	SW Third Party	Commercial	Resource Acquisition		\$ 3,118,565	\$ 519,761	\$ 285,690	\$ 193,345	\$ 655,632	\$ 2,569,668	\$ 3,684,335	\$ -	\$ 3,684,335	\$ 3,684,335
SCG SW MCWH PA		COM-SW-Midstream Commercial Water Heating-PA	No	Core PA	Commercial	Resource Acquisition		\$ 202,845	\$ 996	\$ 30,141	\$ -	\$ 299,098	\$ -	\$ 329,239	\$ -	\$ 329,239	\$ 329,239
SCG3714		COM-SW-Midstream Water Heating-Solic	No	SW Third Party	Commercial	Resource Acquisition		\$ 581,280	\$ 591,280	\$ 47,823	\$ 25,393	\$ 268,374	\$ 753,323	\$ 1,094,913	\$ -	\$ 1,094,913	\$ 1,094,913
SCG SW HVAC Up		COM-SW-Upstream HVAC	No	SW Third Party	Commercial	Resource Acquisition		\$ 864,586	\$ 247,024	\$ 47,823	\$ 25,393	\$ 268,374	\$ 753,323	\$ 1,094,913	\$ -	\$ 1,094,913	\$ 1,094,913
SCG SW HVAC Up PA		COM-SW-Upstream HVAC-PA	No	Core PA	Commercial	Resource Acquisition		\$ 86,459	\$ -	\$ 20,000	\$ -	\$ -	\$ -	\$ 20,000	\$ -	\$ 20,000	\$ 20,000
<b>Public Programs</b>																	
SCG3742	SCG3742	PUB-LA Co Partnership	Yes	Core PA	Public	Market Support		\$ 190,107	\$ 68,823	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCG3746	SCG3746	PUB-Santa Barbara Co Partnership	Yes	Core PA	Public	Market Support		\$ 127,070	\$ 57,812	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCG3747	SCG3747	PUB-South Bay Cities Partnership	Yes	Core PA	Public	Market Support		\$ 151,554	\$ 66,974	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCG3748	SCG3748	PUB-San Luis Obispo Co Partnership	Yes	Core PA	Public	Market Support		\$ 92,206	\$ 36,217	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCG3749	SCG3749	PUB-San Joaquin Valley Partnership	Yes	Core PA	Public	Market Support		\$ 113,007	\$ 49								

Budget Year: 2022-2023  
(Report budgets to the \$-do not round)  
Table 4 -- Budget, Spent, Unspent, Carryover Details

New/Existing Program #	Discontinued Program #	Program Name	Target Exempt	Program Type	Business Sector	Portfolio Segment	Pre-2020 Unspent/Uncommitted EE Funds 5	2021 Authorized Budget	2021 Forecasted Unspent/Uncommitted Funds as of 7/31/2021	2021 Budget Spent as of 07/31/2021	Administrative	Marketing/Outreach	Direct Implementation Non-Incentive	Incentive/Rebate	2022 PA Spending Budget Request	2022 PA Pre-2020 Uncommitted and Unspent Carryover Balance	2022 PA Revenue Requirement
SCG3726	SCG3729	C&S-Planning Coordination	Yes	Core PA	Codes & Standards	Codes & Standards	\$ 310,000	\$ 42,169	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCG SW CSA Bldg		C&S-SW-Building Codes Advocacy	Yes	SW Third Party	Codes & Standards	Codes & Standards	\$ 470,226	\$ 274,296	\$ -	\$ -	\$ 501,468	\$ -	\$ -	\$ -	\$ 501,468	\$ -	\$ 501,468
SCG SW CSA Appl		C&S-SW-Appliance Standards Advocacy	Yes	SW Third Party	Codes & Standards	Codes & Standards	\$ 331,024	\$ 193,097	\$ -	\$ -	\$ 152,772	\$ -	\$ -	\$ -	\$ 152,772	\$ -	\$ 152,772
SCG SW CSA Natl		C&S-SW-Federal Codes Advocacy	Yes	SW Third Party	Codes & Standards	Codes & Standards	\$ 298,509	\$ 174,130	\$ -	\$ -	\$ 445,518	\$ -	\$ -	\$ -	\$ 445,518	\$ -	\$ 445,518
SCG SW CSA Bldg PA		C&S-SW-Building Codes Advocacy-PA	Yes	Core PA	Codes & Standards	Codes & Standards	\$ 1,553	\$ -	\$ 2,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,000	\$ -	\$ 2,000
SCG SW CSA Appl PA		C&S-SW-Appliance Standards Advocacy-PA	Yes	Core PA	Codes & Standards	Codes & Standards	\$ 2,507	\$ -	\$ 2,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,000	\$ -	\$ 2,000
SCG SW CSA Natl PA		C&S-SW-Federal Codes Advocacy-PA	Yes	Core PA	Codes & Standards	Codes & Standards	\$ 1,439	\$ -	\$ 2,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,000	\$ -	\$ 2,000
<b>Workforce Education &amp; Training Programs</b>																	
SCG3729		WE&T-Integrated Energy Efficiency Training	Yes	Core PA	WE&T	Market Support	\$ 3,250,000	\$ 1,324,650	\$ 276,000	\$ 131,000	\$ 3,843,000	\$ -	\$ -	\$ -	\$ 4,250,000	\$ -	\$ 4,250,000
SCG3730	SCG3730	WE&T-Connectors	Yes	Core PA	WE&T	Market Support	\$ 291,000	\$ 141,345	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCG3760		WE&T-HERS Rater Training Advancement	Yes	Local Third Party	WE&T	Market Support	\$ 308,000	\$ 138,632	\$ 45,650	\$ 18,000	\$ 444,350	\$ -	\$ -	\$ -	\$ 508,000	\$ -	\$ 508,000
SCG SW WET Work		WE&T-SW-WE&T Career and Workforce Readiness	Yes	SW Third Party	WE&T	Equity	\$ 103,023	\$ -	\$ 13,066	\$ 9,396	\$ 124,345	\$ -	\$ -	\$ -	\$ 146,806	\$ -	\$ 146,806
SCG SW WET Work PA		WE&T-SW-WE&T Career and Workforce Readiness-PA	Yes	Core PA	WE&T	Equity	\$ 5,151	\$ -	\$ 14,500	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 14,500	\$ -	\$ 14,500
SCG SW WET CC		WE&T-SW-WE&T Career Connections	Yes	SW Third Party	WE&T	Market Support	\$ 48,767	\$ -	\$ 836	\$ 5,225	\$ 77,539	\$ -	\$ -	\$ -	\$ 83,600	\$ -	\$ 83,600
SCG SW WET CC PA		WE&T-SW-WE&T Career Connections-PA	Yes	Core PA	WE&T	Market Support	\$ 2,439	\$ -	\$ 14,500	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 14,500	\$ -	\$ 14,500
<b>Financing Programs</b>																	
SCG3735		FIN-On-Bill Financing	Yes	Core PA	Finance	Market Support	\$ 650,000	\$ 97,191	\$ 50,000	\$ 25,000	\$ 575,000	\$ -	\$ -	\$ -	\$ 650,000	\$ -	\$ 650,000
<b>Other Programs</b>																	
SCG3771		SOL-IDEEA365	No	Core PA	Residential	Market Support	\$ 1,080,000	\$ 471,178	\$ 40,000	\$ -	\$ 176,000	\$ -	\$ -	\$ -	\$ 216,000	\$ -	\$ 216,000
SCG3771		SOL-IDEEA365	No	Core PA	Commercial	Market Support	\$ -	\$ -	\$ 40,000	\$ -	\$ 176,000	\$ -	\$ -	\$ -	\$ 216,000	\$ -	\$ 216,000
SCG3771		SOL-IDEEA365	No	Core PA	Public	Market Support	\$ -	\$ -	\$ 40,000	\$ -	\$ 176,000	\$ -	\$ -	\$ -	\$ 216,000	\$ -	\$ 216,000
SCG3771		SOL-IDEEA365	No	Core PA	Industrial	Market Support	\$ -	\$ -	\$ 40,000	\$ -	\$ 176,000	\$ -	\$ -	\$ -	\$ 216,000	\$ -	\$ 216,000
SCG3771		SOL-IDEEA365	No	Core PA	Agriculture	Market Support	\$ -	\$ -	\$ 40,000	\$ -	\$ 176,000	\$ -	\$ -	\$ -	\$ 216,000	\$ -	\$ 216,000
SCG3771		SOL-IDEEA365	No	Local Third Party	Residential	Market Support	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCG3771		SOL-IDEEA365	No	Local Third Party	Commercial	Market Support	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCG3771		SOL-IDEEA365	No	Local Third Party	Public	Market Support	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCG3771		SOL-IDEEA365	No	Local Third Party	Industrial	Market Support	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCG3771		SOL-IDEEA365	No	Local Third Party	Agriculture	Market Support	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCG3909		CC-Nonresidential Energy Advisor	Yes	Core PA	Commercial	Market Support	\$ -	\$ -	\$ 31,600	\$ -	\$ 220,000	\$ -	\$ -	\$ -	\$ 251,600	\$ -	\$ 251,600
SCG3909		CC-Nonresidential Energy Advisor	Yes	Core PA	Public	Market Support	\$ -	\$ -	\$ 23,700	\$ -	\$ 165,000	\$ -	\$ -	\$ -	\$ 188,700	\$ -	\$ 188,700
SCG3909		CC-Nonresidential Energy Advisor	Yes	Core PA	Industrial	Market Support	\$ -	\$ -	\$ 15,800	\$ -	\$ 110,000	\$ -	\$ -	\$ -	\$ 125,800	\$ -	\$ 125,800
SCG3909		CC-Nonresidential Energy Advisor	Yes	Core PA	Agriculture	Market Support	\$ -	\$ -	\$ 7,900	\$ -	\$ 55,000	\$ -	\$ -	\$ -	\$ 62,900	\$ -	\$ 62,900
SCG3909		CC-Nonresidential Energy Advisor	Yes	Local Third Party	Commercial	Market Support	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCG3909		CC-Nonresidential Energy Advisor	Yes	Local Third Party	Public	Market Support	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCG3909		CC-Nonresidential Energy Advisor	Yes	Local Third Party	Industrial	Market Support	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCG3909		CC-Nonresidential Energy Advisor	Yes	Local Third Party	Agriculture	Market Support	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SCG3910		CC-Nonresidential Calculated Incentives	No	Core PA	Commercial	Resource Acquisition	\$ -	\$ -	\$ 195,300	\$ 36,900	\$ 1,385,100	\$ 1,500,000	\$ -	\$ -	\$ 3,117,300	\$ -	\$ 3,117,300
SCG3910		CC-Nonresidential Calculated Incentives	No	Core PA	Public	Resource Acquisition	\$ -	\$ -	\$ 97,650	\$ 18,450	\$ 692,550	\$ 750,000	\$ -	\$ -	\$ 1,558,650	\$ -	\$ 1,558,650
SCG3910		CC-Nonresidential Calculated Incentives	No	Core PA	Industrial	Resource Acquisition	\$ -	\$ -	\$ 325,500	\$ 61,500	\$ 2,308,500	\$ 2,500,000	\$ -	\$ -	\$ 5,195,500	\$ -	\$ 5,195,500
SCG3910		CC-Nonresidential Calculated Incentives	No	Core PA	Agriculture	Resource Acquisition	\$ -	\$ -	\$ 6,150	\$ 6,150	\$ 230,850	\$ 250,000	\$ -	\$ -	\$ 519,550	\$ -	\$ 519,550
SCG3911		CC-Nonresidential Deemed Incentives	No	Core PA	Commercial	Resource Acquisition	\$ -	\$ -	\$ 414,150	\$ 651,750	\$ 2,171,784	\$ 2,577,135	\$ -	\$ -	\$ 5,814,819	\$ -	\$ 5,814,819
SCG3911		CC-Nonresidential Deemed Incentives	No	Core PA	Public	Resource Acquisition	\$ -	\$ -	\$ 150,600	\$ 237,000	\$ 780,740	\$ 937,140	\$ -	\$ -	\$ 2,114,480	\$ -	\$ 2,114,480
SCG3911		CC-Nonresidential Deemed Incentives	No	Core PA	Industrial	Resource Acquisition	\$ -	\$ -	\$ 112,950	\$ 177,750	\$ 592,305	\$ 702,855	\$ -	\$ -	\$ 1,585,860	\$ -	\$ 1,585,860
SCG3911		CC-Nonresidential Deemed Incentives	No	Core PA	Agriculture	Resource Acquisition	\$ -	\$ -	\$ 75,300	\$ 118,500	\$ 394,870	\$ 468,570	\$ -	\$ -	\$ 1,057,240	\$ -	\$ 1,057,240
SCG3901		CC-Outreach Solicitation	Yes	Local Third Party	Residential	Equity	\$ -	\$ -	\$ 45,000	\$ 36,000	\$ 540,000	\$ -	\$ -	\$ -	\$ 630,000	\$ -	\$ 630,000
SCG3901		CC-Outreach Solicitation	Yes	Local Third Party	Commercial	Equity	\$ -	\$ -	\$ 30,000	\$ 24,000	\$ 366,000	\$ -	\$ -	\$ -	\$ 420,000	\$ -	\$ 420,000
<b>PA PROGRAM TOTAL</b>																	
							\$ -	\$ 101,773,724	\$ -	\$ 41,352,713	\$ 8,115,759	\$ 5,489,642	\$ 49,829,490	\$ 56,170,614	\$ 119,605,506	\$ -	\$ 119,605,506
<b>EM&amp;V (PA &amp; ED Portions) Total 4</b>																	
								\$ 1,215,775		\$ 208,441					\$ 1,370,480		\$ 1,370,480
								\$ 3,205,226							\$ 3,875,199		\$ 3,875,199
								\$ 4,421,001		\$ 208,441					\$ 5,245,679		\$ 5,245,679
<b>PA Program and EM&amp;V Total</b>																	
							\$ -	\$ 106,194,725	\$ -	\$ 41,561,154	\$ 8,115,759	\$ 5,489,642	\$ 49,829,490	\$ 56,170,614	\$ 124,851,185	\$ -	\$ 124,851,185
<b>CEC AB 841 Program Budget-IOU PA only</b>																	
															\$ -	\$ -	\$ -
															\$ 382,120	\$ -	\$ -
															\$ 382,120	\$ -	\$ -
															\$ 2,500,000	\$ -	\$ -
<b>PA Spending Budget Request (PA Program and EM&amp;V + CEC AB 841)</b>																	
							\$ -	\$ 106,194,725	\$ -	\$ 44,061,154	\$ 8,115,759	\$ 5,489,642	\$ 49,829,490	\$ 56,170,614	\$ 125,233,305	\$ -	\$ 124,851,185
<b>Financing Pilot Programs</b>																	
SCG3737		FIN-SW-New Financing Offerings					\$ 0	\$ 1,430,875	\$ 268,878	\$ 200,000	\$ 400,000	\$ 200,000	\$ -	\$ -	\$ 800,000	\$ -	\$ 800,000
<b>Financing Pilot Programs Total</b>																	
							\$ -	\$ 1,430,875	\$ -	\$ 268,878	\$ 200,000	\$ 400,000	\$ 200,000	\$ -	\$ 800,000	\$ -	\$ 800,000
<b>ME&amp;O &amp; ESA</b>																	
								\$ 1,989,981		\$ 931,819	\$ 869,364	\$ 1,606,551	\$ 1,105,815	\$ 857	\$ -	\$ -	\$ -
										\$ 869,364	\$ 1,606,551	\$ 1,105,815	\$ 857	\$ 116,291,772	\$ -	\$ 116,291,772	

Notes: (PA to add as needed, e.g., relevant advice letter references, decision references and any other needed explanations.)

