

**APPENDIX B**

**(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 B**

### **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 Appendix 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 Appendix D.

**3. Staffing needs by department/organization, including current and forecast for ~~2018~~ 2022-2023, as well as a description of what changes are expected ~~in the near term (2022-2023)~~ between 2024-2027 or why it's impossible to predict beyond ~~2022~~ 2024, if that's the PA's position.**

### **PA Response :**

Please reference Appendix A of AL5898 for SCG's forecasted labor assumptions for 2022 and 2023, by function. Similarly, please reference Attachment A of this application for forecasted labor assumptions for 2024-2027. As shown in AL5898 and this Application, SoCalGas is forecasting FTEs to decrease over time with the primary driver being 60% third-party target. Actual resource requirements may vary from forecast due to various reasons such the actual performance of third parties or regulatory policy changes.

**4. Non-program functions currently performed by contractors (e.g. advisory consultants), as well as a description of what changes are expected ~~in the near term (2022-2023)~~ between 2024-2027 or why it's impossible to predict beyond ~~2022-2024~~, 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.

**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 :**

Please see Forecasting Methodology section of the Portfolio Plan.

**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 ~~2016 or 2017~~ 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 ~~2018-2024~~.**

- 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 :**

*[Response provide in Attachment A – Table 10 Portfolio FTE]*

Please see the information provided in Appendix A, Table 10: Portfolio FTE.

**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 Appendix A: Tables 9 Portfolio Summary, Tables 11 through 16 Sector Budget details).

**9. Identify any capital costs**

**PA Response :**

There are no capital costs included in SoCalGas' 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	1,182	19
4	Process Improvements	400	6
5	Total	6,324	100

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

**PA Response :**

SoCalGas does not forecast EE budgets in the manner prepared in PG&E's General Rate Case (GRC). SoCalGas' forecasted EE budgets are based on the Commission's various categories of costs for EE, such as Segment, Sector, and Cost Category. Please see Appendix A for SoCalGas' EE costs by these categories.

**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 (SAP), 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 to corresponding EE internal order numbers. 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. Employees are instructed to limit use of EE internal order numbers to work supporting the EE portfolio. EE internal order numbers are linked the EE Demand Side Management Balancing Account and State Wide Energy Efficiency 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 PG&E's 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 :**

*[Response provide in Attachment A – Table 7]*

Please see Appendix A, Table 9: Portfolio Summary

**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 :**

*[Response provide in Attachment A – Tables 11 through 16]*

Please see Appendix A, Table 11 through 16

**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 :**

Please see Forecast Methodology section in the Portfolio Plan (Exhibit 02).

**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 :**

*[Response provide in Attachment A – Table 6 Statewide Programs. Current Solicitation schedule is available at (provide website)]*

Please see Appendix A, Table 6: Statewide Programs for budget information.

Please see EX02 Table 64: Anticipated Solicitations Schedule in the Portfolio Plan (Exhibit 02). As described in SoCalGas' Portfolio 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.

**APPENDIX C**  
**Program Card Index**

<b>Program ID   Program Name</b>	<b>Segment</b>	<b>Card #</b>
<b>Residential</b>		
SCG3701   RES-Energy Advisor Program	Market Support	01
SCG3702   RES-Residential Energy Efficiency Program	Resource Acquisition	02
SCG3705   RES-Multifamily Whole Building Program (Equity)	Equity	03
SCG3824   RES-Residential Behavioral Program	Resource Acquisition	04
SCG3829   RES-Marketplace	Market Support	05
SCG3831   RES-EE Kit Delivery Program	Resource Acquisition	06
SCG3832   RES-Pasadena Water & Power Home Upgrade Program	Resource Acquisition	07
SCG3833   RES-Burbank Water & Power Home Upgrade Program	Resource Acquisition	08
SCG3861   RES-Community Language Efficiency Outreach Program	Equity	09
SCG3883   RES-Residential Advanced Clean Energy (Resource Acquisition)	Resource Acquisition	10
SCG3884   RES-Comprehensive Mobile Home Program	Equity	11
SCG3885   RES-Residential Mobile Home Program	Equity	12
SCG3888   RES-Multifamily Space and Water Heating Controls Program	Resource Acquisition	13
SCG3889   RES-Multifamily Energy Alliance Program (Resource Acquisition)	Resource Acquisition	14
SCG3935   RES-Residential Advanced Clean Energy Program (Equity)	Equity	15
SCG3936   RES-Multifamily Energy Alliance Program (Equity)	Equity	16
SCG3938   RES-Multifamily Whole Building Program (Resource Acquisition)	Resource Acquisition	17
<b>Commercial</b>		
SCG_SW_FS   COM-SW-Point of Sale Food Service Program	Resource Acquisition	18
SCG_SW_MCWH   COM-SW-Midstream Commercial Water Heating Program	Resource Acquisition	19
SCG3771   SOL-IDEEA365 (new IDEEA365 solicitations)	Market Support	20
SCG3834   COM-LADWP Direct Install Program	Resource Acquisition	21
SCG3882   COM-Small and Medium Commercial EE Program (Resource Acquisition)	Resource Acquisition	22
SCG3887   COM-Commercial-BEST (Resource Acquisition)	Resource Acquisition	23
SCG3891   COM-Service RCx Large Commercial Program	Resource Acquisition	24
SCG3892   COM-Large Commercial Energy Efficiency Program	Resource Acquisition	25
SCG3909   CC-Nonresidential Energy Advisor Program	Market Support	26
SCG3910   CC-Nonresidential Calculated Incentive Program	Resource Acquisition	27
SCG3911   CC-Nonresidential Deemed Incentive Program	Resource Acquisition	28
SCG3937   COM-Small and Medium Commercial EE Program (Equity)	Resource Acquisition	29
SCG3940   COM-Commercial-BEST (Equity)	Resource Acquisition	30
<b>Industrial</b>		
SCG3714   IND-Strategic Energy Management	Resource Acquisition	31
<b>Agricultural</b>		
SCG3890   AG-Agricultural Energy Efficiency Program	Resource Acquisition	32
<b>Public</b>		
SCG3886   PUB-Public Direct Install Program	Resource Acquisition	33
SCG3912   PUB-Regional Energy Pathways	Market Support	34
<b>Cross Cutting</b>		
SCG_SW_ETP_Gas   ET-SW-Gas Emerging Technologies Program	Market Support	35
SCG3729   WET&O-Integrated Energy Efficiency Training Program	Market Support	36
SCG3760   WET&O-HERS Rater Training Program	Market Support	37
SCG3764   WET&O-Educational Outreach Program	Resource Acquisition	38
SCG3830   WET&O-Retail Partner Training Program	Market Support	39
SCG3735   FIN-On-Bill Financing	Market Support	40

