

SOUTHERN CALIFORNIA GAS COMPANY
ENERGY SAVINGS ASSISTANCE AND CALIFORNIA ALTERNATE RATES FOR
ENERGY PROGRAMS & BUDGETS FOR PROGRAM YEARS 2021-2026

(A.19-11-006)

(DATA REQUEST CALADVOCATES-ESA-CARE-KS6-SCG06)

RECEIVED: MARCH 23, 2020

SUBMITTED: APRIL 6, 2020

QUESTION 1:

Please provide two tables in which you replicate SoCalGas' Table A-4's and Table A-4a's columns A-C, along with the Quantity Installed column for each year of the tables (2021-2026).

- a) Next to each Quantity Installed column, please state the basis for that year's Quantity Installed values.

RESPONSE 1:



CalAdvocates-ESA-C
ARE-KS-SoCalGas_Q

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QUESTION 2:

Please provide a table in which you replicate Table A-5's columns A-G. Insert columns after N, O, P, and Q, and in them next to each row 9-11 and 15-18, please state the basis of each row's:

- a) Total Participation Goals;
- b) Annual Goals; and
- c) Annual Metric

RESPONSE 2:



CalAdvocates-ESA-C
ARE-KS-SoCalGas_Q

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QUESTION 3:

Please provide a budget SoCalGas estimates an ESA Program independent evaluator (IE) would require, based on the cost of other IEs hired by SoCalGas (or multiple IEs, if SoCalGas has used multiple), e.g. the IEs used in the energy efficiency proceeding.

RESPONSE 3:

SoCalGas did not propose an independent evaluator in its application; therefore, there are no associated costs responsive to this request.. Should an independent evaluator be required in the ESA Program multi-family Whole Building solicitation efforts, SoCalGas estimates the timeline and budget below. The proposed timeline is based on the recent guidance provided by the Director of Energy Division to the California IOUs regarding the energy efficiency solicitation timeline.¹ The low and high estimated costs stated are based on SoCalGas' energy efficiency solicitation process for residential programs.

| | | |
|------------------------------|----------------------|-----------------------|
| <u>RFA</u> | <u>LOW</u> | <u>HIGH</u> |
| 12 Weeks | 15,000 | 30,000 |
| <u>RFP</u> | <u>LOW</u> | <u>HIGH</u> |
| 15 Weeks | 20,000 | 40,000 |
| <u>NEGOTIATIONS</u> | <u>LOW</u> | <u>HIGH</u> |
| 12 Weeks | 15,000 | 30,000 |
| <u>TOTAL 39 Weeks</u> | <u>50,000</u> | <u>100,000</u> |

¹ Edward Randolph, Director of Energy Division, letter to California IOUs, 11 Mar 2020.

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QUESTION 4:

Please provide a breakdown of all CARE Outreach and Marketing activities and costs on an annual basis in the following chart:

a) For each year, please include a forecast of the CARE penetration rate and how each activity is expected to contribute to the penetration rate.

| M&O Activity | 2021 | | 2022 | | 2023 | | 2024 | | 2025 | | 2026 | |
|--------------|--------|-------------------------|--------|-------------------------|--------|-------------------------|--------|-------------------------|--------|-------------------------|--------|-------------------------|
| | Budget | Incremental Penetration |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |

RESPONSE 4:

SoCalGas provides the budget for each CARE outreach and marketing cost below. SoCalGas is not able to forecast incremental penetration related to each activity, as outreach and marketing efforts are complementary to the program’s overall enrollment goal. SoCalGas forecasts that with continued marketing and outreach activities, it can maintain at least 95% CARE penetration.

| M&O Activity | 2021 | | 2022 | | 2023 | | 2024 | | 2025 | | 2026 | |
|--------------------------------------|------------------|-------------------------|------------------|-------------------------|------------------|-------------------------|------------------|-------------------------|------------------|-------------------------|------------------|-------------------------|
| | Budget | Incremental Penetration |
| Bill Inserts | 296,542 | | 301,143 | | 306,333 | | 311,818 | | 317,221 | | 322,548 | |
| Direct Mail | 997,268 | | 1,012,742 | | 1,030,194 | | 1,048,640 | | 1,066,812 | | 1,084,725 | |
| Innovative Outreach | 105,531 | | 107,168 | | 109,015 | | 110,967 | | 112,890 | | 114,786 | |
| Canvassing | 791,482 | | 803,764 | | 817,614 | | 832,254 | | 846,676 | | 860,893 | |
| E-Mail Campaigns | 42,212 | | 42,867 | | 43,606 | | 44,387 | | 45,156 | | 45,914 | |
| Collateral | 844,248 | | 857,348 | | 872,122 | | 887,737 | | 903,121 | | 918,286 | |
| Outreach | 633,186 | | 643,011 | | 654,091 | | 665,803 | | 677,341 | | 688,714 | |
| Capitation | 58,042 | | 58,943 | | 59,958 | | 61,032 | | 62,090 | | 63,132 | |
| Research Analytics & Data Purchasing | 79,148 | | 80,376 | | 81,761 | | 83,225 | | 84,668 | | 86,089 | |
| Mass & Ethnic Media | 633,186 | | 643,011 | | 654,091 | | 665,803 | | 677,341 | | 688,714 | |
| Total | 4,480,845 | 95% | 4,550,374 | 95% | 4,628,786 | 95% | 4,711,665 | 95% | 4,793,317 | 95% | 4,873,801 | 95% |

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QUESTION 5:

SoCalGas recommends the Commission authorize all needed budgets going forward and continued accounting for unspent funds from prior cycles is not necessary. Please describe how SoCalGas plans to use unspent funds from prior cycles.