1 ME&O requested budget for 2021 per AL 5742-G.

2 Per D.21-01-004, percentage allocation is 70% for 2022 and 60% for 2023.

3 Costs reflected are DSMBA costs.

4 For all PAs, EM&V costs only includes IOU's Total EM&V budget (PA + ED). For the IOU EM&V budget it does not include REN or CCAs EM&V budget.

5 PAs have the option of inputting by program or by total.

6 CPU's Utility Audits, Risk and Compliance Division concluded SCG's unspent and uncommitted to be \$1,463,808 for PY 2020, however SCG had already paid CEC \$2,500,000 prior to that report, so SCG overpaid CEC \$1,036,192.

Table 4 – Budget, Spent, Unspent, Carryover Details

		2022											2023																
New/Existing Program #	Discontinued Program #	Program Name	First Year Net KWH	First Year Net KW	First Year Net Therms	First Year Net Elec CO2 (ton)	First Year Net Gas CO2 (ton)	Lifecycle Net KWH	Lifecycle Net Therms	Lifecycle Net Elec CO2 (Ton)	Lifecycle Net Gas CO2 (Ton)	Administrative	Marketing/Outreach	Direct Implementation Non-Incentive	Incentive/Rebate	2023 PA Spending Budget Request	2023 PA Pre-2020 Uncommitted and Unspent Carryover Balance	2023 PA Revenue Requirement	First Year Net KWH	First Year Net KW	First Year Net Therms	First Year Net Elec CO2 (ton)	First Year Net Gas CO2 (ton)	Lifecycle Net KWH	Lifecycle Net Therms	Lifecycle Net Elec CO2 (Ton)	Lifecycle Net Gas CO2 (Ton)		
<b>Residential Programs</b>																													
SCG3701		RES-Energy Advisor	-	-	-	-	-	-	-	-	-	\$ 32,000	\$ 40,000	\$ 704,000	\$ -	\$ 776,000	\$ -	\$ 776,000	-	-	-	-	-	-	-	-	-	-	
SCG3702		RES-Residential Energy Efficiency Program	(41,641)	55	912,689	(22)	5,339	(456,693)	16,537,446	(271)	96,744	\$ 611,000	\$ 1,447,000	\$ 1,759,714	\$ 12,950,150	\$ 16,767,864	\$ -	\$ 16,767,864	(59,678)	70	1,007,417	(33)	5,893	(667,583)	18,618,893	(411)	108,921		
SCG3705		RES-Home Upgrade Program	-	-	335,889	-	1,965	-	5,542,167	-	32,422	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-	-	-	-	-	-	-	-	
SCG3706	SCG3706	RES-Home Upgrade Program	-	-	-	-	-	-	-	-	-	\$ 88,000	\$ 155,000	\$ 1,373,000	\$ 4,401,996	\$ 6,017,996	\$ -	\$ 6,017,996	-	-	-	364,902	-	2,135	-	6,020,888	-	35,222	
SCG3707		RES-RNC	-	-	-	-	-	-	-	-	-	\$ 80,000	\$ -	\$ 336,000	\$ -	\$ 416,000	\$ -	\$ 416,000	-	-	-	-	-	-	-	-	-	-	
SCG3764		RES-LivingWise	-	-	1,330,133	-	7,781	-	10,382,360	-	60,737	\$ 99,760	\$ 40,471	\$ 451,984	\$ 1,110,200	\$ 1,702,415	\$ -	\$ 1,702,415	-	-	-	1,330,133	-	7,781	-	10,382,360	-	60,737	
SCG3765		RES-Manufactured Mobile Home	-	-	-	-	-	-	-	-	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-	-	-	-	-	-	-	-	
SCG3810	SCG3765	RES-AB793-REMTS Program	-	-	35,001	-	205	-	350,014	-	2,048	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-	-	-	-	-	-	-	-	
SCG3823		RES-HVAC QIOM	-	-	-	-	-	-	-	-	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-	-	-	-	-	-	-	-	
SCG3824		RES-Behavioral Program	-	-	11,147,163	-	65,211	-	11,147,163	-	65,211	\$ 180,000	\$ -	\$ 4,560,539	\$ -	\$ 4,740,539	\$ -	\$ 4,740,539	-	-	-	11,188,666	-	65,454	-	11,188,666	-	65,454	
SCG3829		RES-Marketplace	-	-	-	-	-	-	-	-	-	\$ 21,750	\$ 90,000	\$ 1,445,000	\$ -	\$ 1,556,750	\$ -	\$ 1,556,750	-	-	-	-	-	-	-	-	-	-	
SCG3881		RES-Retail Partnering	-	-	-	-	-	-	-	-	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-	-	-	-	-	-	-	-	
SCG3830		RES-Retail Partnering	-	-	-	-	-	-	-	-	-	\$ 10,000	\$ -	\$ 750,000	\$ -	\$ 760,000	\$ -	\$ 760,000	-	-	-	-	-	-	-	-	-	-	
SCG3831		RES-EE Kits	-	-	32,164	-	188	-	275,688	-	1,613	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-	-	-	-	-	-	-	-	
SCG3831		RES-EE Kits	-	-	-	-	-	-	-	-	-	\$ 5,000	\$ -	\$ 20,000	\$ 125,000	\$ 150,000	\$ -	\$ 150,000	-	-	-	32,164	-	188	-	275,688	-	1,613	
SCG3832		RES-Pasadena Home Upgrade	-	-	58,800	-	344	-	870,200	-	5,676	\$ 23,130	\$ -	\$ 54,170	\$ 420,000	\$ 497,300	\$ -	\$ 497,300	-	-	-	58,800	-	344	-	870,200	-	5,676	
SCG3833		RES-Burbank Home Upgrade	-	-	42,000	-	246	-	693,000	-	4,054	\$ 23,550	\$ -	\$ 50,975	\$ 300,000	\$ 374,525	\$ -	\$ 374,525	-	-	-	42,000	-	246	-	693,000	-	4,054	
SCG3836	SCG3836	RES-LADWP HVAC	-	-	-	-	-	-	-	-	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-	-	-	-	-	-	-	-	
SCG3843	SCG3843	RES-SF Solicitation	-	-	-	-	-	-	-	-	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-	-	-	-	-	-	-	-	
SCG3844	SCG3844	RES-MF Solicitation	-	-	-	-	-	-	-	-	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-	-	-	-	-	-	-	-	
SCG3861		RES-Community Language Efficiency Outreach-Direct Install	-	-	94,692	-	554	-	945,768	-	5,533	\$ 94,305	\$ 63,860	\$ 720,778	\$ 2,437,215	\$ 3,316,158	\$ -	\$ 3,316,158	-	-	-	94,692	-	554	-	945,768	-	5,533	
SCG3867	SCG3867	RES-MH Solicitation	-	-	-	-	-	-	-	-	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-	-	-	-	-	-	-	-	
SCG3883		RES-Residential Advanced Clean Energy	260,099	369	124,150	65	726	4,140,696	1,659,969	1,273	9,711	\$ 165,000	\$ 90,000	\$ 435,000	\$ 2,460,353	\$ 3,150,353	\$ -	\$ 3,150,353	260,099	369	124,150	76	726	4,140,696	1,659,969	1,392	9,711		
SCG3884		RES-Comprehensive MH Program (Synergy)	189,245	117	106,222	55	625	3,415,307	1,303,475	1,178	7,625	\$ 94,000	\$ 48,000	\$ 246,000	\$ 1,311,958	\$ 1,699,958	\$ -	\$ 1,699,958	189,245	117	106,222	57	621	3,415,307	1,303,475	1,200	7,625		
SCG3885		RES-Residential MH Program (Staples Energy)	71,114	43	59,975	20	351	1,280,061	666,232	430	3,897	\$ 84,188	\$ 52,913	\$ 326,639	\$ 536,260	\$ 1,000,000	\$ -	\$ 1,000,000	71,114	43	59,975	21	351	1,280,061	666,232	438	3,897		
SCG3889		RES-Retail Partnering and Water Heating Controls	8,185	7	5,187	4	30	122,482	84,728	79	379	\$ 75,363	\$ 9,364	\$ 112,834	\$ 450,182	\$ 648,284	\$ -	\$ 648,284	8,185	7	5,187	4	30	122,482	84,728	81	379		
SCG3889		RES-Multifamily Energy Alliance	252,695	15	209,898	79	1,228	2,427,685	2,085,000	881	12,197	\$ 147,468	\$ 102,483	\$ 514,842	\$ 2,213,061	\$ 2,977,855	\$ -	\$ 2,977,855	252,695	15	209,898	23	314,668	130	1,941	3,846,852	3,125,462	1,413	18,284
SCG SW NC Res mixed		RES-SW-New Construction	550,841	-	(15)	122	6,084,181	(267)	1,785	11,987	\$ 11,987	\$ 14,044	\$ 60,272	\$ 126,505	\$ 212,807	\$ -	\$ 212,807	550,841	-	(15)	122	6,084,181	(267)	1,785	11,987	14,044	60,272	126,505	
SCG SW NC Res mixed PA		RES-SW-New Construction-PA	-	-	-	-	-	-	-	-	-	\$ 20,000	\$ -	\$ 28,000	\$ -	\$ 48,000	\$ -	\$ 48,000	-	-	-	-	-	-	-	-	-	-	
SCG SW NC NonRes Res mixed		RES-SW-NonRes New Construction	-	6	988	-	6	339,511	14,825	98	87	\$ 15,500	\$ 12,649	\$ 57,823	\$ 74,285	\$ 160,267	\$ -	\$ 160,267	-	6	988	77	13,036	76	76	4,477,927	195,537	1,320	
SCG SW NC NonRes Res mixed PA		RES-SW-NonRes New Construction-PA	-	-	-	-	-	-	-	-	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-	-	-	-	-	-	-	-	-	
SCG SW PLA		RES-SW-Plug Load and Appliance	1,315,589	251	45,109	311	264	13,155,894	451,088	3,585	2,639	\$ 57,375	\$ 135,005	\$ 451,228	\$ 632,264	\$ 1,275,873	\$ -	\$ 1,275,873	1,315,589	251	45,109	311	264	13,155,894	451,088	3,585	2,639		
SCG SW PLA PA		RES-SW-Plug Load and Appliance-PA	-	-	-	-	-	-	-	-	-	\$ 23,000	\$ -	\$ -	\$ -	\$ 23,000	\$ -	\$ 23,000	-	-	-	-	-	-	-	-	-	-	
SCG SW HVAC QIOM		RES-SW-QIOM	-	-	-	-	-	-	-	-	-	\$ 57,684	\$ 46,147	\$ 473,009	\$ -	\$ 576,840	\$ -	\$ 576,840	-	-	-	-	-	-	-	-	-	-	
SCG SW HVAC QIOM PA		RES-SW-QIOM-PA	-	-	-	-	-	-	-	-	-	\$ 20,000	\$ -	\$ -	\$ -	\$ 20,000	\$ -	\$ 20,000	-	-	-	-	-	-	-	-	-	-	
<b>Commercial Programs</b>																													
SCG3708	SCG3708	COM-Energy Advisor	-	-	-	-	-	-	-	-	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-	-	-	-	-	-	-	-	
SCG3710	SCG3710	COM-Calculated Incentives	-	-	-	-	-	-	-	-	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-	-	-	-	-	-	-	-	
SCG3711	SCG3711	COM-Deemed Incentives	-	-	-	-	-	-	-	-	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-	-	-	-	-	-	-	-	
SCG3809	SCG3809	COM-AB793-CENTL Program	-	-	-	-	-	-	-	-	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-	-	-	-	-	-	-	-	
SCG3813		COM-Savings By Design	-	-	-	-	-	-	-	-	-	\$ 23,000	\$ -	\$ 195,000	\$ -	\$ 218,000	\$ -	\$ 218,000	-	-	-	-	-	-	-	-	-	-	
SCG3825		COM-HVAC QIOM	-	-	-	-	-	-	-	-	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-	-	-	-	-	-	-	-	
SCG3834		COM-LADWP Direct Install	-	-	22,488	-	132	-	243,437	-	1,424	\$ 5,681	\$ 5,000	\$ 10,019	\$ 56,112	\$ 76,812	\$ -	\$ 76,812	-	-	-	22,488	-	132	-	243,437	-	1,424	
SCG3835	SCG3835	COM-Pasadena Direct Install	-	-	-	-	-	-	-	-	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-	-	-	-	-	-	-	-	
SCG3845	SCG3845	COM-SMB Solicitation	-	-	-	-	-	-	-	-	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-	-	-	-	-	-	-	-	
SCG3866	SCG3866	COM-Large Solicitation	-	-	-	-	-	-	-	-	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-	-	-	-	-	-	-	-	
SCG3882		COM-Small and Medium Commercial EE Program	32,959	5	136,635	8	799	401,054	1,368,218	114	8,004	\$ 150,296	\$ 90,245	\$ 319,554	\$ 939,931	\$ 1,500,026	\$ -	\$ 1,500,026	32,959	5	136,635	9	233,678	14	1,367	696,314	2,374,041	203	13,888
SCG3887		COM-Commercial Building Energy Solutions & Technology	126,421	19	371,845	29	2,175	1,483,927	4,242,057	417	24,816	\$ 196,745	\$ 124,86																