<b>Program ID:</b>	<b>SCG3701</b>	<b>Card # 01</b>
<b>Program Name:</b>	<b>RES-Energy Advisor Program</b>	
<b>Implementation Plan:</b>	<a href="https://cedars.sound-data.com/documents/download/2131/main/">https://cedars.sound-data.com/documents/download/2131/main/</a>	
<b>Portfolio Segment:</b>	Market Support	<b>Implementation Party:</b> Core PA
<b>Applicable Sector:</b>	Residential	<b>Market Sub-Sector:</b> Multi-Sub-Sector
<b>Sector Challenge:</b>	Lack of awareness of program offerings and services.	<b>Sector Opportunity:</b> Increased customer awareness on the availability and access to both statewide and local offerings.
<b>Known Equity Concerns in the Selected Markets:</b>	Outreach to HTR and DAC customers about energy efficiency programs and solutions.	<b>Proposed Solutions to Equity Concerns:</b> Ensure all customers are aware of SoCalGas' Ways to Save tools include HTR and DAC customers.
<b>Program Description:</b>		
This program continues to help customers understand and empower them to manage their energy use, and will guide them, where appropriate, towards advancing customers to energy efficiency solutions. This includes online short surveys, online full audits, tailored energy efficiency solutions, programs, and tips through SoCalGas' Ways to Save tools.		
<b>Intervention Strategies:</b>	Energy Audits: Online Audits Intelligent Outreach: Customer Outreach & Awareness Intelligent Outreach: Data Analytics & Customer Targeting	<b>Program Metrics:</b> Percentage of Energy Advisor participants that enroll apply for rebate and/or enroll in an energy efficiency program.
<b>High-level description of delivery workforce including necessary scale and its risks:</b>		
Utilize data analytics to target customers not participating in the program. The risk could include downtimes of the Energy Advisor when updates to improve the tools are necessary and customers are unable to use the tools.		
<b>Market Actors necessary for success:</b>		
Not applicable		
<b>Transition Plan:</b>	Not applicable	<b>Solicitation Strategy:</b> Core PA
		<b>Expected Program Life:</b> 2024 - Ongoing
		<b>Cost Effectiveness:</b> Not applicable
<b>Short Term Plan:</b>	Continue to improve on Energy Advisor online survey questions for increased customer engagement.	<b>Long Term Outlook:</b> Cross promote Energy Advisor Program in other energy efficiency programs and vice versa.
<b>Proposed Annual Budgets for 2024-2027:</b>		<b>Anticipated changes in budget for years 2028-2031:</b>
2024: \$504,176	2025: \$511,800	Consistent with portfolio trend.
2026: \$521,201	2027: \$521,201	