RESPONSE 5:

Since the Direct Assistance Program Balancing Account (DAPBA) is a “one-way” balancing account, any over-collected balances in the DAPBA at the end of the program cycle will be refunded to ratepayers in connection with the Public Purpose Program (PPP) surcharge rate through an updated advice letter filing.²

² SoCalGas ESA Program Testimony at 165.

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QUESTION 6:

SoCalGas’s requested ESA O&M spend/household in this application more than doubles in most years compared to its previous cycle.

- a) Please provide a breakdown of each O&M strategy employed in the previous cycle along with its cost and any metric used to evaluate the strategy’s effectiveness, e.g., penetration, views, enrollments.
- b) Please provide a similar breakdown for the 2021-2026 ESA O&M strategies.

RESPONSE 6:

Please see SoCalGas’ response to Question 2 in Data Request 5 (Cal Advocates-ESA_CARE_KS6-SCG05), SoCalGas does not track marketing and outreach (M&O) cost in the SAP accounting system by marketing strategy for the ESA Program. SoCalGas tracks expenditure for M&O by cost element and by program category. For 2016-2020 historical expenditure information for M&O strategies per household, SoCalGas is providing the information as one-line item under “Total M&O Cost per Household”. ESA Table 2 from the monthly reports was referenced for total number of homes treated from 2016-2020.

| ESA ME&O Cost Per Household | | | | | | | | | | | |
|--|------------------------------|-------------|-------------|-------------|--------------|----------------------------------|------|------|------|------|------|
| Marketing Tactic | Past Cost Per Household (\$) | | | | | Forecast Cost Per Household (\$) | | | | | |
| | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 |
| Direct To Customer Marketing | | | | | | | | | | | |
| Bill Inserts | | | | | | 0.17 | 0.18 | 0.18 | 0.18 | 0.18 | 0.19 |
| Direct Mail | | | | | | 2.90 | 2.95 | 2.95 | 2.95 | 3.00 | 3.05 |
| Innovative Outreach | | | | | | 0.82 | 0.83 | 0.84 | 0.86 | 0.87 | 0.89 |
| Email Campaign | | | | | | 0.05 | 0.04 | 0.04 | 0.04 | 0.04 | 0.05 |
| Collateral | | | | | | 1.44 | 1.38 | 1.39 | 1.39 | 1.41 | 1.44 |
| Outreach | | | | | | 1.92 | 1.85 | 1.85 | 1.85 | 1.88 | 1.91 |
| Postage & Shipping | | | | | | 0.34 | 0.34 | 0.35 | 0.35 | 0.36 | 0.37 |
| Research, Analytics, & Data Purchasing | | | | | | 0.72 | 0.73 | 0.74 | 0.76 | 0.77 | 0.78 |
| | | | | | | | | | | | |
| Media Costs | | | | | | | | | | | |
| Mass & Ethnic Media | | | | | | 6.24 | 6.33 | 6.44 | 6.56 | 6.67 | 6.78 |
| | | | | | | | | | | | |
| Total M&O Tactic Cost Per Household | 16.46 | 9.79 | 3.64 | 9.70 | 18.49 | | | | | | |

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QUESTION 7:

Please identify which ESA O&M strategies, if any, in the previous cycle were least effective in encouraging participation and

- a) Also identify whether SoCalGas has reduced total spend on the least effective strategies for the 2021-2026 cycle.

RESPONSE 7:

In the previous program cycle, SoCalGas identified opportunities to improve certain M&O strategies, but not reduce their spend. As discussed in section II.2.D.ii of the ESA testimony, opportunities for improvement include: expanding consistent general awareness efforts, strengthening internal and external channel coordination, enhancing community outreach, and streamlining direct marketing tactics.³ SoCalGas plans to continue its successful M&O strategies from the previous program cycle and incorporate lessons learned to enhance and streamline those strategies to support the ESA Program goals.

³ SoCalGas ESA Program Testimony, pp. 83-88.

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QUESTION 8:

Please provide a narrative description of SoCalGas' "uberization" process and how such process will be implemented.

- a) Please provide an example of how the uberization process works with measure installations.
- b) Please provide estimates of the budget impact of uberization on the overall program.

RESPONSE 8:

a) SoCalGas intends to explore options to allow customers to immediately apply or schedule an on-line appointment for measure installation, research contractors based on customer reviews, and submit customer reviews after receiving measure installations all from their smart phones. In some cases, direct installation of simple measures by customers may be feasible as well, providing a higher degree of control, privacy, and engagement to those customers for whom this option is appealing. These aspects of uberization all support the goal of improving customers' experience and adoption of measures installed through the ESA Program. SoCalGas has not determined specifically how all these program elements will be implemented. Program elements supporting uberization will be part of SoCalGas' approach in implementing the new program cycle including in its selection of systems vendors and service-providing contractors. As SoCalGas provided in its ESA testimony:

"SoCalGas has identified a number of changes to "uberize" the ESA Program design and delivery that are intended to better serve customers by empowering them and meeting their expectations. These include the following:

- On-line equivalents for the enrollment, energy education, and income documentation phases of the ESA Program, providing a channel that will be found less intrusive and more appealing to some customers.
- On-line interfaces providing an e-commerce style interaction with the customer, clearly identifying measures the customer may be interested in and simple actions that need to be taken to advance in the program.