(report budgets to the \$--do not round; add rows as needed)

Programs to be closed with the disposition of 2022-2023 BBAL

PA Justification	Third Party Implementer or Core	Statewide or Local	Programs to be Closed with the Disposition of 2022-2023 ABAL	% change	2020 Claimed TRC	2021 (Q2) Claimed TRC	2022 Filed TRC	2023 Filed TRC	2021 Budget	2022 Budget	2023 Budget	Year Program Started	For existing third party implemented programs, MM/YY Program was due to sunset prior to PY 2022-2023 ABAL planning and new 3P contracting	For existing third party implemented programs, MM/YY Program is extended to as a result of PY 2022-2023 ABAL planning and timing for new 3P contracts' ramp up
This program will be closed due to the new SW Upstream HVAC program in place.	Core	Local	RES-Residential HVAC Upstream		1.32	1.52			\$ 500,000			2013		
This program will be closed due to the new SW Upstream HVAC program in place as well as end of contract with implementer.	Third party	Local	RES-LADWP HVAC		1.07	-			\$ 1,329,300			2019	Dec-21	
This program will be closed due to the new SW HVAC QI/QM program launching in 2022.	Core	Local	COM-HVAC QI/QM		-	-			\$ 41,000			2019		
This program will be closed due to new third-party small/medium commercial programs.	Third party	Local	COM-Pasadena Direct Install		-	-			\$ 76,470			2019	Dec-21	
This local government partnership will be closed as part of the strategy to support Public Sector customers through the Regional Energy Pathways program.	Core	Local	PUB-Public Sector EE Market Support & Innovation		-	-			\$ 356,258			2013		
This local government partnership will be closed as part of the strategy to support Public Sector customers through the Regional Energy Pathways program.	Core	Local	PUB-Public Sector Regional Resources		-	-			\$ 583,424			2013		
This local government partnership will be closed as part of the strategy to support Public Sector customers through the Regional Energy Pathways program.	Core	Local	PUB-LA Co Partnership		-	-			\$ 180,107			2004		
This local government partnership will be closed as part of the strategy to support Public Sector customers through the Regional Energy Pathways program.	Core	Local	PUB-Santa Barbara Co Partnership		-	-			\$ 127,070			2010		
This local government partnership will be closed as part of the strategy to support Public Sector customers through the Regional Energy Pathways program.	Core	Local	PUB-South Bay Cities Partnership		-	-			\$ 151,554			2004		
This local government partnership will be closed as part of the strategy to support Public Sector customers through the Regional Energy Pathways program.	Core	Local	PUB-San Luis Obispo Co Partnership		-	-			\$ 92,206			2010		
This local government partnership will be closed as part of the strategy to support Public Sector customers through the Regional Energy Pathways program.	Core	Local	PUB-San Joaquin Valley Partnership		-	-			\$ 113,007			2010		
This local government partnership will be closed as part of the strategy to support Public Sector customers through the Regional Energy Pathways program.	Core	Local	PUB-Orange County Cities Partnership		-	-			\$ 256,467			2013		
This local government partnership will be closed as part of the strategy to support Public Sector customers through the Regional Energy Pathways program.	Core	Local	PUB-Ventura County Partnership		-	-			\$ 202,737			2004		
This local government partnership will be closed as part of the strategy to support Public Sector customers through the Regional Energy Pathways program.	Core	Local	PUB-Gateway Cities Partnership		-	-			\$ 152,576			2013		
This local government partnership will be closed as part of the strategy to support Public Sector customers through the Regional Energy Pathways program.	Core	Local	PUB-San Gabriel Valley COG Partnership		-	-			\$ 166,896			2013		
This local government partnership will be closed as part of the strategy to support Public Sector customers through the Regional Energy Pathways program.	Core	Local	PUB-West Side Community Energy Partnership		-	-			\$ 151,194			2013		
This local government partnership will be closed as part of the strategy to support Public Sector customers through the Regional Energy Pathways program.	Core	Local	PUB-Western Riverside Energy Partnership		-	-			\$ 245,945			2013		
This local government partnership will be closed as part of the strategy to support Public Sector customers through the Regional Energy Pathways program.	Core	Local	PUB-San Bernardino Regional Energy Partnership		-	-			\$ 200,994			2015		
This institutional partnership will be closed due to the new SW State of California partnership in place.	Core	Local	PUB-CA Department of Corrections Partnership		-	-			\$ 190,570			2006		
This institutional partnership will be closed due to the new SW State of California partnership in place.	Core	Local	PUB-State of CA/IOU Partnership		-	-			\$ 196,139			2006		
This program will be closed per CPUC requirement.	Core	Local	C&S-Compliance Enhancement		-	-			\$ 582,000			2013		
This program will be closed per CPUC requirement.	Core	Local	C&S-Reach Codes		-	-			\$ 143,000			2013		
This program will be closed per CPUC requirement.	Core	Local	C&S Planning Coordination		-	-			\$ 310,000			2013		
This program will be closed due to the new SW WE&T Career Connections program in place.	Core	Local	WE&T-Connections		-	-			\$ 291,000			2010		
This program will be closed due to the new SW Gas Emerging Technology program in place.	Core	Local	ET-Technology Development Support		-	-			\$ 69,357			2013		
This program will be closed due to the new SW Gas Emerging Technology program in place.	Core	Local	ET-Technology Assessment Support		-	-			\$ 329,015			2013		
This program will be closed due to the new SW Gas Emerging Technology program in place.	Core	Local	ET-Technology Introduction Support		-	-			\$ 387,329			2013		
This program will be closed due to new third-party manufactured homes program in place.	Third party	Local	RES-Manufactured Mobile Homes		1.15	-			\$ 330,000			2010	Mar-21	
This solicitation placeholder will be closed due to new third party program in place.	Third party	Local	RES-Single Family Solicitation		0.36	0.06			\$ 2,998,599			2020		
This solicitation placeholder will be closed due to new third party program in place.	Third party	Local	RES-Multifamily Solicitation		-	-			\$ 2,042,627			2020		
This solicitation placeholder will be closed due to new third party program in place.	Third party	Local	RES-Mobile Home Solicitation		-	-			\$ 2,502,450			2021		
This solicitation placeholder will be closed due to new third party program in place.	Third party	Local	COM-SMB Solicitation		-	-			\$ 3,469,704			2020		
This solicitation placeholder will be closed due to new third party program in place.	Third party	Local	COM-Large Solicitation		-	-			\$ 5,229,547			2021		
This solicitation placeholder will be closed due to new third party program in place.	Third party	Local	PUB-SM Solicitation		-	-			\$ 1,936,000			2020		
This solicitation placeholder will be closed due to new third party program in place.	Third party	Local	AG-Agricultural Solicitation		-	-			\$ 3,003,422			2021		



This program will be closed in 2022 due to the new SW HVAC QI/QM program launching in 2022.	Core	Local	RES-HVAC QI/QM		-	-	-		\$ 250,000	\$ 250,000			2010	
This program will be closed in 2022 due to the new SW Higher Education institutional partnership launching in 2022.	Core	Local	PUB-California Community College Partnership		-	-	-		\$ 240,103	\$ 104,440			2006	
This program will be closed in 2022 due to the new SW Higher Education institutional partnership launching in 2022.	Core	Local	PUB-UC/CSU/IOU Partnership		-	-	-		\$ 308,179	\$ 137,088			2004	

**Programs to be closed upon completion of commitments**

PA Justification	Third Party Implementer or Core	Statewide or Local	Programs to be Closed with the Disposition of 2022-2023 ABAL	% change	2020 Claimed TRC	2021 (Q2) Claimed TRC	2022 Filed TRC	2023 Filed TRC	2021 Budget	2022 Budget	2023 Budget	Year Program Started	For existing third party implemented programs, MM/YY Program was due to sunset prior to PY 2022-2023 ABAL planning and new 3P contracting	For existing third party implemented programs, MM/YY Program is extended to as a result of PY 2022-2023 ABAL planning and timing for new 3P contracts' ramp up
This program will be closed once remaining committed funding commitments are complete. Program has seen little participation.	Third party	Local	COM-AB793-CEMTL Program		0.31	-	-		\$ 3,000	\$ -		2017	Dec-20	
This program will be closed once remaining committed funding commitments are complete in 2022. Program has seen little participation.	Third party	Local	RES-AB793-REMTS Program		-	-	0.40		\$ 828,707	\$ 828,705		2019	Dec-22	
This program will be closed once remaining committed funding commitments are complete in 2022. Program will be retired for new third party industrial programs which are currently in the solicitation process.	Third party	Local	IND-Small Industrial Facility Upgrades		1.05	-	5.54		\$ 799,264	\$ 610,242		2010	Dec-21	Dec-22

**Programs with reduced budgets (>40% budget decrease), to continue in 2022 or 2023**

PA Justification	Third party implementer or Core	Statewide	Programs with reduced budgets (>40% budget decrease)	% change	2020 Claimed TRC	2021 (Q2) Claimed TRC	2022 Filed TRC	2023 Filed TRC	2021 Budget	2022 Budget	2023 Budget	Year program started	For existing third party implemented programs, MM/YY Program was due to sunset prior to PY 2022-2023 ABAL planning and new 3P contracting	For existing third party implemented programs, MM/YY Program is extended to as a result of PY 2022-2023 ABAL planning and timing for new 3P contracts ramp up, or mark "NEW 3P" program if program is result of 3P solicitation process per 01801004.
Delayed program solicitation process and program launch led to decrease program budget in 2022.	Third party	Statewide	RES-SW-New Construction-Mixed Fuel	-64%	-	-	1.55	2.24	\$ 442,411	\$ 158,492	\$ 212,807	2021	NEW 3P	NEW 3P
Program will be utilized solely to complete existing commitments. No new projects will be accepted due to launch of new SW nonresidential new construction program.	Core	Local	COM-Savings By Design	-44%	0.04	-	-	-	\$ 578,000	\$ 323,000	\$ 218,000	2003		
Delayed program solicitation process and program launch led to decrease program budget in 2022.	Third party	Statewide	SW-NonRes New Construction Mixed Fuel	-51%	-	-	1.14	1.44	\$ 167,200	\$ 82,220	\$ 731,240	2020	NEW 3P	NEW 3P
Partnership will close once the new SW Higher Education institutional partnership launches in 2022.	Core	Local	PUB-California Community College Partnership	-57%	-	-	-		\$ 240,103	\$ 104,440	\$ -	2006		
Partnership will close once the new SW Higher Education institutional partnership launches in 2022.	Core	Local	PUB-UC/CSU/IOU Partnership	-56%	-	-	-		\$ 308,179	\$ 137,088	\$ -	2004		
An increased share of the SW C&S budget will be allocated to Federal Codes Advocacy and away from Appliance Standards Advocacy.	Third party	Statewide	C&S-SW-Appliance Standards Advocacy	-54%	202.61	213.46	462.57	513.65	\$ 331,024	\$ 152,772	\$ 152,772	2020	NEW 3P	NEW 3P
New local industrial third-party programs will launch and this existing program will ramp down. The decreased budget reflects this transition while funding remaining projects.	Third party	Local	IND-SEM	-44%	2.61	-	2.76	3.38	\$ 2,032,000	\$ 1,530,497	\$ 850,757	2019		