<b>Program ID:</b>	<b>SCG3702</b>	<b>Card # 02</b>
<b>Program Name:</b>	<b>RES-Residential Energy Efficiency Program</b>	
<b>Implementation Plan:</b>	<a href="https://cedars.sound-data.com/documents/download/2144/main/">https://cedars.sound-data.com/documents/download/2144/main/</a>	
<b>Portfolio Segment:</b>	Resource Acquisition	<b>Implementation Party:</b> Core PA
<b>Applicable Sector:</b>	Residential	<b>Market Sub-Sector:</b> Multi-Sub-Sector
<b>Sector Challenge:</b>	<b>Sector Opportunity:</b>	
Lack of awareness of program offerings and services.	Increased customer awareness on the availability and access to both statewide and local offerings.	
<b>Known Equity Concerns in the Selected Markets:</b>		<b>Proposed Solutions to Equity Concerns:</b>
Provide energy efficiency solutions and increase adoption of energy efficiency natural gas equipment and products among HTR and DAC customers.		Cross promote other programs to provide the most comprehensive energy efficiency solutions that deliver maximum energy savings for HTR and DAC customers.
<b>Program Description:</b>		
The Residential Energy Efficiency program (REEP) is a deemed, downstream equipment/product rebate program that offers incentives for the purchase and installation of the most energy efficient, natural gas equipment. The Home Energy Efficiency Rebate Program (HEER) component of REEP offers single family residential customers energy efficiency rebate incentives that encourages and aids customers to make energy efficient choices when purchasing appliances. The Multifamily Energy Efficiency Rebates Program (MFEER) component of REEP encourages multifamily property owners and managers to make energy efficient improvements when upgrading their properties. The Energy Efficient New Homes Program (EENH) component of REEP delivers EE solutions to for residential new construction and encourages the use of EE equipment to improve the homes energy savings over the requirements of CA Title 24.		
<b>Intervention Strategies:</b>		<b>Program Metrics:</b>
Customer Incentive: Deemed Incentives		Energy Savings, Total System Benefit, Cost-Effectiveness,
Online Marketplace		GHG Reduction, Participation from most underserved
Intelligent Outreach: Single Point-of-Contact		subsegments including DAC and HTR
<b>High-level description of delivery workforce including necessary scale and its risks:</b>		
Program information is distributed and participation is achieved through a support network of program staff and activities: Marketing campaigns, third-party implementers and other programs (e.g., Marketplace) promote the program.		
<b>Market Actors necessary for success:</b>		
Work with Energy Centers to design and develop relevant training for retailers and contractors. In addition, work with the training staff to identify necessary training to support Workforce of the future. Educate trade allies and have them act as “ambassadors” for the rebates and create awareness among customers.		
<b>Transition Plan:</b>	<b>Solicitation Strategy:</b>	Core PA
Not applicable	<b>Expected Program Life:</b>	2024 - Ongoing
	<b>Cost Effectiveness:</b>	TRC = 0.31; PAC = 0.52
<b>Short Term Plan:</b>		<b>Long Term Outlook:</b>
Work with other programs and IOU’s to develop an integrated marketing plan for all Californians; create partnerships and engage private industry to help motivate consumer and business action.		Deliver comprehensive EE solutions to meet individual and portfolio wide capital improvement needs in order to consistently move customers to a deeper whole-building interventions.
<b>Proposed Annual Budgets for 2024-2027:</b>		<b>Anticipated changes in budget for years 2028-2031:</b>
2024: \$16,778,143	2025: \$17,460,410	Consistent with portfolio trend.
2026: \$17,817,458	2027: \$17,817,458	

<b>Program ID:</b>	<b>SCG3705</b>	<b>Card # 03</b>
<b>Program Name:</b>	<b>RES-Multifamily Whole Building Program (Equity)</b>	
<b>Implementation Plan:</b>	<a href="https://cedars.sound-data.com/documents/download/2153/main/">https://cedars.sound-data.com/documents/download/2153/main/</a>	
<b>Portfolio Segment:</b>	Equity	<b>Implementation Party:</b> Local Third Party
<b>Applicable Sector:</b>	Residential	<b>Market Sub-Sector:</b> Residential Multi-family
<b>Sector Challenge:</b>	Low participation across the residential sector, especially in the equity-classified customer groups.	<b>Sector Opportunity:</b> Increased customer adoption of gas energy efficiency solutions, including behavioral-related actions, across all residential segments, especially within equity-classified customer groups.
<b>Known Equity Concerns in the Selected Markets:</b>	Ability to provide energy efficiency solutions to HTR and DAC customers.	<b>Proposed Solutions to Equity Concerns:</b> Offering additional incentives for property owners for HTR and DAC properties.; Establishing a direct install approach for a certain set of measures which will remove some of the challenges for customers to consider when deciding if they should proceed with a comprehensive project.
<b>Program Description:</b>		
The Multifamily Whole Building Program aims to deliver comprehensive EE upgrades tailored to the needs of existing multifamily dwellings and their owners, tenants and management companies. The Program seeks to promote long-term energy benefits through comprehensive whole building energy efficiency retrofit measures including building shell upgrades, high-efficiency HVAC units, central heating and cooling systems, central domestic hot water heating and other deep energy reduction opportunities. These EE measures would be identified through an investment grade assessment. The Program will coordinate with the ESA Program and other energy efficiency programs to present a singular and streamlined approach for multifamily tenants, property owners and property managers.		
<b>Intervention Strategies:</b>		<b>Program Metrics:</b>
Customer Incentives: Bundled Measures Energy Audits & Technical Assistance Financing & Alternative Funding		DAC and HTR Enrollment, Energy Savings, Total System Benefit, GHG Reduction, Depth of Intervention
<b>High-level description of delivery workforce including necessary scale and its risks:</b>		
Program information is distributed and participation is achieved through a support network of program activities: Account executives, Single Point of Contact, third-party implementer and knowledgeable trade allies promote the program through events such as: webinars, email blasts, etc.		
<b>Market Actors necessary for success:</b>		
Account Executives, Single Point of Contact, coordination with third-party implementers, and industry trade allies learning and advocating for the program experience.		
<b>Transition Plan:</b>	<b>Solicitation Strategy:</b>	Local Third Party
Program to be solicited in 2022.	<b>Expected Program Life:</b>	2024 - Ongoing
	<b>Cost Effectiveness:</b>	TRC = 0.39; PAC = 0.53
<b>Short Term Plan:</b>	<b>Long Term Outlook:</b>	
Continue to work with industry trade allies to create awareness and participation within HTR customers and DACs.	Encourage customers to bring in additional projects in their portfolio to conduct further upgrades with a high level of comfort and trust in the program process.	
<b>Proposed Annual Budgets for 2024-2027*:</b>		<b>Anticipated changes in budget for years 2028-2031:</b>
2024: \$5,301,395	2025: \$5,309,426	Consistent with portfolio trend.
2026: \$5,316,022	2027: \$5,316,022	