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- System features to allow customers to make their own appointments, that will ultimately incorporate support for customer feedback and research, and will match service-providing contractors with customers based on the opportunity and the contractor’s capabilities.

 - Options for customers to self-serve the installation of simple measures and potentially self-assess relatively less-complicated measures.

 - Contractor license, inspection results, training status, feedback, and availability to be maintained within the system to the individual installer level, allowing more effective performance review and real time matching of capable contractors with customers’ needs.”⁴

b) Based on SoCalGas’ ESA testimony, the impact on SoCalGas’ budget proposal of activities related to uberization is a net savings of roughly \$35 million over the period 2021- 2026, calculated as follows: \$9.3 million for IT related nonlabor costs needed to build and operate SoCalGas’ proposed new technology platform.⁵ Of this total, SoCalGas estimates that \$4 - \$5 million would be needed to maintain a status-quo program,⁶ with the difference \$4.3 - \$5.3 million representing the incremental cost of the new platform which is central to uberization initiatives. In SoCalGas’ proposed budget, the company SoCalGas identified \$40 million in specific cost reductions in its proposed budget due to online enrollment and energy education, which are among the elements of uberization provided above. Thus, the net savings are \$40 million minus \$4.3 - \$5.3 million incremental system costs, yielding savings of \$34.7 - \$35.7 million.

⁴ SoCalGas ESA Program Testimony at 22.

⁵ SoCalGas ESA Program Testimony at 73.

⁶ SoCalGas ESA Program Testimony at 71.

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QUESTION 9:

What, if any, forecast of customer meter growth does SoCalGas' use in its ESA, CARE, and FERA enrollment forecasts?

- a) If SoCalGas uses a forecast, please state the basis for the forecast.

RESPONSE 9:

While SoCalGas does not use forecasts of customer meter growth for the ESA Program, SoCalGas does use forecasts of customer meter growth to determine its CARE enrollment forecasts. CARE meter growth forecasts for 2020 – 2026 are as follows:

| | |
|------|-------|
| 2020 | 0.83% |
| 2021 | 0.86% |
| 2022 | 0.87% |
| 2023 | 0.88% |
| 2024 | 0.87% |
| 2025 | 0.86% |
| 2026 | 0.85% |

- a) The basis for meter growth forecast is data collected in the preparation of the 2018 California Gas Report. SoCalGas uses econometric models to produce its customer/meter forecasts. The factor driving the residential market growth is residential housing starts.

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QUESTION 10:

Does SoCalGas incorporate an estimate of rebound into its ESA energy savings goals?

- a) If yes, state the estimate, the basis for the estimate, and where the estimate is incorporated into SoCalGas' testimony.
- b) If no, state the basis for not using such an estimate.

RESPONSE 10:

Yes, SoCalGas does incorporate an estimate of rebound into its ESA energy savings goals.

- a) The 2015-2017 impact evaluation results found negative savings values for furnace clean and tune, and furnace repair and replacement measures. These measures' savings values are incorporated into the ex-ante estimates, as a result of the impact evaluation.

SoCalGas' ESA Program energy savings goals also include new HE Wall Furnace measures that are in place to reduce the rebound effect of current furnace measures.

- b) N/A.

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QUESTION 11:

For low-income program elements that share resources (e.g. marketing materials and Gas Service Representatives) with other programs, what controls, policies, and procedures does SoCalGas propose to use in 2021-2026 to ensure that the low-income program accounts are only charged for the low-income program-related use of these resources?

RESPONSE 11:

To ensure that low-income program accounts are only charged for the low-income program-related use, SoCalGas will establish a unique internal order (IO) number for each of the program category. By utilizing the established unique IO number and the use of the 3rd party timekeeping application referred to as “MyTime”. The application will be utilized using the IO number to capture all labor hours for all employees for each workday working on the low-income program. At the conclusion of each biweekly MyTime timekeeping cycle, each employee’s time and internal order entries are required to be (1) certified and submitted by the employee; and (2) reviewed and approved by the employee’s supervisor to reflect the work being done for the low-income program.

As for non-labor related transactions, the low-income program will also use the established internal order numbers and the cost elements (description of the cost) to identify the type of charges for the low-income program. To ensure the charges are accurate, the processing, reviewing, and approving of charges from the external party will be managed using the standalone HEAT system and the SAP accounting system. Within the systems, review and approval for the service/goods rendered and the accounting (internal order numbers and cost elements) will follow the established approval workflow process to ensure charges are for low-income program. To mitigate any potential mischarges to the low-income program, charges to all the low-income internal order numbers are reviewed and validated by the low-income program advisors and analysts following each month-end close of business.

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QUESTION 12:

Please provide the tracking data SoCalGas collected and any evaluations SoCalGas conducted about second refrigerator recycling and replacements as ordered by Decision (D.) 16-11-022 and D.17-12-009.

RESPONSE 12:

SoCalGas does not have a refrigerator measure.

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QUESTION 13:

Please state the effects on gas usage and bills of all proposed measures that will increase gas usage and/or bills.

RESPONSE 13:

The 2015-2017 impact evaluation results found negative savings on furnace clean and tune and furnace repair and replacement measures. This negative effect on gas usage and bills is stemmed from cases that the measures installed allow the customers to utilize the equipment, which might have originally been broken/unable to function, for their household's health and comfort, i.e., consuming more energy than before. Since ESA Program's goal includes health, comfort, and safety of its customers, in addition to energy savings, SoCalGas continues to offer these measures where necessary, along with the new and efficient furnace measures of HE Wall Furnace, to bring a reduction to the increase of gas usage and bills to a lower level.