**Programs with enhanced budgets (>40% budget increase)**

PA Justification	Third party implementer or Core	Statewide	Programs with enhanced budgets (>40% budget increase)	% change	2020 Claimed TRC	2021 (Q2) Claimed TRC	2022 Filed TRC	2023 Filed TRC	2021 Budget	2022 Budget	2023 Budget	Year program started	For existing third party implemented programs, MM/YY Program is extended to as a result of PY 2022-2023 ABAL planning and new 3P contracting	For existing third party implemented programs, MM/YY Program is extended to as a result of PY 2022-2023 ABAL planning and new 3P contracts ramp up, or mark "NEW 3P" program if program is result of 3P solicitation process per D1801004.
Program budget increase due to continued success of downstream rebates, evolving marketing partnership with retailers, and anticipated increase in participation. Additionally, program will offer Solar Hot Water rebates in the residential sector and other new rebates in 2022 and 2023 in addition to existing measures.	Core	Local	RES-Residential Energy Efficiency Program	43%	0.37	0.46	0.56	0.58	\$ 11,655,724	\$ 16,711,309	\$ 16,767,864	2013		
Program has continued to see a steady increase in participation since 2021. The program has Multifamily property owners and managers expecting to onboard and complete a significant number of projects in 2022. Additionally, the requested budget would fund expected participation through partnership with Project Homekey and for multi-family properties that do not qualify for the Energy Savings Assistance program.	Core	Local	RES-Home Upgrade Program	139%	0.18	0.51	0.64	0.65	\$ 2,193,000	\$ 5,244,993	\$ 6,017,996	2013		NEW 3P
Program is increasing its budget to cover more territory in the disadvantage and hard-to-reach areas. Also, additional measures will be installed to increase its penetration with the various communities including increasing direct installations of water heaters to hard-to-reach customers and disadvantaged communities in 2022 and 2023.	Third party	Local	RES-Community Language Efficiency Outreach-Direct Install	184%	-	0.20	0.27	0.29	\$ 1,166,123	\$ 3,316,158	\$ 3,316,158	2020	NEW 3P	NEW 3P
Portfolio Administrator costs for SW program to increase as SW program implementation ramps up into 2022.	Core	Statewide	RES-SW-New Construction-Mixed Fuel-PA	92%	-	-	-	-	\$ 22,120	\$ 42,500	\$ 48,000	2021	NEW 3P	NEW 3P
SW program budget increases as implementation of SW program ramps up into 2022.	Third party	Statewide	RES-SW-Plug Load and Appliance	103%	-	-	0.86	1.14	\$ 606,100	\$ 1,231,846	\$ 1,275,873	2021	NEW 3P	NEW 3P
Portfolio Administrator costs for SW program to increase as SW program implementation ramps up into 2022.	Core	Statewide	RES-SW-Plug Load and Appliance-PA	102%	-	-	-	-	\$ 9,901	\$ 20,000	\$ 23,000	2021	NEW 3P	NEW 3P
Portfolio Administrator costs for SW program to increase as SW program implementation ramps up into 2022.	Core	Statewide	COM-SW-Point of Sale Food Service-PA	61%	-	-	-	-	\$ 216,787	\$ 349,768	\$ 361,868	2021	NEW 3P	NEW 3P
Portfolio Administrator costs for SW program to increase as SW program implementation ramps up into 2022.	Core	Statewide	COM-SW-Midstream Commercial Water Heating-PA	62%	-	-	-	-	\$ 202,845	\$ 329,239	\$ 341,942	2021	NEW 3P	NEW 3P
Budget increase due to introduction and fiscal management of existing and new Regional Energy Networks.	Core	Local	PUB-REN Fiscal Management & Coordination	52%	-	-	-	-	\$ 453,000	\$ 687,931	\$ 711,722	2013		
SW program budget increases as implementation of SW program ramps up into 2022.	Third party	Statewide	PUB-SW-Institutional Partnership: DGS & DoC	258%	-	-	0.27	1.02	\$ 34,833	\$ 124,593	\$ 353,654	2021	NEW 3P	NEW 3P
Portfolio Administrator costs for SW program to increase as SW program implementation ramps up into 2022.	Third party	Statewide	PUB-SW-Institutional Partnerships: DGS & DoC-PA	733%	-	-	-	-	\$ 1,741	\$ 14,500	\$ 17,500	2021	NEW 3P	NEW 3P
Portfolio Administrator costs for SW program to increase as SW program implementation ramps up into 2022.	Core	Statewide	ET-SW-Emerging Technologies, Gas-PA	2777%	-	-	-	-	\$ 10,800	\$ 310,738	\$ 320,933	2021	NEW 3P	NEW 3P
An increased share of the SW C&S budget will be allocated to Federal Codes Advocacy and away from Appliance Standards Advocacy.	Third party	Statewide	C&S-SW-Federal Codes Advocacy	49%	1.57	1.76	1.77	1.74	\$ 298,509	\$ 445,518	\$ 445,518	2020	NEW 3P	NEW 3P
Program will offer more workforce, education, and training classes with increased budget. Allow for more attendees and bring back classes that were cut before.	Third party	Local	WE&T-HERS Rater Training Advancement	65%	-	-	-	-	\$ 308,000	\$ 508,000	\$ 508,000	2010	Dec-21	Dec-22
SW program budget increases as implementation of SW program ramps up into 2022.	Third party	Statewide	WE&T-SW-WE&T Career and Workforce Readiness	42%	-	-	-	-	\$ 103,023	\$ 146,806	\$ 158,112	2021	NEW 3P	NEW 3P
Portfolio Administrator costs for SW program to increase as SW program implementation ramps up into 2022.	Core	Statewide	WE&T-SW-WE&T Career and Workforce Readiness-PA	181%	-	-	-	-	\$ 5,151	\$ 14,500	\$ 17,500	2021	NEW 3P	NEW 3P
SW program budget increases as implementation of SW program ramps up into 2022.	Third party	Statewide	WE&T-SW-WE&T Career Connections	71%	-	-	-	-	\$ 48,767	\$ 83,600	\$ 83,600	2021	NEW 3P	NEW 3P
Portfolio Administrator costs for SW program to increase as SW program implementation ramps up into 2022.	Core	Statewide	WE&T-SW-WE&T Career Connections-PA	495%	-	-	-	-	\$ 2,439	\$ 14,500	\$ 17,500	2021	NEW 3P	NEW 3P
Budget increase as a result of program implementation ramp up into 2023 for custom measures and increased participation.	Third party	Local	RES-Multi-Family Energy Alliance	46%	-	-	0.43	0.46	\$ 2,033,619	\$ 2,977,855		2021	NEW 3P	NEW 3P
SW program budget increases as implementation of SW program ramps up into 2023.	Third party	Statewide	SW-NonRes New Construction Mixed Fuel	789%	-	-	1.14	1.44	\$ 82,220	\$ 731,240		2020	NEW 3P	NEW 3P
SW program budget increases as implementation of SW program ramps up into 2023.	Third party	Statewide	PUB-SW-Institutional Partnership: DGS & DoC	184%	-	-	0.27	1.02	\$ 124,593	\$ 353,654		2021	NEW 3P	NEW 3P
SW program budget increases as implementation of SW program ramps up into 2023.	Third party	Statewide	PUB-SW-Institutional Partnership: UC/CSU/CCC	209%	-	-	1.25	1.25	\$ 166,259	\$ 512,913		2022	NEW 3P	NEW 3P
SW program budget increases as implementation of SW program ramps up into 2023.	Third party	Statewide	PUB-SW-Water/Wastewater Pumping	209%	-	-	1.25	1.25	\$ 166,259	\$ 512,913		2022	NEW 3P	NEW 3P
Budget increase as a result of program implementation ramp up into 2023. Contracts through solicitation process are expected to be signed middle of 2022.	Third party	Local	IND-Solicitation	84%	-	-	1.62	1.76	\$ 6,600,000	\$ 12,130,000		2022	NEW 3P	NEW 3P
SW program budget increases as implementation of SW program ramps up into 2023.	Third party	Statewide	ET-SW-Emerging Technologies, Gas	111%	-	-	-	-	\$ 858,569	\$ 1,814,026		2022	NEW 3P	NEW 3P
Budget increase due to re-introduce of Innovative Designs for Energy Efficiency Activities (IDEEA365) for on-going, rolling solicitations for innovative ideas and technologies. Competitive solicitations are set to launch in 2022 for implementation of ideas in 2023.	Third party	Local	SOL-IDEEA365	155%	-	-	-	-	\$ 1,080,000	\$ 2,750,000		2013	NEW 3P	NEW 3P

Programs that are new in 2022 or 2023

PA Justification	Third party implementer or Core	Statewide	Programs that are new in 2022 or 2023	2022 Filed TRC	2023 Filed TRC	2021 Budget	2022 Budget	2023 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 2022-2023 ABAL planning and timing for new 3P contracts ramp up, or mark "NEW 3P" program if 3P solicitation process per D1801004
Placeholder program for new energy efficiency programs currently in the solicitation process.	Third party	Local	PUB-Large EE Solicitation	1.45	1.52		\$ 1,750,000	\$ 1,750,000	Jun-22	NEW 3P	NEW 3P
New Regional Energy Pathways program to support to support Public Sector customers.	Core	Local	PUB-Regional Energy Pathways	-	-		\$ 1,932,904	\$ 2,051,023	Jan-22		
Placeholder program for new energy efficiency programs currently in the solicitation process.	Third party	Local	COM-Behavioral Program	0.49	0.74		\$ 1,200,000	\$ 1,100,000	Jun-22	NEW 3P	NEW 3P
Placeholder program for new energy efficiency programs currently in the solicitation process.	Third party	Local	IND-Industrial Solicitation	1.62	1.76		\$ 6,600,000	\$ 12,130,000	Jun-22	NEW 3P	NEW 3P
Placeholder program for new energy efficiency programs currently in the solicitation process.	Third party	Local	CC-Outreach Solicitation	-	-		\$ 1,050,000	\$ 1,050,000	Aug-22	NEW 3P	NEW 3P
Program for new statewide energy efficiency program to be launched in 2023.	Third party	Statewide	RES-SW-QI/QM	-	-		\$ -	\$ 576,840	Aug-22	NEW 3P	NEW 3P
Program for portfolio administrator cost for new statewide energy efficiency program to be launched in 2023.	Core	Statewide	RES-SW-QI/QM-PA	-	-		\$ -	\$ 20,000	Aug-22	NEW 3P	NEW 3P
Program for new statewide energy efficiency program currently in the solicitation process.	Third party	Statewide	PUB-SW-Institutional Partnership: UC/CSU/CCC	1.25	1.25		\$ 166,259	\$ 512,913	Feb-22	NEW 3P	NEW 3P
Program for portfolio administrator cost for new statewide energy efficiency program currently in the solicitation process.	Core	Statewide	PUB-SW-Institutional Partnership: UC/CSU/CCC-PA	-	-		\$ 15,000	\$ 18,000	Feb-22	NEW 3P	NEW 3P
Program for new statewide energy efficiency program currently in the solicitation process.	Third party	Statewide	PUB-SW-Water/Wastewater Pumping	1.25	1.25		\$ 166,259	\$ 512,913	Apr-22	NEW 3P	NEW 3P
Program for portfolio administrator cost for new statewide energy efficiency program currently in the solicitation process.	Core	Statewide	PUB-SW-Water/Wastewater Pumping-PA	-	-		\$ 15,000	\$ 18,000	Apr-22	NEW 3P	NEW 3P



**Pa Name:** Southern California Gas Company  
**Budget Year:** 2022-2023

**Table 5 - Committed Energy Efficiency Program Funding - Funds Not Yet Spent as of 7/31/2021**

<b>Accrued funds not yet spent</b>	<b>Electric Procurement Funds</b>	<b>Natural Gas Public Purpose Funds</b>	<b>Total</b>
<b>Category</b>			
2017 to date EM&V Funds	\$0	\$2,036,538	\$2,036,538
2017 to date Program Funds - Utility	\$0	\$8,461,691	\$8,461,691
2017 to date Program Funds - REN	\$0	\$0	\$0
2017 to date Program Funds - CCA	\$0	\$0	\$0
2018 to date EM&V Funds	\$0	\$530,840	\$530,840
2018 to date Program Funds - Utility	\$0	\$1,525,098	\$1,525,098
2018 to date Program Funds - REN	\$0	\$0	\$0
2018 to date Program Funds - CCA	\$0	\$0	\$0
2019 to date EM&V Funds	\$0	\$0	\$0
2019 to date Program Funds - Utility	\$0	\$420,497	\$420,497
2019 to date Program Funds - REN	\$0	\$0	\$0
2019 to date Program Funds - CCA	\$0	\$0	\$0
2020 to date EM&V Funds	\$0	\$651,613	\$651,613
2020 to date Program Funds - Utility	\$0	\$7,864,032	\$7,864,032
2020 to date Program Funds - REN	\$0	\$0	\$0
2020 to date Program Funds - CCA	\$0	\$0	\$0
2021 to date EM&V Funds	\$0	\$1,007,334	\$1,007,334
2021 to date Program Funds - Utility	\$0	\$60,421,011	\$60,421,011
2021 to date Program Funds - REN	\$0	\$0	\$0
2021 to date Program Funds - CCA	\$0	\$0	\$0