*\*The inclusion of annual budgets does not imply or guarantee that the current third party's contract will be extended.*

<b>Program ID:</b>	<b>SCG3824</b>	<b>Card # 04</b>	
<b>Program Name:</b>	<b>RES-Residential Behavioral Program</b>		
<b>Implementation Plan:</b>	<a href="https://cedars.sound-data.com/documents/download/2164/main/">https://cedars.sound-data.com/documents/download/2164/main/</a>		
<b>Portfolio Segment:</b>	Resource Acquisition	<b>Implementation Party:</b>	Local Third Party
<b>Applicable Sector:</b>	Residential	<b>Market Sub-Sector:</b>	Residential Single Family
<b>Sector Challenge:</b>	<b>Sector Opportunity:</b>		
Low participation across the residential sector, especially in the equity-classified customer groups.	Increased customer adoption of gas energy efficiency solutions, including behavioral-related actions, across all residential segments, especially within equity-classified customer groups.		
<b>Known Equity Concerns in the Selected Markets:</b>	<b>Proposed Solutions to Equity Concerns:</b>		
Ability and reach to provide energy efficiency solutions to HTR and DAC customers.	Provide Home Energy Reports to HTR and DAC customers that allows customers to manage their energy usage and provide information on other energy efficiency programs.		
<b>Program Description:</b>			
This program offers behavior intervention strategies to residential participants to achieve short-term energy and budget savings that can persist and produce long-term behavior change and energy savings. This is achieved by fostering participant engagement, ensuring participant satisfaction, and providing energy education and upgrades through regular and participant-specific touchpoints in the form of Home Energy Reports (HERs) and a web-based education portal.			
<b>Intervention Strategies:</b>		<b>Program Metrics:</b>	
Behavioral Awareness: Home Energy Reports		Energy Savings, Total System Benefit, Cost-Effectiveness, GHG Reduction	
Intelligent Outreach: Customer Targeting			
Intelligent Outreach: Data Analytics			
<b>High-level description of delivery workforce including necessary scale and its risks:</b>			
Third party implementers deliver Home Energy Reports to treatment waves. Missing high season for energy savings and data mis-match can hamper results.			
<b>Market Actors necessary for success:</b>			
Program Administrators, Third-party implementers.			
<b>Transition Plan:</b>	<b>Solicitation Strategy:</b>		Local Third Party
Not applicable	<b>Expected Program Life:</b>		2024 - Ongoing
	<b>Cost Effectiveness:</b>		TRC = 2.20; PAC = 2.20
<b>Short Term Plan:</b>	<b>Long Term Outlook:</b>		
Optimize program to drive higher savings and mitigate customer fatigue and wear-out.	Cross promote other energy efficiency programs, drive program participation and evolve program into next generation.		
<b>Proposed Annual Budgets for 2024-2027*:</b>		<b>Anticipated changes in budget for years 2028-2031:</b>	
2024: \$4,925,951	2025: \$4,951,554	Consistent with portfolio trend.	
2026: \$4,977,641	2027: \$4,977,641		

*\*The inclusion of annual budgets does not imply or guarantee that the current third party's contract will be extended.*