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QUESTION 14:

Please describe SoCalGas' "Outreach & Assessment" and "In-Home Education" measures.

RESPONSE 14:

The following responses are from SoCalGas' ESA Program testimony.

Customer Enrollment & Assessment⁷: The customer enrollment subcategory includes all fees related to enrollment and assessment activities including income qualification, enrollment of customers, assessment of feasible measures, and the cost of materials used in in-person enrollments. The forecast activity frequencies have been adjusted to reflect SoCalGas' plan to transition customer enrollment from an in-person only activity, to 65% of initial enrollments occurring online by 2026, resulting in a forecasted savings to ratepayers of \$11.9 million per year by the end of the program cycle.

SoCalGas has identified a number of changes to "uberize" the ESA Program design and delivery that are intended to better serve customers by empowering them and meeting their expectations. These include the following:

- On-line equivalents for the enrollment, energy education, and income documentation phases of the ESA Program, providing a channel that will be found less intrusive and more appealing to some customers.
- On-line interfaces providing an e-commerce style interaction with the customer, clearly identifying measures the customer may be interested in and simple actions that need to be taken to advance in the program.
- System features to allow customers to make their own appointments, that will ultimately incorporate support for customer feedback and research, and will match service-providing contractors with customers based on the opportunity and the contractor's capabilities.

⁷ SoCalGas describes its Customer Enrollment & Assessment in its proposal for 2021-2026 program years for the ESA program in page 22-23 in the prepared direct testimony of Mr. Aguirre.

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- Options for customers to self-serve the installation of simple measures and potentially self-assess relatively less-complicated measures.
 - Contractor license, inspection results, training status, feedback, and availability to be maintained within the system to the individual installer level, allowing more effective performance review and real time matching of capable contractors with customers' needs.

Initially, SoCalGas intends to introduce new service bundles that will be grouped according to contractor capabilities and current program organization. SoCalGas anticipates these will change as the features described below drive more efficient visit components:

- Outreachers capable of performing in-home energy education, walking the customer through enrollment and income documentation processes, installing "simple" measures including faucet aerator, showerhead, and thermostatic shower valve, and assessing the need for infiltration measures, safety measures, and appliance measures in the home.
- Safety measures and appliance check / pre-natural gas appliance testing (NGAT) crew capable of evaluating feasibility of infiltration measures and inspecting appliances, installing safety measures as well as any water measures not installed previously (for instance, if the customer enrolled online and did not have an outreach visit).
 - Attic insulation crew.
 - Infiltration measures and NGAT crew.
 - Furnace repair/furnace installation crew, also capable of performing smart thermostat installation and duct testing and sealing to comply with Title 24.
 - Water heater repair/replacement crew.
 - High efficiency clothes washer installation/recycling.
- Developing a more comprehensive and consistent marketing and outreach approach that keeps the ESA Program top of mind with eligible customers and motivates them to enroll.

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Energy Education⁸: SoCalGas proposes to rename the existing “In-Home Education” budget subcategory to, “Energy Education,” acknowledging that, under SoCalGas’ proposed transition to online customer engagement, up to 65% of customers would receive energy education online by the end of the cycle. This transition is forecast to provide annual savings of over \$700,000 per year by 2026. The category includes the cost of all fees paid to contractors for energy education activities, as well as the cost of energy education related materials.

SoCalGas recognizes the value in the enhanced energy education it will be providing ESA Program participants and for this reason is proposing that energy education be provided to all eligible customers who show interest in the ESA Program regardless of their stage in receiving services. SoCalGas believes it is highly beneficial to leverage the provision of education to remove barriers to program participation and promote energy savings and conservation on a much grander scale, but still being mindful of program costs by limiting the delivery through new technological methods.

SoCalGas plans to move away from a hard copy energy education booklet and focus on customized online energy education modules. Short single topic videos designed to educate the customer on conservation, environmental impacts associated with energy conservation practices, and program measures and awareness. These energy education videos will be delivered and made accessible to the customer throughout the entire process from the moment they demonstrate interest to post installation of measures. This will serve to elevate the customer experience and increase program satisfaction while educating the customer. Giving the customer the option to opt-in to receiving monthly or quarterly educational modules via email will establish and build a positive relationship with the customer revolving around savings and conservation. The messages of the videos will also be tailored to the customer’s stage in the program.

All of the educational modules will be delivered to customers via the new technology platform where tracking and analytics will be used to evaluate the delivery, participation, value and success. These will also be available on the ESA Program website to reach a broader audience, address language barriers and continue to educate SoCalGas customers as a whole. Energy education should not be limited to in home delivery nor should it be limited to be provided only at the time of enrollment. It is SoCalGas’ goal to educate customers on energy conservation methods for their home through delivery tools that are accessible and convenient with continuous tips that can be easily incorporated into their daily lives resulting in increased energy savings.

⁸ SoCalGas describes its Customer Enrollment & Assessment in its proposal for 2021-2026 program years for the ESA program in page 68-70 in the prepared direct testimony of Mr. Aguirre.

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QUESTION 15:

Will any of the work performed under “General Admin” be performed by contractors, and if yes, have the contractors already been selected?