AMENDED

Line	Sector	Program Year (PY) 2022 Budget	FORECAST ENERGY SAVINGS (Net)					Program Year (PY) 2023 Budget	FORECAST ENERGY SAVINGS (Net)				
			PA forecast kWh	PA forecast kW	PA forecast Therms	PA forecast Elec CO2	PA forecast GasCO2		PA forecast kWh	PA forecast kW	PA forecast Therms	PA forecast Elec CO2	PA forecast GasCO2
<b>Resource Acquisition Program Segment</b>													
	Residential	\$29,677,596	1,534,809	328	13,818,144	373	80,836	\$29,593,709	1,827,119	384	14,036,252	461	82,112
	Commercial	\$29,514,570	10,312,923	2,308	4,193,778	2,550	24,568	\$29,975,470	13,670,210	2,905	4,547,389	3,539	26,645
	Industrial	\$15,522,099	9,463	2	4,330,847	2	25,335	\$17,634,787	9,463	2	4,421,970	2	25,869
	Agriculture	\$5,256,072	49,041	2	828,845	11	4,849	\$5,616,473	59,788	2	788,339	15	4,612
	Emerging Tech	\$0	-	-	-	-	-	\$0	-	-	-	-	-
	Public	\$8,025,909	400,944	92	2,229,222	94	13,041	\$8,190,350	1,718,521	458	2,085,078	434	12,198
	WE&T	\$0	-	-	-	-	-	\$0	-	-	-	-	-
	Finance	\$0	-	-	-	-	-	\$0	-	-	-	-	-
	OBFL Loan Pool	\$0	-	-	-	-	-	\$0	-	-	-	-	-
4	<b>PA Subtotal (does not include ESA budget and savings)</b>	<b>\$87,996,247</b>	<b>12,307,179</b>	<b>2,732</b>	<b>25,400,836</b>	<b>3,031</b>	<b>148,629</b>	<b>\$91,010,789</b>	<b>17,280,102</b>	<b>3,751</b>	<b>25,879,028</b>	<b>4,451</b>	<b>151,435</b>
	Resource Acquisition Forecasted Total System Benefit (TSB)	\$148,739,535						\$160,520,337					
	Resource Acquisition Forecasted Total Resource Cost (TRC)	1.20						1.26					
	Resource Acquisition Forecasted Portfolio Administrator Cost (PAC)	1.71						1.81					
<b>Market Support Program Segment</b>													
	Residential	\$3,780,076	573,475	6	988	(10)	128	\$4,643,164	1,396,623	77	13,335	45	321
	Commercial	\$489,345	43,365	11	924	7	9	\$1,037,445	571,909	142	12,188	89	117
	Industrial	\$371,404	30,889	5	2,182	8	13	\$925,718	407,380	63	28,781	105	168
	Agriculture	\$288,895	5,509	2	42	1	0	\$681,533	72,655	23	557	19	3
	Emerging Tech	\$1,169,307	-	-	-	-	-	\$2,134,959	-	-	-	-	-
	Public	\$3,275,606	8,246	4	160	2	1	\$3,575,523	108,742	56	2,108	28	12
	WE&T	\$4,856,100	-	-	-	-	-	\$4,959,100	-	-	-	-	-
	Finance	\$650,000	-	-	-	-	-	\$650,000	-	-	-	-	-
	OBFL Loan Pool	\$0	-	-	-	-	-	\$0	-	-	-	-	-
4	<b>PA Subtotal (does not include ESA budget and savings)</b>	<b>\$14,880,733</b>	<b>661,484</b>	<b>27</b>	<b>4,297</b>	<b>8</b>	<b>151</b>	<b>\$18,607,442</b>	<b>2,557,309</b>	<b>362</b>	<b>56,969</b>	<b>285</b>	<b>622</b>
	Market Support Forecasted Total System Benefit (TSB)	\$380,794						\$2,973,490					
	Market Support Forecasted Total Resource Cost (TRC)	0.03						0.15					
	Market Support Forecasted Portfolio Administrator Cost (PAC)	0.03						0.16					
<b>Equity Program Segment</b>													
	Residential	\$15,041,462	520,458	529	720,928	139	4,217	\$15,814,465	520,458	529	749,941	153	4,387
	Commercial	\$420,000	-	-	-	-	-	\$420,000	-	-	-	-	-
	Industrial	\$0	-	-	-	-	-	\$0	-	-	-	-	-
	Agriculture	\$0	-	-	-	-	-	\$0	-	-	-	-	-
	Emerging Tech	\$0	-	-	-	-	-	\$0	-	-	-	-	-
	Public	\$0	-	-	-	-	-	\$0	-	-	-	-	-
	WE&T	\$161,306	-	-	-	-	-	\$175,612	-	-	-	-	-
	Finance	\$0	-	-	-	-	-	\$0	-	-	-	-	-
	OBFL Loan Pool	\$0	-	-	-	-	-	\$0	-	-	-	-	-
4	<b>PA Subtotal (does not include ESA budget and savings)</b>	<b>\$15,622,768</b>	<b>520,458</b>	<b>529</b>	<b>720,928</b>	<b>139</b>	<b>4,217</b>	<b>\$16,410,077</b>	<b>520,458</b>	<b>529</b>	<b>749,941</b>	<b>153</b>	<b>4,387</b>
	Equity Program Forecasted Total System Benefit (TSB)	\$10,248,199						\$11,319,679					
	Equity Program Forecasted Total Resource Cost (TRC)	0.56						0.59					
	Equity Program Forecasted Portfolio Administrator Cost (PAC)	0.68						0.72					
<b>Portfolio</b>													
	Residential	\$48,499,134	2,628,742	863	14,540,060	503	85,182	\$50,051,338	3,739,201	990	14,799,528	659	86,821
	Commercial	\$30,423,915	10,356,288	2,319	4,194,702	2,557	24,577	\$31,432,915	14,242,120	3,048	4,559,577	3,628	26,762
	Industrial	\$15,893,503	40,352	7	4,333,029	10	25,348	\$18,560,505	416,843	65	4,450,751	107	26,037
	Agriculture	\$5,544,967	54,550	4	828,887	13	4,849	\$6,298,006	132,443	25	788,896	34	4,615
	Emerging Tech	\$1,169,307	-	-	-	-	-	\$2,134,959	-	-	-	-	-
	Public	\$11,301,515	409,190	96	2,229,382	96	13,042	\$11,765,873	1,827,263	514	2,087,185	462	12,210
	WE&T	\$5,017,406	-	-	-	-	-	\$5,134,712	-	-	-	-	-
	Finance	\$650,000	-	-	-	-	-	\$650,000	-	-	-	-	-
	OBFL Loan Pool	\$0	-	-	-	-	-	\$0	-	-	-	-	-
4	<b>PA Subtotal (does not include ESA budget and savings)</b>	<b>\$118,499,748</b>	<b>13,489,121</b>	<b>3,288</b>	<b>26,126,061</b>	<b>3,179</b>	<b>152,997</b>	<b>\$126,028,308</b>	<b>20,357,869</b>	<b>4,642</b>	<b>26,685,938</b>	<b>4,890</b>	<b>156,444</b>
	CPUC Savings Goal (w/o C&S)				19,000,000						21,000,000		
	Forecast savings as % of CPUC Savings Goal (w/o C&S)				138%						127%		
7	Total EM&V <sup>7</sup>	\$5,245,679						\$5,568,216					
7a	PA EM&V	\$1,370,480						\$1,456,755					
7b	ED EM&V	\$3,875,199						\$4,111,461					
	Portfolio Forecasted Total System Benefit (TSB)	\$159,368,525						\$174,813,505					
	Portfolio Forecasted Total Resource Cost - TRC (w/o C&S and w/ EM&V)	0.98						0.99					
	Portfolio Forecasted Portfolio Administrator Cost (PAC)	1.26						1.31					
	Portfolio Forecasted Ratepayer Impact Measure (RIM)	1.21						1.24					
8	Codes & Standards	\$1,105,758			17,598,838	-	102,953	\$1,106,658			20,865,618	-	122,064
9	PA Spending Budget Request <sup>8</sup>	\$124,851,185						\$132,703,182					
10	(LESS) PA Pre-2020 Uncommitted and Unspent Carryover Balance <sup>9</sup>	\$0						\$0					
11	CEC AB 841 Program Funding <sup>1</sup>	\$0						\$0					
12	Applicable percentage (70%) of difference between funding limitation and 2020 budget	\$0						\$0					
13	PA 2020 and Beyond Uncommitted and Unspent Carryover Balance <sup>4</sup>	\$382,120						\$0					
14	CEC AB 841 Total Program Funding	\$382,120						\$0					
15	PA Revenue Requirement Request (Cost Recovery) <sup>5</sup>	\$124,851,185						\$132,703,182					
	% of Equity and Market Support Program Budgets to PA Spending Budget Request (not to Exceed 30%)	24%						26%					
16	PA Authorized Budget Cap (D.18-05-041)	\$108,356,000						\$110,548,000					
<b>For CCA &amp; RENS in IOU Service Territory Only--(IOU PA Only to complete)</b>													
21	REN Budget Recovery Request	\$9,776,370						\$9,071,330					
21a	BaVREN PY Budget Recovery Request (excl. REN Uncommitted/Unspent Carryover)	\$0						\$0					
21b	SoCal REN PY Budget Recovery Request (excl. REN Uncommitted/Unspent Carryover)	\$4,622,803						\$4,317,173					
21c	3CREN PY Budget Recovery Request (excl. REN Uncommitted/Unspent Carryover)	\$1,878,759						\$2,462,709					
21d	RCEA PY Budget Recovery Request (excl. REN Uncommitted/Unspent Carryover)	\$0						\$0					
21e	I-REN PY Budget Recovery Request (excl. REN Uncommitted/Unspent Carryover)	\$2,274,817						\$2,291,448					
22	CCA Budget Recovery Request	\$0						\$0					
22a	MCE PY Budget Recovery Request (excl. REN Uncommitted/Unspent Carryover)	\$0						\$0					
22b	Lancaster PY Budget Recovery Request (excl. REN Uncommitted/Unspent Carryover)	\$0						\$0					
	Redwood Coast Energy Authority (excl. REN Uncommitted/Unspent Carryover)	\$0						\$0					
	San Jose Clean Energy (excl. REN Uncommitted/Unspent Carryover)	\$0						\$0					
17	<b>Total PA (IOU+CCAs+RENS) Recovery Budget<sup>6</sup></b>	<b>\$193,627,561</b>						<b>\$141,774,511</b>					

<sup>1</sup> This is the IOU's requested EE Portfolio budget. This is the budget by which the Statewide Program compliance budget requirement of 25% will be measured.  
<sup>2</sup> The balance of unspent uncommitted must reflect the total unspent uncommitted from pre-2020 EE authorized budgets Jan 1 2018 through Dec 31 of current year (PY-1). Because each ABAL is typically filed in Q3, this unspent uncommitted amount will be an estimate for the year in which the ABAL is filed. In recognition of the Proposed Decision for Energy Efficiency Actions to Enhance Summer 2022 and 2023 Electric Reliability, SoCalGas has input zero for its unspent and uncommitted funds carryover balance. SoCalGas intends to reserve its balance of unspent and uncommitted funds for 2022 and 2023 reliability.  
<sup>3</sup> See D.21-01-004 Tables 2 (2022) and 3 (2023)  
<sup>4</sup> Because each ABAL is filed in Q3, this unspent uncommitted amount will be an estimate for the year in which the ABAL is filed.  
<sup>5</sup> The amount of funds to be collected (cost recovery) for the PA EE Program Year = Line 9 - Line 10 + Line 12  
<sup>6</sup> Total amount to be requested in IOU's PPP advice letter for their programs, RENS and CCAs in their service territory, Line 15+ Line 21 + Line 22. Budget includes Inland Regional Energy Network (I-REN).  
<sup>7</sup> For IOUs, EM&V costs only includes IOU's Total EM&V budget (PA + ED) and does not include REN or CCAs EM&V budget. For RENS & CCAs, include EM&V-PA Budget and EM&V-ED = \$0.

AMENDED

Line	Budget Category	2022 Energy Efficiency Cap And Target Expenditure Projections						2023 Energy Efficiency Cap And Target Expenditure Projections					
		Expenditures			Cap & Target Performance			Expenditures			Cap & Target Performance		
		Non-Third Party Qualifying Costs (including PA costs and old-definition 3P/IGP contracts that don't meet the new definition)	Third Party Qualifying Costs <sup>2</sup> (Local SW, CEC & AB 841)	Total Portfolio	Percent of Budget <sup>4</sup>	Cap %	Target %	Non-Third Party Qualifying Costs (including PA costs and old-definition 3P/IGP contracts that don't meet the new definition)	Third Party Qualifying Costs <sup>2</sup> (including SW)	Total Portfolio	Percent of Budget <sup>4</sup>	Cap %	Target %
1	Administrative Costs												
2	PA <sup>1</sup>	\$ 3,397,981		\$ 3,397,981	2.7%	10.0%	\$ 3,103,081		\$ 3,103,081	2.3%	10.0%		
3	Non-PA Third Party & Partnership <sup>2</sup>	\$ -	\$ 3,092,723	\$ 3,092,723	2.5%	10.0%	\$ -	\$ 4,195,070	\$ 4,195,070	3.2%	10.0%		
4	PA & Non-PA Target Exempt Programs <sup>3</sup>	\$ 1,468,434	\$ 156,622	\$ 1,625,056			\$ 1,351,714	\$ 249,652	\$ 1,601,366				
5	Marketing and Outreach Costs <sup>4</sup>												
6	Marketing & Outreach	\$ 3,127,282	\$ 2,362,360	\$ 5,489,642	4.4%	6.0%	\$ 2,951,000	\$ 2,958,476	\$ 5,909,476	4.5%	6.0%		
7	Statewide Marketing & Outreach <sup>5</sup>	\$ -		\$ -			\$ -		\$ -				
8	Direct Implementation Costs												
9	Direct Implementation (Incentives and Rebates)	\$ 27,509,908	\$ 28,660,706	\$ 56,170,614			\$ 19,635,850	\$ 40,389,126	\$ 60,024,976				
10	Direct Implementation (Non Incentives and Non Rebates)	\$ 15,304,316	\$ 23,196,290	\$ 38,500,606	30.7%	20.0%	\$ 9,687,129	\$ 30,216,071	\$ 39,903,200	30.1%	20.0%		
11	Direct Implementation Target Exempt Programs (Non Incentives and Non Rebates) <sup>3</sup>	\$ 7,838,386	\$ 3,490,499	\$ 11,328,885			\$ 7,353,864	\$ 5,043,932	\$ 12,397,796				
12	EM&V Costs (PA and Energy Division) <sup>6,7</sup>	\$ 5,245,679		\$ 5,245,679	4.4%	4.0%	\$ 5,568,218		\$ 5,568,218	4.4%	4.0%		
12a	EM&V - PA	\$ 1,370,480		\$ 1,370,480			\$ 1,456,755		\$ 1,456,755				
12b	EM&V - ED	\$ 3,875,199		\$ 3,875,199			\$ 4,111,461		\$ 4,111,461				
13	Total Portfolio Budget (includes PA Program and EM&V Budget + SW ME&O) <sup>8</sup>	\$ 63,891,985	\$ 60,959,199	\$ 124,851,185			\$ 49,650,854	\$ 83,052,327	\$ 132,703,182				
14	CEC AB 841 (per CPUC Code Section 1613 counts as a Third Party Program as defined in D.18-08-019, OP 10)		\$ 382,120	\$ 382,120				\$ -	\$ -				
15	PA Spending Budget Request (PA Program and EM&V + CEC AB 841) <sup>9</sup>			\$ 125,233,305					\$ 132,703,182				
16	Total Third-Party Implementer Contracts + CEC AB 841 (as defined per D.16-08-019, OP 10 and D.21-01-004) 10, 11		\$ 61,341,319		49.0%	60.0%		\$ 83,052,327		62.6%	60.0%		

Notes:

- 10% cap requirement based on D. 09-09-047 is set for IOU only.
- New Third party program definition per D.16-08-019, OP 10. For Row 3 of this table, the "Third Party & Partnership" administrative costs under the "Non-Third Party Qualifying Costs" column are costs for programs that met the old Third Party definition prior to the transition to the new third party definition.
- Target Exempt Programs are Non-Resource Programs which include: Emerging Technologies, Workforce Education & Training, Strategic Energy Resources (SER) program, 3P Placeholder for Public LGPs, and Codes & Standards programs (excluding Building Codes Advocacy, Appliance Standards Advocacy and National Standards Advocacy).
- Statewide Marketing & Outreach (SW ME&O) is excluded from the Marketing and Outreach cost target calculation per D.13-12-038, at p. 82.
- Statewide ME&O budgets for October 2019 through 2021 were requested in Advice Letter 4098-G/5544-E and supplements, and are pending approval. The amount in Line 7 represents the portion allocated to EE.
- For IOUs, EM&V costs only includes IOU's Total EM&V budget (PA + ED) and includes REN EM&V-ED budgets. For RENs, include RENs EM&V-PA budget
- The EM&V percentage is greater than 4% because numerator includes REN's EMV-ED budgets but the denominator excludes REN's total budgets.
- As directed in the Energy Efficiency Policy Manual Version 5 July 2013, page 92, this total includes SW ME&O and excludes REN and CCA budgets and is the denominator used to calculate the IOU PA Admin, Marketing, and Direct Implementation Non-Incentives percentages.
- IOU PA's 2022 and 2023 Proposed Budget excludes SWME&O and includes CEC AB 841.
- IOU PA's percentage for Third-Party Implementer Contracts denominator is IOU PA Subtotal including EM&V, but excluding SWME&O, REN, and CCA. This is the Total in line 15 minus SWME&O in line 7.
- IOU's Third-Party Implementer Contracts (as defined per D.16-08-019, OP 10) includes third-party contract and incentive budgets and statewide qualifying contract and incentive budgets.
- Excluded are labor loaders not recovered through SCG's DSMBA, and those estimated GRC Loader costs are \$7,871,000 and \$8,023,000 for 2022 and 2023, respectively.