<b>Program ID:</b>	<b>SCG3829</b>	<b>Card # 05</b>	
<b>Program Name:</b>	<b>RES-Marketplace</b>		
<b>Implementation Plan:</b>	<a href="https://cedars.sound-data.com/documents/download/1203/main/">https://cedars.sound-data.com/documents/download/1203/main/</a>		
<b>Portfolio Segment:</b>	Market Support	<b>Implementation Party:</b>	Local Third Party
<b>Applicable Sector:</b>	Residential	<b>Market Sub-Sector:</b>	Residential Single Family
<b>Sector Challenge:</b>	<b>Sector Opportunity:</b>		
Communication barriers exist between retailers/contractors and customers leading to information on energy efficiency programs and products not being presented effectively to customers.	More ongoing communication and updates to the retailers on qualifying equipment and rebate offerings that are presented to customers in an effective manner.		
<b>Known Equity Concerns in the Selected Markets:</b>	<b>Proposed Solutions to Equity Concerns:</b>		
Energy efficiency equipment information and solutions are not readily available to HTR and DAC customers.	Provide online energy efficiency information solutions platform to HTR and DAC customers.		

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**Program Description:**

Online marketplace platform which provides energy efficiency information as well as utility program information to customers. The platform also provides rebates at point-of-purchase and also provides micro-loan financing options for customers as well.

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**Intervention Strategies:**

Online Marketplace: Website  
 Online Marketplace: Micro-loans  
 Customer Incentives: Deemed Incentives

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**Program Metrics:**

Market Support Demand and Supply Metrics

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**High-level description of delivery workforce including necessary scale and its risks:**

Third party implementer delivery high quality marketplace website that is easy to navigate, obtain information, and purchase energy efficiency products.

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**Market Actors necessary for success:**

Third-party implementer, web developers, partnerships with retailers, partnerships with financial institutions.

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**Transition Plan:**

Not applicable

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**Solicitation Strategy:**

Local Third Party

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**Expected Program Life:**

2024 - Ongoing

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**Cost Effectiveness:**

TRC = 0.42; PAC = 0.57

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**Short Term Plan:**

Enhance web pages and provide more eligible rebates and financing options to customers at the point-of-purchase.

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**Long Term Outlook:**

One stop shop for customers seeking energy efficiency information, financing, and potentially installation services. Include other clean energy technologies as well.

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**Proposed Annual Budgets for 2024-2027\*:**

2024: \$3,172,408	2025: \$3,176,646
2026: \$3,180,060	2027: \$3,180,060

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**Anticipated changes in budget for years 2028-2031:**

Consistent with portfolio trend.

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<b>Program ID:</b>	<b>SCG3831</b>	<b>Card # 06</b>	
<b>Program Name:</b>	<b>RES-EE Kit Delivery Program</b>		
<b>Implementation Plan:</b>	<a href="https://cedars.sound-data.com/documents/download/2205/main/">https://cedars.sound-data.com/documents/download/2205/main/</a>		
<b>Portfolio Segment:</b>	Resource Acquisition	<b>Implementation Party:</b>	Local Third Party
<b>Applicable Sector:</b>	Residential	<b>Market Sub-Sector:</b>	Residential Single Family
<b>Sector Challenge:</b>	<b>Sector Opportunity:</b>		
Lack of awareness of program offerings and services.	Increased customer awareness on the availability and access to both statewide and local offerings.		

<b>Known Equity Concerns in the Selected Markets:</b>	<b>Proposed Solutions to Equity Concerns:</b>
Low participation across the residential sector, especially in the equity-classified customer groups.	Cross promote with other programs to provide energy efficiency to HTR and DAC customers.

**Program Description:**  
This program offers an "energy saving starter kit" to customers to introduce them to energy efficiency measures and tips that can produce energy savings at no cost. The kits provide information about simple but comprehensive methods to reduce water and natural gas. By supplying the tools necessary to begin saving natural gas and water and thereby educating these customers on energy efficiency. As applicable, participants will also be educated about additional opportunities for energy efficiency beyond the no cost measures they are adopting.

<b>Intervention Strategies:</b>	<b>Program Metrics:</b>
Partnering: Public Agencies and Municipalities Education & Training Customer Incentives: Kits at no-cost	Energy Savings, Total System Benefit, Cost-Effectiveness, GHG Reduction

**High-level description of delivery workforce including necessary scale and its risks:**  
Third party implementers package and ship energy efficiency kits to customers.

**Market Actors necessary for success:**  
Program Administrators, POU, water agencies, third-party contractor.

<b>Transition Plan:</b>	<b>Solicitation Strategy:</b>	Local Third Party
Program to be solicited in 2022.	<b>Expected Program Life:</b>	2024 - Ongoing
	<b>Cost Effectiveness:</b>	TRC = 1.18; PAC = 1.18
<b>Short Term Plan:</b>	<b>Long Term Outlook:</b>	
Work with POU and water districts to promote kits and educate customers on energy efficiency.	Provide additional energy savings opportunities through additional measures and education.	