- a) If the contractor(s) have been selected, was the solicitation sole-source or competitive?
 - i) If sole-source, provide the sole-source documentation. If competitively solicited, provide a copy of the solicitation and the final contract(s).
- b) If the contractor(s) have not yet been selected, please describe the planned procurement processes and provide any procurement (e.g. solicitation) materials available.

RESPONSE 15:

Contractors will perform work under General Admin, but they have not been selected at this time.

- a) Contractors have yet to be selected.
- b) SoCalGas currently does not have a planned procurement process nor does not have any procurement materials available at this time for the 2021-2026 program cycle.

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 SUBMITTED: APRIL 6, 2020

QUESTION 16:

Please provide a detailed breakdown of the budgets for all the ESA, CARE, and FERA program elements and strategies implemented in program years 2015-2020, broken down by activities and labor categories. The budget categories should be broken down to the level of detail illustrated in the table below. Provide your response in Excel format, amending the row titles and adding rows in the table below as needed to accurately reflect SoCalGas' budgets.

| Program / Budget Category | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
|---|-------------|-------------|-------------|-------------|-------------|-------------|
| General Admin | | | | | | |
| Labor | | | | | | |
| Customer Application/Rebate and Incentive Processing | | | | | | |
| Engineering Services | | | | | | |
| IT | | | | | | |
| Policy, Strategy, and Regulatory Reporting Compliance | | | | | | |
| Portfolio Analytics | | | | | | |
| Program Management | | | | | | |
| Travel & Employee Expenses | | | | | | |
| Non Labor-CSOD Including CW | | | | | | |
| CG Services | | | | | | |
| Printing | | | | | | |
| Procurement Surcharge | | | | | | |
| Production of EE Packets | | | | | | |
| Discretionary | | | | | | |
| Sub-Total Excluding IT Costs | | | | | | |
| IT Costs | | | | | | |
| Direct Technology Contract | | | | | | |
| Internal IT Costs | | | | | | |
| New Database | | | | | | |
| Database Maintenance | | | | | | |
| Sub-Total IT Costs | | | | | | |
| Total General Admin Costs | | | | | | |

SOUTHERN CALIFORNIA GAS COMPANY
ENERGY SAVINGS ASSISTANCE AND CALIFORNIA ALTERNATE RATES FOR
ENERGY PROGRAMS & BUDGETS FOR PROGRAM YEARS 2021-2026

(A.19-11-006)
 (DATA REQUEST CALADVOCATES-ESA-CARE-KS6-SCG06)
 RECEIVED: MARCH 23, 2020
 SUBMITTED: APRIL 6, 2020

RESPONSE 16:

| PY 2015-2020 SoCalGas Energy Savings Assistance Program Authorized Budgets | | | | | | |
|--|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|
| Program Budget Category | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
| Appliances | \$ 17,785,151 | \$ 17,785,151 | \$ 16,450,664 | \$ 17,117,000 | \$ 17,459,339 | \$ 18,099,837 |
| Domestic Hot Water | \$ 16,843,374 | \$ 16,843,374 | \$ 25,541,417 | \$ 20,236,546 | \$ 20,641,275 | \$ 20,189,371 |
| Enclosure | \$ 41,983,756 | \$ 41,983,756 | \$ 31,356,733 | \$ 32,374,249 | \$ 33,021,730 | \$ 33,990,377 |
| HVAC | \$ 19,210,885 | \$ 19,210,885 | \$ 23,190,540 | \$ 23,488,373 | \$ 23,958,138 | \$ 24,437,294 |
| Maintenance | \$ 2,128,846 | \$ 2,128,846 | \$ 1,922,439 | \$ 1,937,734 | \$ 1,976,488 | \$ 2,016,018 |
| Customer Enrollment | \$ 20,834,354 | \$ 20,834,354 | \$ 17,994,860 | \$ 18,515,920 | \$ 18,886,236 | \$ 19,379,347 |
| In Home Education | \$ 2,531,192 | \$ 2,531,192 | \$ 5,021,521 | \$ 3,798,033 | \$ 3,873,993 | \$ 3,951,472 |
| Energy Efficiency TOTAL | \$121,317,558 | \$121,317,558 | \$121,478,173 | \$117,467,855 | \$119,817,199 | \$122,063,716 |
| Training Center | \$ 681,105 | \$ 681,105 | \$ 901,998 | \$ 908,314 | \$ 926,480 | \$ 945,010 |
| Inspections | \$ 3,361,051 | \$ 3,361,051 | \$ 2,509,088 | \$ 2,341,714 | \$ 2,429,147 | \$ 2,636,480 |
| Marketing and Outreach | \$ 1,198,436 | \$ 1,198,436 | \$ 1,450,000 | \$ 1,450,000 | \$ 1,450,000 | \$ 1,450,000 |
| Statewide ME&O | \$ 100,000 | \$ 100,000 | \$ - | | | |
| M&E Studies | \$ 91,667 | \$ 91,667 | \$ 115,625 | \$ 153,125 | \$ 115,625 | \$ 115,625 |
| Regulatory Compliance | \$ 295,333 | \$ 295,333 | \$ 471,807 | \$ 344,307 | \$ 351,194 | \$ 358,217 |
| General Administration | \$ 5,286,041 | \$ 5,286,041 | \$ 6,356,574 | \$ 6,500,414 | \$ 6,661,106 | \$ 6,818,403 |
| CPUC Energy Division | \$ 86,000 | \$ 86,000 | \$ 86,000 | \$ 86,000 | \$ 86,000 | \$ 86,000 |
| TOTAL PROGRAM COSTS | \$132,417,191 | \$132,417,191 | \$133,369,265 | \$129,251,729 | \$131,836,750 | \$134,473,450 |

Budget information for 2015 – 2020 provided at the program category level due to 1) budgets for the ESA and CARE Programs were adopted at the program categories, and 2) 2015 and 2016 were considered as bridge-fund periods where 2014 authorized budget at the program category was applied.