**Pa Name:**  
**Budget Year:**  
**FUNCTION DEFINITIONS**

Southern California Gas Company  
 2022-2023

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	

Pa Name:  
Budget Year:  
PORTFOLIO SUMMARY

Southern California Gas Company AMENDED  
2022-2023

Sector	2020 EE Portfolio Expenditures				2022 EE Portfolio Budget				2023 EE Portfolio Budget				2020 EE Portfolio Savings			2022 EE Portfolio Forecasted Savings			2023 EE Portfolio Forecasted Savings		
	Labor	Non-Labor (excl. Incentives)	Incentives	Total	Labor	Non-Labor (excl. Incentives)	Incentives	Total	Labor	Non-Labor (excl. Incentives)	Incentives	Total	KWH	KW	MOTHERMS	KWH	KW	MOTHERMS	KWH	KW	MOTHERMS
Residential	\$ 4,596,651	\$ 19,353,128	\$ 28,118,741	\$ 52,068,520	\$ 4,495,430	\$ 15,260,934	\$ 28,742,770	\$ 48,499,134	\$ 4,630,293	\$ 15,713,646	\$ 29,707,399	\$ 50,051,338	7,247,402	1,638	16	2,628,742	863	14,540,060	3,739,201	990	14,799,528
Commercial	\$ 3,504,646	\$ 8,061,912	\$ 6,688,931	\$ 18,255,489	\$ 3,837,613	\$ 13,639,248	\$ 12,947,054	\$ 30,423,915	\$ 3,952,741	\$ 13,923,327	\$ 13,556,847	\$ 31,432,915	106,227	13	7	10,356,288	2,319	4,194,702	14,242,120	3,048	4,559,577
Industrial	\$ 2,764,317	\$ 3,453,094	\$ 563,909	\$ 6,781,320	\$ 1,943,457	\$ 6,390,568	\$ 7,559,478	\$ 15,893,503	\$ 2,001,761	\$ 7,362,307	\$ 9,196,437	\$ 18,560,505	-	-	6	40,352	7	4,333,029	416,843	65	4,450,751
Agriculture	\$ 828,261	\$ 56,391	\$ 108,628	\$ 993,280	\$ 796,414	\$ 2,390,737	\$ 2,357,816	\$ 5,544,967	\$ 820,307	\$ 2,758,673	\$ 2,719,027	\$ 6,298,006	168,096	-	1	54,550	4	828,887	132,443	25	788,896
Public	\$ 2,352,680	\$ 1,541,084	\$ 1,249,153	\$ 5,142,917	\$ 2,021,030	\$ 4,716,990	\$ 4,563,495	\$ 11,301,515	\$ 2,081,661	\$ 4,838,945	\$ 4,845,267	\$ 11,765,873	-	-	1	409,190	96	2,229,382	1,827,263	514	2,087,185
Cross Cutting*	\$ 2,917,295	\$ 4,209,139	\$ -	\$ 7,126,434	\$ 2,958,455	\$ 4,984,016	\$ 0	\$ 7,942,471	\$ 3,047,208	\$ 5,979,121	\$ -	\$ 9,026,329	-	-	15	-	-	26,126,061	-	-	-
Total Sector Budget	\$ 16,963,850	\$ 36,674,748	\$ 36,729,362	\$ 90,367,960	\$ 16,052,399	\$ 47,382,493	\$ 56,170,614	\$ 119,605,505	\$ 16,533,971	\$ 50,576,019	\$ 60,024,976	\$ 127,134,966	7,521,725	1,651	45	13,489,121	3,288	52,252,121	20,357,869	4,642	26,685,938
EM&V-PA	\$ 234,590	\$ 137,277	\$ -	\$ 371,867	\$ 248,406	\$ 1,122,074	\$ -	\$ 1,370,480	\$ 255,858	\$ 1,200,897	\$ -	\$ 1,456,755	-	-	-	-	-	-	-	-	-
EM&V-ED	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 3,875,199	\$ -	\$ 3,875,199	\$ -	\$ 54,111,461	\$ -	\$ 54,111,461	-	-	-	-	-	-	-	-	-
OBF - Loan Pool**	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-	-	-	-	-	-	-	-	-
CEC AB8841	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 382,120	\$ -	\$ 382,120	\$ -	\$ -	\$ -	\$ -	-	-	-	-	-	-	-	-	-
PA Spending Budget Request (PA Program and EM&V + CEC AB 841)	\$ 17,198,440	\$ 36,812,025	\$ 36,729,362	\$ 90,739,827	\$ 16,300,805	\$ 52,761,886	\$ 56,170,614	\$ 125,233,304	\$ 16,789,829	\$ 55,888,377	\$ 60,024,976	\$ 132,703,182	7,521,725	1,651	45	13,489,121	3,288	52,252,121	20,357,869	4,642	26,685,938

\* Cross Cutting Sector includes Codes & Standards, Emerging Technologies, Workforce Education & Training, and On-Bill Financing.  
\*\* For SDGE and SCG the loan pool is not part of the authorized EE portfolio budget and is collected and tracked through a separate balancing account.

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.

Pa Name:  
 Budget Year:  
 PORTFOLIO STAFFING

Southern California Gas Company  
 2022-2023

Functional Group	2020 EE Portfolio FTE (1)	2022 EE Portfolio FTE (1)	2023 EE Portfolio FTE (1)
Policy, Strategy, and Regulatory Reporting Compliance	10.1	13.1	13.1
Program Management	80.4	71.9	71.9
Engineering Services	20.5	18.4	18.4
Customer Application/Rebate/Incentive Processing	16.2	11.5	11.5
Customer Project Inspections	3.1	2	2
Portfolio Analytics	0.7	2.5	2.5
EM&V	1.5	2.3	2.3
ME&O (Local)	11.2	8	8
Account Management / Sales	26.2	18.6	18.6
IT	1.7	6.2	6.2
Call Center	1.9	3	3
Total	173.5	157.5	157.5

Notes:  
 (1) FTE is equal to productive labor of 1677 hours 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.¶

RESIDENTIAL BUDGET DETAIL

Sector	Cost Element	Functional Group	2020 EE Portfolio Expenditures	2022 EE Portfolio Budget	2023 EE Portfolio Budget
Residential	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance	\$ 535,300	\$ 348,216	\$ 358,662
		Program Management	\$ 2,045,856	\$ 1,225,650	\$ 1,262,420
		Engineering services	\$ 318,979	\$ 486,123	\$ 500,707
		Customer Application/Rebate/Incentive Processing	\$ 1,119,542	\$ 1,086,019	\$ 1,118,600
		Customer Project Inspections	\$ 164,406	\$ 155,146	\$ 159,800
		Portfolio Analytics	\$ 45,264	\$ 60,334	\$ 62,144
		ME&O (Local)	\$ 260,456	\$ 189,622	\$ 195,311
		Account Management / Sales	\$ -	\$ 505,775	\$ 520,948
		IT	\$ -	\$ 128,254	\$ 132,101
		Call Center	\$ 106,848	\$ 310,291	\$ 319,600
	Labor Total		\$ 4,596,651	\$ 4,495,430	\$ 4,630,293
	Non-Labor	Third-Party Implementer (as defined per D.16-08-019, OP 10)	\$ 7,310,661	\$ 10,699,726	\$ 13,490,189
		Local/Government Partnerships Contracts	\$ -	\$ -	\$ -
		Other Contracts	\$ -	\$ -	\$ -
		Program Implementation	\$ 6,563,624	\$ 2,095,698	\$ 765,324
		Policy, Strategy, and Regulatory Reporting Compliance	\$ 5,056	\$ 2,000	\$ 2,000
		Program Management	\$ 3,919,643	\$ 1,284,371	\$ 327,957
		Engineering services	\$ 4,635	\$ 5,247	\$ 2,558
		Customer Application/Rebate/Incentive Processing	\$ 525,445	\$ 153,892	\$ 75,018
		Customer Project Inspections	\$ -	\$ -	\$ -
		Portfolio Analytics	\$ -	\$ -	\$ -
		ME&O (Local)	\$ 1,024,064	\$ 1,020,000	\$ 1,050,600
		Account Management / Sales	\$ -	\$ -	\$ -
		IT	\$ -	\$ -	\$ -
		Call Center	\$ -	\$ -	\$ -
		Facilities	\$ -	\$ -	\$ -
		Incentives--(PA-implemented and Other Contracts Program Implementation) Programs	\$ 25,038,175	\$ 17,225,459	\$ 12,950,150
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)	\$ 3,080,566	\$ 11,517,311	\$ 16,757,249
	Non-Labor Total		\$ 47,471,869	\$ 44,003,704	\$ 45,421,045
Residential Total			\$ 52,068,520	\$ 48,499,134	\$ 50,051,338
	Other (collected through GRC) (2)	Labor Overheads	\$ 2,216,125	\$ 2,336,619	\$ 2,381,742
			\$ -	\$ -	\$ -

Notes: (1) Labor costs are already loaded with V&S (vacation & sick) and Payroll Taxes  
 (2) Other costs are collected through GRC D.19-09-051

**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.”¶

¶

- → 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.9 Table.¶



Sector	Cost Element	Functional Group	2020 EE Portfolio Expenditures	2022 EE Portfolio Budget	2023 EE Portfolio Budget
Commercial	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance	\$ 407,287	\$ 225,823	\$ 232,598
		Program Management	\$ 1,290,525	\$ 1,503,879	\$ 1,548,995
		Engineering services	\$ 643,492	\$ 1,044,647	\$ 1,075,986
		Customer Application/Rebate/Incentive Processing	\$ 155,486	\$ 51,715	\$ 53,267
		Customer Project Inspections	\$ 47,411	\$ 25,858	\$ 26,633
		Portfolio Analytics	\$ -	\$ 43,096	\$ 44,389
		ME&O (Local)	\$ 168,868	\$ 137,907	\$ 142,044
		Account Management / Sales	\$ 780,398	\$ 701,258	\$ 722,296
		IT	\$ -	\$ 103,430	\$ 106,533
		Call Center	\$ 11,179	\$ -	\$ -
	Labor Total		\$ 3,504,646	\$ 3,837,613	\$ 3,952,741
	Non-Labor	Third-Party Implementer (as defined per D.16-08-019, OP 10)	\$ 3,446,494	\$ 10,730,269	\$ 12,122,203
		Local/Government Partnerships Contracts	\$ -	\$ -	\$ -
		Other Contracts	\$ -	\$ -	\$ -
		Program Implementation	\$ 408,690	\$ 192,646	\$ 119,280
		Policy, Strategy, and Regulatory Reporting Compliance	\$ -	\$ 2,000	\$ 2,000
		Program Management	\$ 3,487,639	\$ 1,203,991	\$ 459,317
		Engineering services	\$ 25,336	\$ 503,428	\$ 311,702
		Customer Application/Rebate/Incentive Processing	\$ 5,243	\$ 311,914	\$ 193,125
		Customer Project Inspections	\$ -	\$ -	\$ -
		Portfolio Analytics	\$ -	\$ -	\$ -
		ME&O (Local)	\$ 679,806	\$ 690,000	\$ 710,700
		Account Management / Sales	\$ 8,704	\$ 5,000	\$ 5,000
		IT	\$ -	\$ -	\$ -
		Call Center	\$ -	\$ -	\$ -
		Facilities	\$ -	\$ -	\$ -
		Incentives--(PA-implemented and Other Contracts Program Implementation) Programs	\$ 5,712,977	\$ 4,177,134	\$ 3,177,135
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)	\$ 975,954	\$ 8,769,920	\$ 10,379,712
	Non-Labor Total		\$ 14,750,843	\$ 26,586,302	\$ 27,480,174
Commercial Total	Other (collected through GRC) (2)	Labor Overheads	\$ 18,255,489	\$ 30,423,915	\$ 31,432,915
			\$ 1,659,037	\$ 1,538,361	\$ 1,568,069
			\$ -	\$ -	\$ -

Notes: (1) Labor costs are already loaded with V&S (vacation & sick) and Payroll Taxes  
 (2) Other costs are collected through GRC D.19-09-051

**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.”

- → 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.9 Table.