<b>Proposed Annual Budgets for 2024-2027*:</b>	<b>Anticipated changes in budget for years 2028-2031:</b>
2024: \$200,656      2025: \$201,722	Consistent with portfolio trend.
2026: \$202,862      2027: \$202,862	

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<b>Program ID:</b>	<b>SCG3832</b>	<b>Card # 07</b>
<b>Program Name:</b>	<b>RES-Pasadena Water &amp; Power Home Upgrade Program</b>	
<b>Implementation Plan:</b>	<a href="https://cedars.sound-data.com/documents/download/2150/main/">https://cedars.sound-data.com/documents/download/2150/main/</a>	
<b>Portfolio Segment:</b>	Resource Acquisition	<b>Implementation Party:</b> Local Third Party
<b>Applicable Sector:</b>	Residential	<b>Market Sub-Sector:</b> Residential Single Family
<b>Sector Challenge:</b>	<b>Sector Opportunity:</b>	
Deeper, more comprehensive EE solutions are too costly for customers, and cost effectiveness is difficult to attain due to the high first cost.	Increased customer adoption of deeper, more comprehensive energy efficient solution.	
<b>Known Equity Concerns in the Selected Markets:</b>	<b>Proposed Solutions to Equity Concerns:</b>	
Ability to provide energy efficiency solutions to HTR and DAC customers.	Provide energy efficiency solutions to HTR and DAC customers through direct install measures and co-pay opportunities for deeper savings measures.	
<b>Program Description:</b>		
The program is a direct install program that offers a variety of energy efficiency services to residential customers residing or owning homes in the City of Pasadena and served by SoCalGas and Pasadena Water and Power (PWP). The program is designed to increase the rate at which SoCalGas and PWP customers implement energy efficiency measures. Services include in-home energy and water efficiency survey and weatherization services. A participant in the program can have energy and water savings measures installed at no cost.		
<b>Intervention Strategies:</b>		<b>Program Metrics:</b>
Partnering: Public Agencies and Municipalities		Energy Savings, Total System Benefit, Cost-Effectiveness, GHG Reduction
Direct Install: Standard Direct Install		
Energy Audits		
<b>High-level description of delivery workforce including necessary scale and its risks:</b>		
PWP and third party implementer.		
<b>Market Actors necessary for success:</b>		
Program Administrators, POU staff, third-party contractor.		
<b>Transition Plan:</b>	<b>Solicitation Strategy:</b>	Local Third Party
Not applicable	<b>Expected Program Life:</b>	2024 - Ongoing
	<b>Cost Effectiveness:</b>	TRC = 1.05; PAC = 1.63
<b>Short Term Plan:</b>	<b>Long Term Outlook:</b>	
Continue to collaborate to offer comprehensive energy savings to joint customers.	The longer-term strategy will be to encourage greater adoption of more efficient whole house energy efficiency solutions.	
<b>Proposed Annual Budgets for 2024-2027*:</b>		<b>Anticipated changes in budget for years 2028-2031:</b>
2024: \$530,213	2025: \$532,219	Consistent with portfolio trend.
2026: \$534,229	2027: \$534,229	

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<b>Program ID:</b>	<b>SCG3833</b>	<b>Card # 08</b>
<b>Program Name:</b>	<b>RES-Burbank Water &amp; Power Home Upgrade Program</b>	
<b>Implementation Plan:</b>	<a href="https://cedars.sound-data.com/documents/download/2149/main/">https://cedars.sound-data.com/documents/download/2149/main/</a>	
<b>Portfolio Segment:</b>	Resource Acquisition	<b>Implementation Party:</b> Local Third Party
<b>Applicable Sector:</b>	Residential	<b>Market Sub-Sector:</b> Residential Single Family
<b>Sector Challenge:</b>	<b>Sector Opportunity:</b>	
Deeper, more comprehensive EE solutions are too costly for customers, and cost effectiveness is difficult to attain due to the high first cost.	Increased customer adoption of deeper, more comprehensive energy efficient solution.	
<b>Known Equity Concerns in the Selected Markets:</b>	<b>Proposed Solutions to Equity Concerns:</b>	
Ability to provide energy efficiency solutions to HTR and DAC customers.	Provide energy efficiency solutions to HTR and DAC customers through direct install measures and co-pay opportunities for deeper savings measures.	
<b>Program Description:</b>		
This program is made possible by the joint partnership between the City of Burbank (BWP) and SoCalGas. SoCalGas and BWP jointly implement, within shared SoCalGas and City territory, the installation of eligible and feasible water and energy saving measures. BWP implements, manages, and administers contracting of installer and is responsible for administering day-to-day coordinating with the other Parties. The program is designed to reach more residential customers, promote deeper energy efficiency, simplify customer engagement and reduce costs through a cost-sharing partner model.		
<b>Intervention Strategies:</b>		<b>Program Metrics:</b>
Partnering: Public Agencies and Municipalities		Energy Savings, Total System Benefit, Cost-Effectiveness,
Direct Install: Standard Direct Install		GHG Reduction
Energy Audits		
<b>High-level description of delivery workforce including necessary scale and its risks:</b>		
BWP and third party implementer.		
<b>Market Actors necessary for success:</b>		
Program Administrators, POU staff, third party contractor.		
<b>Transition Plan:</b>	<b>Solicitation Strategy:</b>	Local Third Party
Not applicable	<b>Expected Program Life:</b>	2024 - Ongoing
	<b>Cost Effectiveness:</b>	TRC = 1.01; PAC = 1.52
<b>Short Term Plan:</b>	<b>Long Term Outlook:</b>	
Continue to collaborate to offer comprehensive energy savings to joint customers.	The longer-term strategy will be to encourage greater adoption of more efficient whole house energy efficiency solutions.	
<b>Proposed Annual Budgets for 2024-2027*:</b>		<b>Anticipated changes in budget for years 2028-2031:</b>
2024: \$404,704	2025: \$406,619	Consistent with portfolio trend.
2026: \$408,584	2027: \$408,584	