SOUTHERN CALIFORNIA GAS COMPANY
ENERGY SAVINGS ASSISTANCE AND CALIFORNIA ALTERNATE RATES FOR
ENERGY PROGRAMS & BUDGETS FOR PROGRAM YEARS 2021-2026

(A.19-11-006)
 (DATA REQUEST CALADVOCATES-ESA-CARE-KS6-SCG06)

RECEIVED: MARCH 23, 2020

SUBMITTED: APRIL 6, 2020

| PY 2015-2020 SoCalGas CARE Program Authorized Budgets | | | | | | |
|---|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Program Budget Category | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
| Marketing and Outreach | \$ 3,750,223 | \$ 3,750,223 | \$ 3,539,732 | \$ 4,004,885 | \$ 4,004,885 | \$ 4,004,885 |
| Proc Cert & Re-certification | \$ 4,488,248 | \$ 4,488,248 | \$ 2,509,631 | \$ 2,966,518 | \$ 2,966,518 | \$ 2,966,518 |
| Post Enrollment Verification | \$ 3,744,000 | \$ 3,744,000 | \$ 148,382 | \$ 154,833 | \$ 154,833 | \$ 154,833 |
| I.T. Programming | \$ 2,937,450 | \$ 2,937,450 | \$ 1,987,440 | \$ 1,037,796 | \$ 1,037,796 | \$ 1,037,796 |
| Energy Efficiency TOTAL | \$ 14,919,921 | \$ 14,919,921 | \$ 8,185,185 | \$ 8,164,032 | \$ 8,164,032 | \$ 8,164,032 |
| Pilots/CHANGES | \$ 183,600 | \$ 325,000 | \$ 437,502 | \$ 437,502 | \$ 437,502 | \$ 437,502 |
| Measurement and Evaluation | \$ 18,659 | \$ 18,659 | | | \$ - | \$ - |
| Regulatory Compliance | \$ 242,507 | \$ 242,507 | \$ 456,031 | \$ 475,858 | \$ 475,858 | \$ 475,858 |
| M&E Studies | | | | | \$ - | \$ - |
| General Administration | \$ 943,426 | \$ 943,426 | \$ 952,404 | \$ 953,729 | \$ 953,729 | \$ 953,729 |
| CPUC Energy Division | \$ 60,000 | \$ 60,000 | \$ 60,000 | \$ 60,000 | \$ 60,000 | \$ 60,000 |
| PROGRAM COSTS | \$ 16,368,113 | \$ 16,509,513 | \$ 10,091,122 | \$ 10,091,122 | \$ 10,091,122 | \$ 10,091,122 |
| Subsidies and Benefits | \$ 131,142,177 | \$ 131,142,177 | \$ 131,338,535 | \$ 132,351,979 | \$ 133,675,499 | \$ 135,012,254 |
| TOTAL PROGRAM COSTS | \$ 147,510,290 | \$ 147,651,690 | \$ 141,429,657 | \$ 142,443,101 | \$ 143,766,621 | \$ 145,103,376 |



DR #6 Ques16
 -ESA-CARE BudTbIs -

Budget information for 2015 – 2020 provided at the program category level due to 1) budgets for ESA and CARE Programs were adopted at the program categories, and 2) 2015 and 2016 were considered as bridge-fund periods where 2014 authorized budget at the program category was applied.

SOUTHERN CALIFORNIA GAS COMPANY
ENERGY SAVINGS ASSISTANCE AND CALIFORNIA ALTERNATE RATES FOR
ENERGY PROGRAMS & BUDGETS FOR PROGRAM YEARS 2021-2026
(A.19-11-006)
(DATA REQUEST CALADVOCATES-ESA-CARE-KS6-SCG06)
RECEIVED: MARCH 23, 2020
SUBMITTED: APRIL 6, 2020

QUESTION 17:

This is a clarification of data request No. CalAdvocates-ESA_CARE_KS6-SCG05, the question referred to “program elements and strategies... listed in the answer to question 2 (for ESA and FERA) and SCE’s Testimony (for CARE).” The question should really refer to the table above, so please replace that data request’s question 5 with this one:

Please provide a detailed breakdown of the actual recorded expenditures for all the ESA, CARE, and FERA program elements and strategies implemented in program years 2015-2020, broken down by activities and labor categories. Provide your response in Excel format. This table should have identical row and column headings and be directly comparable to the table provided in response to question 16.

RESPONSE 17:

Please see response to Question 4 of Cal Advocates-ESA_CARE_SGC05.

SOUTHERN CALIFORNIA GAS COMPANY
ENERGY SAVINGS ASSISTANCE AND CALIFORNIA ALTERNATE RATES FOR
ENERGY PROGRAMS & BUDGETS FOR PROGRAM YEARS 2021-2026

(A.19-11-006)

(DATA REQUEST CALADVOCATES-ESA-CARE-KS6-SCG06)

RECEIVED: MARCH 23, 2020

SUBMITTED: APRIL 6, 2020

QUESTION 18:

Please provide a detailed breakdown of the budgets for all the ESA, CARE, and FERA program elements and strategies proposed for program years 2021-2026, broken down by activities and labor categories. The individual program elements and strategies should include those listed in SoCalGas' testimony, as well as (noted separately) any others that may have been excluded in the testimony. The budget categories should be broken down to the level of detail illustrated in the table above (see response to question 16 of this data request).