INDUSTRIAL BUDGET DETAIL

Sector	Cost Element	Functional Group	2020 EE Portfolio Expenditures	2022 EE Portfolio Budget	2023 EE Portfolio Budget
Industrial	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance	\$ 99,329	\$ 225,823	\$ 232,598
		Program Management	\$ 476,538	\$ 626,789	\$ 645,592
		Engineering services	\$ 632,065	\$ 232,718	\$ 239,700
		Customer Application/Rebate/Incentive Processing	\$ 67,905	\$ 51,715	\$ 53,267
		Customer Project Inspections	\$ 10,853	\$ 25,858	\$ 26,633
		Portfolio Analytics	\$ -	\$ 43,096	\$ 44,389
		ME&O (Local)	\$ 169,715	\$ 103,430	\$ 106,533
		Account Management / Sales	\$ 1,300,443	\$ 530,598	\$ 546,516
		IT	\$ -	\$ 103,430	\$ 106,533
		Call Center	\$ 7,469	\$ -	\$ -
	Labor Total		\$ 2,764,317	\$ 1,943,457	\$ 2,001,761
	Non-Labor	Third-Party Implementer (as defined per D.16-08-019, OP 10)	\$ 2,914,329	\$ 3,139,975	\$ 6,030,393
		Local/Government Partnerships Contracts	\$ -	\$ -	\$ -
		Other Contracts	\$ -	\$ -	\$ -
		Program Implementation	\$ 5,646	\$ 153,010	\$ 62,695
		Policy, Strategy, and Regulatory Reporting Compliance	\$ 664	\$ 2,000	\$ 2,000
		Program Management	\$ 94,369	\$ 2,807,364	\$ 1,146,171
		Engineering services	\$ 5,516	\$ 198,483	\$ 81,327
		Customer Application/Rebate/Incentive Processing	\$ 564	\$ 84,736	\$ 34,721
		Customer Project Inspections	\$ -	\$ -	\$ -
		Portfolio Analytics	\$ -	\$ -	\$ -
		ME&O (Local)	\$ 425,294	\$ -	\$ -
		Account Management / Sales	\$ 6,712	\$ 5,000	\$ 5,000
		IT	\$ -	\$ -	\$ -
		Call Center	\$ -	\$ -	\$ -
		Facilities	\$ -	\$ -	\$ -
		Incentives--(PA-implemented and Other Contracts Program Implementation) Programs	\$ 561,292	\$ 3,701,605	\$ 1,702,855
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)	\$ 2,617	\$ 3,857,873	\$ 7,493,582
	Non-Labor Total		\$ 4,017,003	\$ 13,950,046	\$ 16,558,744
Industrial Total			\$ 6,781,320	\$ 15,893,503	\$ 18,560,505
	Other (collected through GRC) (2)	Labor Overheads	\$ 1,397,931	\$ 1,032,054	\$ 1,051,985
			\$ -	\$ -	\$ -

Notes: (1) Labor costs are already loaded with V&S (vacation & sick) and Payroll Taxes  
 (2) Other costs are collected through GRC D.19-09-051

**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.”

- → 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.9 Table.

Sector	Cost Element	Functional Group	2020 EE Portfolio Expenditures	2022 EE Portfolio Budget	2023 EE Portfolio Budget		
Agricultural	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance	\$ 30,852	\$ 103,430	\$ 106,533		
		Program Management	\$ 208,364	\$ 376,487	\$ 387,782		
		Engineering services	\$ 190,922	\$ 139,631	\$ 143,820		
		Customer Application/Rebate/Incentive Processing	\$ 38,811	\$ -	\$ -		
		Customer Project Inspections	\$ 8,671	\$ -	\$ -		
		Portfolio Analytics	\$ -	\$ 25,858	\$ 26,633		
		ME&O (Local)	\$ 96,446	\$ 51,715	\$ 53,267		
		Account Management / Sales	\$ 246,703	\$ 47,578	\$ 49,005		
		IT	\$ -	\$ 51,715	\$ 53,267		
		Call Center	\$ 7,492	\$ -	\$ -		
		<b>Labor Total</b>		<b>\$ 828,261</b>	<b>\$ 796,414</b>	<b>\$ 820,307</b>	
		Non-Labor		Third-Party Implementer (as defined per D.16-08-019, OP 10)	\$ 10,872	\$ 1,948,031	\$ 2,556,586
				Local/Government Partnerships Contracts	\$ -	\$ -	\$ -
				Other Contracts	\$ -	\$ -	\$ -
				Program Implementation	\$ -	\$ -	\$ -
				Policy, Strategy, and Regulatory Reporting Compliance	\$ -	\$ -	\$ -
				Program Management	\$ 10,945	\$ 336,843	\$ 151,044
				Engineering services	\$ 1,332	\$ 73,081	\$ 33,360
				Customer Application/Rebate/Incentive Processing	\$ 93	\$ 27,782	\$ 12,682
				Customer Project Inspections	\$ -	\$ -	\$ -
Portfolio Analytics	\$ -			\$ -	\$ -		
ME&O (Local)	\$ 2,057			\$ -	\$ -		
Account Management / Sales	\$ 31,092			\$ 5,000	\$ 5,000		
IT	\$ -			\$ -	\$ -		
Call Center	\$ -			\$ -	\$ -		
Facilities	\$ -			\$ -	\$ -		
Incentives--(PA-implemented and Other Contracts Program Implementation) Programs	\$ 108,628			\$ 718,570	\$ 568,570		
Incentives--Third Party Program (as defined per D.16-08-019, OP 10)	\$ -			\$ 1,639,246	\$ 2,150,457		
<b>Non-Labor Total</b>				<b>\$ 165,019</b>	<b>\$ 4,748,553</b>	<b>\$ 5,477,699</b>	
<b>Agricultural Total</b>				<b>\$ 993,280</b>	<b>\$ 5,544,967</b>	<b>\$ 6,298,006</b>	
Other (collected through GRC) (2)	Labor Overheads			\$ 409,132	\$ 355,006	\$ 361,862	
		\$ -	\$ -	\$ -			

Notes: (1) Labor costs are already loaded with V&S (vacation & sick) and Payroll Taxes  
 (2) Other costs are collected through GRC D.19-09-051

**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.”

- → 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.9 Table.

Sector	Cost Element	Functional Group	2020 EE Portfolio Expenditures	2022 EE Portfolio Budget	2023 EE Portfolio Budget
Public Sector	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance	\$ 100,081	\$ 225,823	\$ 232,598
		Program Management	\$ 1,744,564	\$ 1,278,400	\$ 1,316,752
		Engineering services	\$ 159,410	\$ -	\$ -
		Customer Application/Rebate/Incentive Processing	\$ 16,775	\$ -	\$ -
		Customer Project Inspections	\$ -	\$ -	\$ -
		Portfolio Analytics	\$ -	\$ 43,096	\$ 44,388
		ME&O (Local)	\$ 38,155	\$ 206,861	\$ 213,067
		Account Management / Sales	\$ 289,979	\$ 138,596	\$ 142,755
		IT	\$ -	\$ 128,254	\$ 132,101
		Call Center	\$ 3,716	\$ -	\$ -
	Labor Total		\$ 2,352,680	\$ 2,021,030	\$ 2,081,661
	Non-Labor	Third-Party Implementer (as defined per D.16-08-019, OP 10)	\$ 966,859	\$ 1,238,467	\$ 2,027,796
		Local/Government Partnerships Contracts	\$ 382,007	\$ 3,478,523	\$ 2,811,150
		Other Contracts	\$ -	\$ -	\$ -
		Program Implementation	\$ 52,037	\$ -	\$ -
		Policy, Strategy, and Regulatory Reporting Compliance	\$ 71,597	\$ -	\$ -
		Program Management	\$ -	\$ -	\$ -
		Engineering services	\$ 12,070	\$ -	\$ -
		Customer Application/Rebate/Incentive Processing	\$ 1,056	\$ -	\$ -
		Customer Project Inspections	\$ -	\$ -	\$ -
		Portfolio Analytics	\$ -	\$ -	\$ -
		ME&O (Local)	\$ 55,458	\$ -	\$ -
		Account Management / Sales	\$ -	\$ -	\$ -
		IT	\$ -	\$ -	\$ -
		Call Center	\$ -	\$ -	\$ -
		Facilities	\$ -	\$ -	\$ -
		Incentives--(PA-implemented and Other Contracts Program Implementation) Programs	\$ 161,524	\$ 1,687,140	\$ 1,237,140
		Incentives--Third Party Program (as defined per D.16-08-019, OP 10)	\$ 1,087,629	\$ 2,876,355	\$ 3,608,126
	Non-Labor Total		\$ 2,790,237	\$ 9,280,485	\$ 9,684,212
Public Sector Total			\$ 5,142,917	\$ 11,301,515	\$ 11,765,873
	Other (collected through GRC) (2)	Labor Overheads	\$ 1,185,235	\$ 1,102,549	\$ 1,123,840
			\$ -	\$ -	\$ -

Notes: (1) Labor costs are already loaded with V&S (vacation & sick) and Payroll Taxes  
 (2) Other costs are collected through GRC D.19-09-051

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.”

- → 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.9 Table.

Sector	Cost Element	Functional Group	2020 EE Portfolio Expenditures	2022 EE Portfolio Budget	2023 EE Portfolio Budget
Cross-Cutting	Labor(1)	Policy, Strategy, and Regulatory Reporting Compliance	\$ 2,257	\$ 225,823	\$ 232,598
		Program Management	\$ 2,540,876	\$ 2,425,444	\$ 2,498,206
		Engineering services	\$ 33,318	\$ -	\$ -
		Customer Application/Rebate/Incentive Processing	\$ -	\$ -	\$ -
		Customer Project Inspections	\$ -	\$ -	\$ -
		Portfolio Analytics	\$ 31,698	\$ 43,096	\$ 44,389
		ME&O (Local)	\$ 302,026	\$ 137,907	\$ 142,044
		Account Management / Sales	\$ -	\$ -	\$ -
		IT	\$ 7,120	\$ 126,185	\$ 129,971
		Call Center	\$ -	\$ -	\$ -
	Labor Total		\$ 2,917,295	\$ 2,958,455	\$ 3,047,208
	Non-Labor	Third-Party Implementer (as defined per D.16-08-019, OP 10)	\$ 2,318,972	\$ 2,646,734	\$ 3,613,495
		Local/Government Partnerships Contracts	\$ -	\$ -	\$ -
		Other Contracts	\$ -	\$ -	\$ -
		Program Implementation	\$ 535,791	\$ 748,779	\$ 757,862
		Policy, Strategy, and Regulatory Reporting Compliance	\$ -	\$ -	\$ -
		Program Management	\$ 1,097,300	\$ 1,408,503	\$ 1,423,864
		Engineering services	\$ 114	\$ -	\$ -
		Customer Application/Rebate/Incentive Processing	\$ -	\$ -	\$ -
		Customer Project Inspections	\$ -	\$ -	\$ -
		Portfolio Analytics	\$ -	\$ -	\$ -
		ME&O (Local)	\$ 9,951	\$ 130,000	\$ 133,900
		Account Management / Sales	\$ -	\$ -	\$ -
		IT	\$ 247,011	\$ 50,000	\$ 50,000
		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		\$ 4,209,139	\$ 4,984,016	\$ 5,979,121
Cross-Cutting Total			\$ 7,126,434	\$ 7,942,471	\$ 9,026,329
	Other (collected through GRC) (2)	Labor Overheads	\$ 1,519,122	\$ 1,506,411	\$ 1,535,502
			\$ -	\$ -	\$ -

Notes: (1) Labor costs are already loaded with V&S (vacation & sick) and Payroll Taxes  
 (2) Other costs are collected through GRC D.19-09-051

**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.”

- → 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.9 Table.





**ATTACHMENT B**  
**Advice No. 5898-A**

**Cedars Filing Submission Receipt**



## CEDARS FILING SUBMISSION RECEIPT

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

PA: Southern California Gas (SCG)

Budget Filing Year: 2022

Submitted: 22:06:10 on 05 Jan 2022

By: Tony Chun

Advice Letter Number: AL5898-A

### \* Portfolio Budget Filing Summary \*

- TRC: 1.56
- PAC: 3.14
- TRC (no admin): 2.2
- PAC (no admin): 7.64
- RIM: 3.02
- Budget: \$124,783,244.88
- TotalSystemBenefit: \$416,127,136.09
- ElecBen: \$9,906,438.57
- GasBen: \$391,960,573.85
- OtherBen: \$0.00
- TRCCost: \$257,896,934.35
- PACCost: \$127,954,786.62

### \* Programs Included in the Budget Filing \*

- SCG3701: RES-Energy Advisor
- SCG3702: RES-Residential Energy Efficiency Program
- SCG3705: RES-Home Upgrade Program
- SCG3707: RES-RNC
- SCG3714: IND-SEM
- SCG3729: WE&T-Integrated; Energy Efficiency Training
- SCG3735: FIN-On-Bill Financing
- SCG3739: PUB-California Community College Partnership
- SCG3740: PUB-UC/CSU/IOU Partnership
- SCG3757: IND-Small Industrial Facility Upgrades