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<b>Program ID:</b>	<b>SCG3861</b>	<b>Card # 09</b>
<b>Program Name:</b>	<b>RES-Community Language Efficiency Outreach Program</b>	
<b>Implementation Plan:</b>	<a href="https://cedars.sound-data.com/documents/download/2160/main/">https://cedars.sound-data.com/documents/download/2160/main/</a>	
<b>Portfolio Segment:</b>	Equity	<b>Implementation Party:</b> Local Third Party
<b>Applicable Sector:</b>	Residential	<b>Market Sub-Sector:</b> Residential Single Family
<b>Sector Challenge:</b>	Low participation across the residential sector, especially in the equity-classified customer groups.	<b>Sector Opportunity:</b> Increased customer adoption of gas energy efficiency solutions, including behavioral-related actions, across all residential segments, especially within equity-classified customer groups.
<b>Known Equity Concerns in the Selected Markets:</b>	Outreach and customer awareness of energy efficiency solutions to HTR, DAC and underserved customers.	<b>Proposed Solutions to Equity Concerns:</b> Provide energy efficiency solutions to HTR, DAC and underserved customers through direct install measures and co-pay opportunities for deeper savings measures.
<b>Program Description:</b>		
The program provides residential in-language, marketing, education and outreach and direct install of residential more efficient energy efficiency measures, targeting the HTR/DAC Chinese, Vietnamese, Korean, Hispanic and other ethnic communities of Los Angeles and Orange Counties.		
<b>Intervention Strategies:</b>		<b>Program Metrics:</b>
Intelligent Outreach: Customer Outreach & Awareness		DAC and HTR Enrollment and Penetration, Measure
Intelligent Outreach: HTR and DACs		Installations, Energy Savings, Total System Benefit, GHG
Direct Install: Customer Co-Payments		Reduction
<b>High-level description of delivery workforce including necessary scale and its risks:</b>		
Delivery workforce includes third-party implementers and their contractor and outreach network.		
<b>Market Actors necessary for success:</b>		
Third party implementers and their contractors. Outreach activities are critical to program success.		
<b>Transition Plan:</b>	<b>Solicitation Strategy:</b>	Local Third Party
Not applicable	<b>Expected Program Life:</b>	2024 - Ongoing
	<b>Cost Effectiveness:</b>	TRC = 0.42; PAC = 0.42
<b>Short Term Plan:</b>	<b>Long Term Outlook:</b>	
Continue targeting disadvantaged and hard to reach communities including rural and non-English speaking communities.	Educate customers and continue to seek and add new affordable measures to local offerings. Proactively partner with air quality management districts and water agencies.	
<b>Proposed Annual Budgets for 2024-2027*:</b>		<b>Anticipated changes in budget for years 2028-2031:</b>
2024: \$4,808,045	2025: \$4,813,472	Consistent with portfolio trend.
2026: \$4,817,467	2027: \$4,817,467	