Provide your responses in Excel format, amending the column and row titles and adding rows in the table above as needed to accurately reflect SoCalGas' planned budgets.

SOUTHERN CALIFORNIA GAS COMPANY
ENERGY SAVINGS ASSISTANCE AND CALIFORNIA ALTERNATE RATES FOR
ENERGY PROGRAMS & BUDGETS FOR PROGRAM YEARS 2021-2026

(A.19-11-006)
 (DATA REQUEST CALADVOCATES-ESA-CARE-KS6-SCG06)
 RECEIVED: MARCH 23, 2020
 SUBMITTED: APRIL 6, 2020

RESPONSE 18:

| PY 2021-2026 SoCalGas Energy Savings Assistance Program Budgets | | | | | | |
|---|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Program Budget Category | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 |
| Appliances | \$ 7,715,628 | \$ 7,835,351 | \$ 7,970,369 | \$ 8,113,080 | \$ 8,253,677 | \$ 8,392,264 |
| Domestic Hot Water | \$ 22,748,044 | \$ 23,015,683 | \$ 23,317,510 | \$ 23,636,537 | \$ 23,950,838 | \$ 24,260,644 |
| Enclosure | \$ 22,767,792 | \$ 23,121,080 | \$ 23,519,500 | \$ 23,940,622 | \$ 24,355,505 | \$ 24,764,455 |
| HVAC | \$ 27,709,767 | \$ 28,139,739 | \$ 28,624,640 | \$ 29,137,170 | \$ 29,642,108 | \$ 30,139,825 |
| Maintenance | \$ 13,577,853 | \$ 13,788,541 | \$ 14,026,143 | \$ 14,277,284 | \$ 14,524,705 | \$ 14,768,587 |
| Lighting | | | | | | |
| Miscellaneous | | | | | | |
| Customer Enrollment | \$ 21,689,480 | \$ 19,980,894 | \$ 18,244,817 | \$ 16,453,861 | \$ 14,584,669 | \$ 12,639,054 |
| In Home Education | \$ 1,677,763 | \$ 1,577,329 | \$ 1,475,863 | \$ 1,371,339 | \$ 1,261,884 | \$ 1,147,616 |
| Pilot | | | | | | |
| Energy Efficiency TOTAL | \$ 117,886,327 | \$ 117,458,617 | \$ 117,178,842 | \$ 116,929,894 | \$ 116,573,387 | \$ 116,112,445 |
| Training Center - (NL) | \$ 630,020 | \$ 606,264 | \$ 251,256 | \$ 251,423 | \$ 251,280 | \$ 251,147 |
| Training Center - (Labor) | \$ 615,836 | \$ 634,542 | \$ 653,237 | \$ 672,067 | \$ 691,262 | \$ 710,743 |
| Total Training Center | \$ 1,245,856 | \$ 1,240,806 | \$ 904,493 | \$ 923,490 | \$ 942,543 | \$ 961,890 |
| Workforce Education and Training | \$ 61,208 | \$ 1,277,520 | \$ 1,279,678 | \$ 1,280,525 | \$ 1,279,801 | \$ 1,279,123 |
| Inspections | \$ 1,839,932 | \$ 1,868,483 | \$ 1,900,680 | \$ 1,934,712 | \$ 1,968,240 | \$ 2,001,289 |
| Marketing and Outreach | \$ 1,604,451 | \$ 1,609,421 | \$ 1,626,517 | \$ 1,643,820 | \$ 1,672,307 | \$ 1,700,386 |
| Statewide Marketing and Outreach | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| Studies | \$ 112,500 | \$ 218,750 | \$ 262,500 | \$ 168,750 | \$ 231,250 | \$ 75,000 |
| Regulatory Compliance - (NL) | \$ 75,154 | \$ 75,674 | \$ 34,601 | \$ 78,356 | \$ 78,967 | \$ 36,433 |
| Regulatory Compliance - (Labor) | \$ 485,818 | \$ 500,575 | \$ 515,323 | \$ 530,178 | \$ 545,320 | \$ 560,687 |
| Total Regulatory Compliance | \$ 560,972 | \$ 576,249 | \$ 549,924 | \$ 608,534 | \$ 624,287 | \$ 597,120 |
| CAMF Whole Building Program | | \$ 4,000,000 | \$ 4,000,000 | \$ 4,000,000 | \$ 4,000,000 | \$ 4,000,000 |
| General Administration - (NL) | \$ 2,058,342 | \$ 1,597,939 | \$ 1,975,649 | \$ 2,001,191 | \$ 2,028,027 | \$ 2,054,270 |
| General Administration - (Labor) | \$ 6,048,512 | \$ 6,535,289 | \$ 6,722,532 | \$ 6,911,139 | \$ 7,108,530 | \$ 7,308,853 |
| Total General Administration | \$ 8,106,854 | \$ 8,133,228 | \$ 8,698,181 | \$ 8,912,330 | \$ 9,136,557 | \$ 9,363,122 |
| CPUC Energy Division | \$ 107,500 | \$ 110,725 | \$ 114,047 | \$ 117,468 | \$ 120,992 | \$ 124,622 |
| TOTAL PROGRAM COSTS | \$ 131,525,600 | \$ 136,493,798 | \$ 136,514,861 | \$ 136,519,523 | \$ 136,549,364 | \$ 136,214,997 |