- SCG3760: WE&T-HERS; Rater Training Advancement
- SCG3764: RES-LivingWise
- SCG3771: SOL-IDEEA365
- SCG3772: EM&V-Evaluation; Measurement & Verification
- SCG3810: RES-AB793-REMTS Program
- SCG3813: COM-Savings By Design
- SCG3823: RES-HVAC QI/QM
- SCG3824: RES-Behavioral Program
- 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
- SCG3861: RES-Community Language Efficiency Outreach-Direct Install
- SCG3882: COM-Small and Medium Commercial EE Program
- SCG3883: RES-Residential Advanced Clean Energy
- SCG3884: RES-Comprehensive Manufactured Home Program (Synergy)
- SCG3885: RES-Residential Manufactured Homes Program (Staples Energy)
- SCG3886: PUB-Public Direct Install
- SCG3887: COM-Commercial Building Energy Solutions & Technology
- SCG3888: RES-Multi-Family Space and Water Heating Controls
- SCG3889: RES-Multifamily Energy Alliance
- SCG3890: AG-Agriculture Energy Efficiency (AgEE) Program
- SCG3891: COM-Service RCx+ Program
- SCG3892: COM-Large Commercial Program
- SCG3898: COM-Behavioral Program
- SCG3899: PUB-Large EE Solicitation
- SCG3900: IND-Industrial Solicitation
- SCG3901: CC-Outreach Solicitation
- SCG3909: CC-Nonresidential Energy Advisor
- SCG3910: CC-Nonresidential Calculated Incentives
- SCG3911: CC-Nonresidential Deemed Incentives
- SCG3912: PUB-Regional Energy Pathways
- SCG3913: PUB-REN Fiscal Management & Coordination
- SCG-ESAP: Energy Savings Assistance Program
- 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\_QIQM: RES-SW-QI/QM
- SCG\_SW\_HVAC\_QIQM\_PA: RES-SW-QI/QM-PA
- SCG\_SW\_HVAC\_Up: COM-SW-Upstream HVAC
- SCG\_SW\_HVAC\_Up\_PA: COM-SW-Upstream HVAC-PA
- SCG\_SW\_IP\_Colleges: PUB-SW-Institutional Partnership: UC/CSU/CCC
- SCG\_SW\_IP\_Colleges\_PA: PUB-SW-Institutional Partnership: UC/CSU/CCC-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\_Ag\_mixed: AG-SW-Mixed-Fuel Non-Res New Construction
- SCG\_SW\_NC\_NonRes\_Ag\_mixed\_PA: AG-SW-Mixed-Fuel Non-Res New Construction-PA
- SCG\_SW\_NC\_NonRes\_Com\_mixed: COM-SW-Mixed-Fuel Non-Res New Construction
- SCG\_SW\_NC\_NonRes\_Com\_mixed\_PA: COM-SW-Mixed-Fuel Non-Res New Construction-PA
- SCG\_SW\_NC\_NonRes\_Ind\_mixed: IND-SW-Mixed-Fuel Non-Res New Construction
- SCG\_SW\_NC\_NonRes\_Ind\_mixed\_PA: IND-SW-Mixed-Fuel Non-Res New Construction-PA
- SCG\_SW\_NC\_NonRes\_Pub\_mixed: PUB-SW-Mixed-Fuel Non-Res New Construction
- SCG\_SW\_NC\_NonRes\_Pub\_mixed\_PA: PUB-SW-Mixed-Fuel Non-Res New Construction-PA
- SCG\_SW\_NC\_NonRes\_Res\_mixed: RES-SW-Mixed-Fuel Non-Res New Construction
- SCG\_SW\_NC\_NonRes\_Res\_mixed\_PA: RES-SW-Mixed-Fuel Non-Res New Construction-PA
- SCG\_SW\_NC\_Res\_Mixed: RES-SW-New Construction-Mixed Fuel
- SCG\_SW\_NC\_Res\_Mixed\_PA: RES-SW-New Construction-Mixed Fuel-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
- SCG\_SW\_WP: PUB-SW-Water/Wastewater Pumping
- SCG\_SW\_WP\_PA: PUB-SW-Water/Wastewater Pumping-PA

## CEDARS FILING SUBMISSION RECEIPT

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

PA: Southern California Gas (SCG)

Budget Filing Year: 2023

Submitted: 22:16:39 on 05 Jan 2022

By: Tony Chun

Advice Letter Number: AL5898-A

### \* Portfolio Budget Filing Summary \*

- TRC: 1.3
- PAC: 3.24
- TRC (no admin): 1.7
- PAC (no admin): 7.77
- RIM: 3.06
- Budget: \$132,634,745.38
- TotalSystemBenefit: \$451,529,741.26
- ElecBen: \$15,671,858.96
- GasBen: \$421,013,524.19
- OtherBen: \$0.00
- TRCCost: \$336,122,020.02
- PACCost: \$134,932,545.54

### \* Programs Included in the Budget Filing \*

- SCG3701: RES-Energy Advisor
- SCG3702: RES-Residential Energy Efficiency Program
- SCG3705: RES-Home Upgrade Program
- SCG3707: RES-RNC
- SCG3714: IND-SEM
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- SCG\_SW\_CSA\_Bldg\_PA: C&S-SW-Building; Codes Advocacy-PA
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- SCG\_SW\_NC\_NonRes\_Ind\_mixed\_PA: IND-SW-Mixed-Fuel Non-Res New Construction-PA
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- SCG\_SW\_WP\_PA: PUB-SW-Water/Wastewater Pumping-PA

**ATTACHMENT C**

**Advice No. 5898-A**

**Supplemental Budget Information 2022-2023**

**ATTACHMENT C**

**Supplemental Budget Information 2022-2023**

**(Modified to Incorporate Dates Relevant to D.21-05-031)**

**Approved Meet & Confer Document by Program Administrators, Office of Ratepayers and  
The Utility Reform Network in A.17-01-003 et. al.**

**Required by D.18-05-041 Ordering Paragraph 44**



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## **Attachment C**

### **Approved Meet & Confer Document by Program Administrators, Office of Ratepayers and The Utility Reform Network**

#### **BACKGROUND:**

Decision (D.) 18-05-041 Ordering Paragraph 44 states:

Beginning with the annual budget advice letters due on September 3, 2019, the program administrators must include updated budget estimates in the same format as the supplemental budget information filed in this proceeding on June 12, 2017.

Therefore, consistent with this Commission direction, this narrative and the accompanying Attachment A Tables 9 through 16, PA provides the following information in Attachment B.

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

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

###### **1. Functions conducted by each department/organization**

###### **PA Response:**

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

- Customer Strategy and Engagement Department – Provides support for the marketing and outreach of EE programs.
- 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. Energy Efficiency Management Structure and Org Chart**

###### **PA Response:**

Please see Attachment D

**3. Staffing needs by department/organization, including current and forecast for 2022-2023, as well as a description of what changes are expected between 2024-2027 or why it's impossible to predict beyond 2024, if that's the PA's position.**

**PA Response :**

SoCalGas provides the requested information regarding its staffing needs based on actual data for 2020 and forecasted assumptions for 2022 and 2023, by function at the aggregated category in Attachment 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 between 2024-2027 or why it's impossible to predict beyond-2024, if that's the PA's position.**

**PA 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**

**PA 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**

**PA Response :**

SoCalGas' 2022 and 2023 budgets are based on the Commission-authorized cumulative budget set in D.18-05-041. 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.

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

**7. TURN and CAL PA like this example, taken from testimony PG&E’s 2017 GRC addressing its Energy Procurement department. We would be looking for 2019, 2020, or 2021 “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-2024.**

- Note, if PAs’ 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	<b>Total</b>	<b>321</b>	<b>331</b>	<b>331</b>	<b>335</b>

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

**PA 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 Attachment A, Portfolio Staffing table.

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

**8. Expenses broken out into labor, non-labor O&M (with contract labor identified) (\* Note, in case of conflict, excel budget template will control.)**

**PA Response :**

Please see the information provided in Attachment A.

**9. Identify any capital costs**

**PA Response :**

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

**D. Table showing cost drivers across the EE organization**

**10. TURN and CAL PA 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	3,507	57
2	Portfolio Complexity	1,136	18
3	Regulatory Mandates	1,192	19
4	Process Improvements	400	6
5	<b>Total</b>	<b>6,324</b>	<b>100</b>

(a) See WP Table 6-8, Exhibit (PG&E-5).

**PA 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 2022-2023 program year budget increases are attributed to new programs from local and SW solicitations, introduction of solar thermal, and the increased focus on hard-to-reach customers, to achieve the portfolio’s goals.

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

**11. 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.).**

**PA 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.

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

**PA 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.

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

**PA 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.

**15. How are burden benefit-related administrative and general (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.**

**PA 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.

**16. 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?**

**PA 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.

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

**PA 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**

This section refers to the April 14, 2017 Scoping Memo and Ruling of Assigned Commissioner and Administrative Law Judges in A.17-01-003 et. al.

**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.”

**18. TURN and CAL PA 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.**

**PA Response :**

Please see Attachment 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.”

**19. TURN and CAL PA invite the PAs to propose a common table format for this information. We don’t have anything specific in mind.**

**PA Response :**

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

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

**PA Response :**

**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).”

**21. TURN and CAL PA 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.10 Table.**

**PA Response :**

Please see Attachment E. As described in SoCalGas’ Business Plan, SoCalGas has planned for three phases of open solicitation. This schedule includes solicitations in progress and/or to be started in 2022 and 2023. Budget ranges will be provided in appropriate solicitation documents to the Procurement Review Group and to the bidding community according to the solicitation schedule.

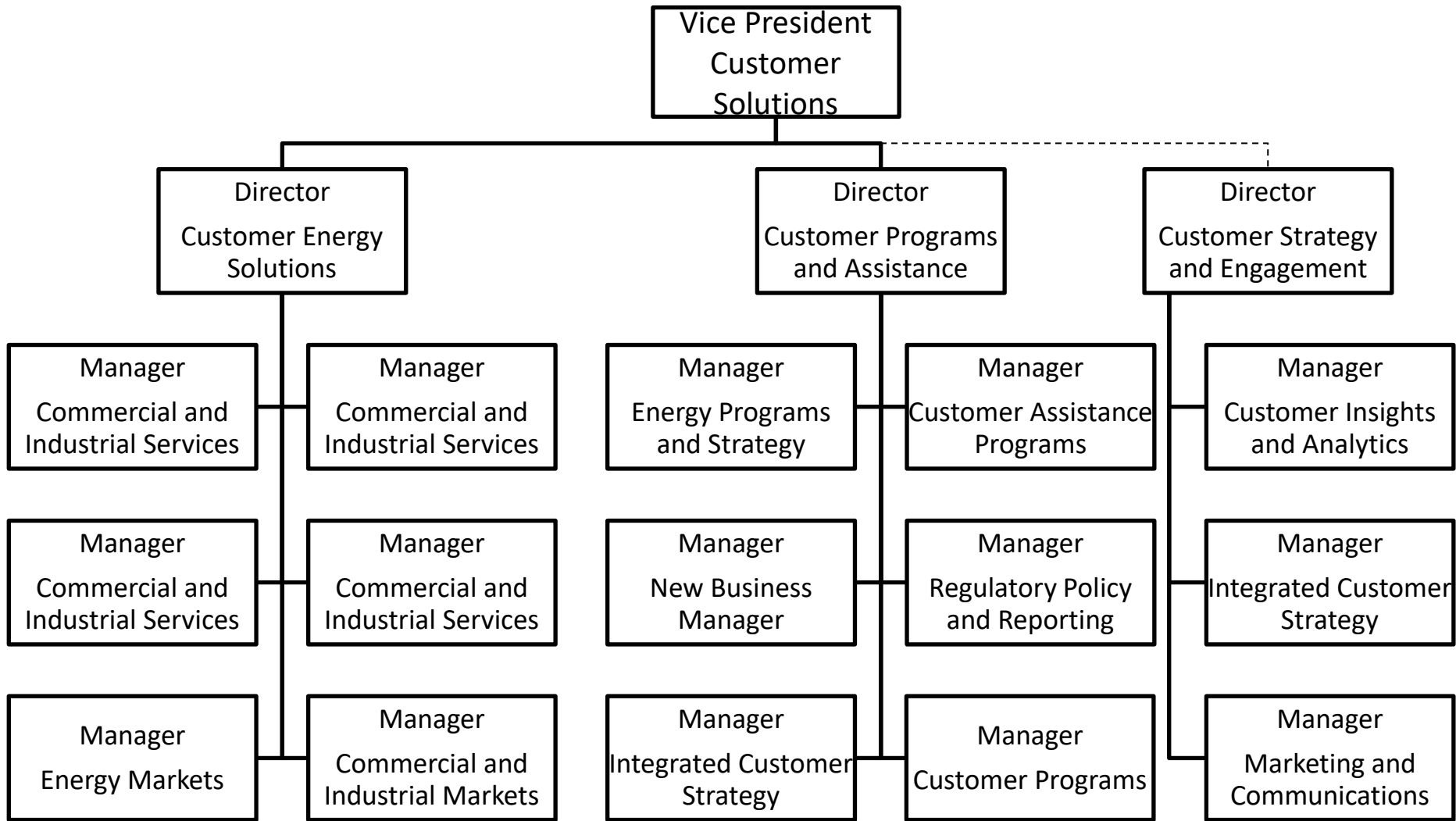


**ATTACHMENT D**

**Advice No. 5898-A**

**Departments/Organization  
Supporting Energy Efficiency Portfolio**

# Departments/Organization Supporting Energy Efficiency Portfolio



**ATTACHMENT E**

**Advice No. 5898-A**

**SCG Energy Efficiency  
Solicitation Timeline**

**SCG Energy Efficiency Solicitation Timeline**  
 Schedule as of 10/1/2021 (Schedule may be subject to change at IOU's discretion)

Year	2019												2020												2021												2022												2023											
Quarter	Q1			Q2			Q3			Q4			Q1			Q2			Q3			Q4			Q1			Q2			Q3			Q4			Q1			Q2			Q3			Q4														
Month	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	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Residential Single Family	RFP Prep						RFP						Contract Negotiation																																															
Residential Multifamily	RFP Prep						RFP						Contract Negotiation																																															
Small & Medium Commercial	RFA			RFP Prep			RFP						Contract Negotiation																																															
Small & Medium Public	RFA			RFP Prep			RFP						Contract Negotiation																																															
Point of Sale Food Service	RFA Prep						RFA			RFP Prep			RFP			Contract Negotiation																																												
Midstream Water Heating	RFA Prep						RFA			RFP Prep			RFP			Contract Negotiation																																												
Gas Emerging Technologies	RFA Prep						RFA			RFP Prep			RFP			Contract Negotiation																																												
Manufactured Housing (Re-issue RFA)	RFA Prep						RFA			RFP Prep			RFP			Contract Negotiation																																												
Large Commercial	RFA Prep						RFA			RFP Prep			RFP			Contract Negotiation																																												
Agricultural Sector	RFA Prep						RFA			RFP Prep			RFP			Contract Negotiation																																												
Behavioral Strategies	RFA Prep						RFA			RFP Prep			RFP			Contract Negotiation																																												
Industrial Segment Solutions	RFA Prep						RFA			RFP Prep			RFP			Contract Negotiation																																												
Large Public Sector (Re-Bid)	RFA Prep						RFA			RFP Prep			RFP			Contract Negotiation																																												
Outreach	RFA Prep						RFA			RFP Prep			RFP			Contract Negotiation																																												
Marketplace	RFA Prep						RFA			RFP Prep			RFP			Contract Negotiation																																												
Res MF Whole Building	RFA						RFP						Contract Negotiation																																															
Res EE Kits	RFA						RFP						Contract Negotiation																																															
Non-Res EE Advisor	RFA						RFP						Contract Negotiation																																															
Res Retail Partnering	RFA						RFP						Contract Negotiation																																															
HERS Rater Training	RFA						RFP						Contract Negotiation																																															
IDEEA365	RFA						RFP						Contract Negotiation																																															