SOUTHERN CALIFORNIA GAS COMPANY
ENERGY SAVINGS ASSISTANCE AND CALIFORNIA ALTERNATE RATES FOR
ENERGY PROGRAMS & BUDGETS FOR PROGRAM YEARS 2021-2026

(A.19-11-006)
 (DATA REQUEST CALADVOCATES-ESA-CARE-KS6-SCG06)

RECEIVED: MARCH 23, 2020

SUBMITTED: APRIL 6, 2020

| PY 2021-2026 SoCalGas CARE Program Budgets | | | | | | |
|---|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Program Budget Category | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 |
| Marketing and Outreach - (NL) | \$ 4,524,591 | \$ 4,594,799 | \$ 4,673,976 | \$ 4,757,665 | \$ 4,840,114 | \$ 4,921,383 |
| Marketing and Outreach - (Labor) | \$ 672,518 | \$ 701,632 | \$ 722,208 | \$ 742,935 | \$ 764,154 | \$ 785,688 |
| Total Marketing and Outreach | \$ 5,197,109 | \$ 5,296,431 | \$ 5,396,184 | \$ 5,500,599 | \$ 5,604,267 | \$ 5,707,071 |
| Proc Cert & Re-certification - (NL) | \$ 448,664 | \$ 455,625 | \$ 463,477 | \$ 471,775 | \$ 479,951 | \$ 488,010 |
| Proc Cert & Re-certification - (Labor) | \$ 1,663,098 | \$ 1,728,989 | \$ 1,775,559 | \$ 1,822,468 | \$ 1,874,520 | \$ 1,927,345 |
| Total Proc Cert & Re-certification | \$ 2,111,761 | \$ 2,184,615 | \$ 2,239,036 | \$ 2,294,243 | \$ 2,354,471 | \$ 2,415,355 |
| Post Enrollment Verification - (NL) | \$ 231,637 | \$ 241,043 | \$ 247,690 | \$ 254,386 | \$ 261,652 | \$ 269,025 |
| Post Enrollment Verification - (Labor) | | | | | | |
| Total Post Enrollment Verification | \$ 231,637 | \$ 241,043 | \$ 247,690 | \$ 254,386 | \$ 261,652 | \$ 269,025 |
| I.T. Programming - (NL) | \$ 407,249 | \$ 413,569 | \$ 420,695 | \$ 428,228 | \$ 435,649 | \$ 442,964 |
| I.T. Programming - (Labor) | \$ 623,255 | \$ 650,366 | \$ 669,527 | \$ 688,827 | \$ 708,501 | \$ 728,467 |
| Total I.T. Programming | \$ 1,030,505 | \$ 1,063,935 | \$ 1,090,222 | \$ 1,117,055 | \$ 1,144,150 | \$ 1,171,431 |
| Energy Efficiency TOTAL | \$ 8,571,012 | \$ 8,786,023 | \$ 8,973,132 | \$ 9,166,284 | \$ 9,364,540 | \$ 9,562,882 |
| Pilots/CHANGES | \$ 437,502 | \$ 437,502 | \$ 437,502 | \$ 437,502 | \$ 437,502 | \$ 437,502 |
| Measurement and Evaluation | \$ 18,750 | \$ 62,500 | | | \$ 62,500 | \$ - |
| Regulatory Compliance - (NL) | \$ 72,628 | \$ 73,109 | \$ 31,992 | \$ 75,700 | \$ 76,264 | \$ 33,685 |
| Regulatory Compliance - (Labor) | \$ 612,804 | \$ 537,228 | \$ 517,975 | \$ 532,906 | \$ 548,127 | \$ 563,573 |
| Total Regulatory Compliance | \$ 685,432 | \$ 610,337 | \$ 549,966 | \$ 608,606 | \$ 624,391 | \$ 597,258 |
| M&E Studies | | | | | | \$ - |
| General Administration - (NL) | \$ 210,055 | \$ 212,577 | \$ 215,295 | \$ 218,132 | \$ 220,988 | \$ 223,866 |
| General Administration - (Labor) | \$ 861,911 | \$ 899,403 | \$ 925,900 | \$ 952,591 | \$ 979,798 | \$ 1,007,410 |
| Total General Administration | \$ 1,071,966 | \$ 1,111,980 | \$ 1,141,195 | \$ 1,170,723 | \$ 1,200,786 | \$ 1,231,275 |
| CPUC Energy Division | \$ 75,000 | \$ 77,250 | \$ 79,568 | \$ 81,955 | \$ 84,413 | \$ 86,946 |
| SUBTOTAL MANAGEMENT COSTS | \$ 10,859,663 | \$ 11,085,592 | \$ 11,181,364 | \$ 11,465,069 | \$ 11,774,132 | \$ 11,915,864 |
| Subsidies and Benefits | \$ 138,389,984 | \$ 139,583,569 | \$ 140,801,916 | \$ 142,032,348 | \$ 143,264,981 | \$ 144,495,405 |
| TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS | \$ 149,249,646 | \$ 150,669,161 | \$ 151,983,280 | \$ 153,497,417 | \$ 155,039,114 | \$ 156,411,268 |



DR #6 Ques18
 ESA-CARE BudTbIs -