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<b>Program ID:</b>	<b>SCG3883</b>	<b>Card # 10</b>
<b>Program Name:</b>	<b>RES-Residential Advanced Clean Energy (Resource Acquisition)</b>	
<b>Implementation Plan:</b>	<a href="https://cedars.sound-data.com/documents/download/1915/main/">https://cedars.sound-data.com/documents/download/1915/main/</a>	
<b>Portfolio Segment:</b>	Resource Acquisition	<b>Implementation Party:</b> Local Third Party
<b>Applicable Sector:</b>	Residential	<b>Market Sub-Sector:</b> Residential Single Family
<b>Sector Challenge:</b>	<b>Sector Opportunity:</b>	
Deeper, more comprehensive EE solutions are too costly for customers, and cost effectiveness is difficult to attain due to the high first cost..	Increased customer adoption of deeper, more comprehensive energy efficient solution.	
<b>Known Equity Concerns in the Selected Markets:</b>	<b>Proposed Solutions to Equity Concerns:</b>	
Ability to provide energy efficiency solutions to HTR and DAC customers.	Provide energy efficiency solutions to single family customers through direct install measures and co-pay opportunities for deeper savings measures.	
<b>Program Description:</b>		
The program is a comprehensive advanced clean energy solution for single family customers. The advanced clean energy path begins with the delivery of cost-effective therm-rich direct install measures that transitions to an advanced clean energy opportunity for the single family customer that can be financed by outside sources. The program is designed with potential to be replicated across residential segments and seeks to be transformational rather than transactional. It will transform the customer into a wiser and knowledgeable steward by instilling behavior to improve their home by reducing carbon footprint and enjoying increased comfort. The program leverages IOU electric, municipal electric, and local agency clean energy single family opportunities offerings, in addition to natural gas clean energy solutions.		
<b>Intervention Strategies:</b>	<b>Program Metrics:</b>	
Direct Install: Customer Co-Payments	DAC and HTR Enrollment, Energy Savings, Total System Benefit, GHG Reduction, Depth of Intervention	
Direct Install: Comprehensive Direct Install		
Financing and Alternative Funding		
<b>High-level description of delivery workforce including necessary scale and its risks:</b>		
Delivery workforce includes third-party implementers and their trade ally network.		
<b>Market Actors necessary for success:</b>		
Program Administrators, Third-Party Program Implementors		
<b>Transition Plan:</b>	<b>Solicitation Strategy:</b>	Local Third Party
Not applicable	<b>Expected Program Life:</b>	2024 - Ongoing
	<b>Cost Effectiveness:</b>	TRC = 0.63; PAC = 0.63
<b>Short Term Plan:</b>	<b>Long Term Outlook:</b>	
Continue to bring gas energy savings to customers by providing no cost measures as well as providing co-pay measures.	Educate customers and continue to seek and add new affordable measures to local offerings that reduce GHG emissions. Proactively partner with air quality management districts and water agencies.	
<b>Proposed Annual Budgets for 2024-2027*:</b>		<b>Anticipated changes in budget for years 2028-2031:</b>
2024: \$2,777,809	2025: \$2,781,760	Consistent with portfolio trend.
2026: \$2,785,033	2027: \$2,785,033	

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<b>Program ID:</b>	<b>SCG3884</b>	<b>Card # 11</b>
<b>Program Name:</b>	<b>RES-Comprehensive Mobile Home Program</b>	
<b>Implementation Plan:</b>	<a href="https://cedars.sound-data.com/documents/download/1930/main/">https://cedars.sound-data.com/documents/download/1930/main/</a>	
<b>Portfolio Segment:</b>	Equity	<b>Implementation Party:</b> Local Third Party
<b>Applicable Sector:</b>	Residential	<b>Market Sub-Sector:</b> Residential Manufactured
<b>Sector Challenge:</b>	Low participation across the residential sector, especially in the equity-classified and underserved customer groups.	<b>Sector Opportunity:</b> Increased customer adoption of gas energy efficiency solutions, including behavioral-related actions, across all residential segments, especially within equity-classified customer groups.
<b>Known Equity Concerns in the Selected Markets:</b>	Ability to provide energy efficiency solutions to HTR, DAC and underserved customers.	<b>Proposed Solutions to Equity Concerns:</b> Provide energy efficiency solutions to HTR, DAC and underserved customers through direct install measures and co-pay opportunities for deeper savings measures.
<b>Program Description:</b>		
The program is a comprehensive advanced clean energy solution for manufactured home customers that reside in Ventura, Los Angeles, Orange, Riverside, San Bernardino, and Imperial Counties. The program strategy encourages deeper energy savings by offering more comprehensive energy efficiency measures. The program path begins with the delivery of cost-effective therm-rich direct install measures that transitions to an advanced clean energy opportunity for the manufactured homes customers that can be financed by outside sources. The program delivers natural gas energy efficiency, clean energy, and carbon emission solutions.		
<b>Intervention Strategies:</b>		<b>Program Metrics:</b>
Direct Install: Customer Co-Payments		DAC and HTR Enrollment, Energy Savings, Total System Benefit, GHG Reduction
Direct Install: Comprehensive Direct Install		
Intelligent Outreach: Single Point of Contact		
<b>High-level description of delivery workforce including necessary scale and its risks:</b>		
Third party implementers and their contractors, installation of energy efficiency measures and technologies.		
<b>Market Actors necessary for success:</b>		
Third-party implementers and their contractors. Outreach activities are critical to program success.		
<b>Transition Plan:</b>	<b>Solicitation Strategy:</b>	Local Third Party
Not applicable	<b>Expected Program Life:</b>	2024 - Ongoing
	<b>Cost Effectiveness:</b>	TRC = 0.61; PAC = 0.61
<b>Short Term Plan:</b>	<b>Long Term Outlook:</b>	
Continue to meet gas energy savings to our customers by providing no cost measures as well as providing copay measures.	Educate customers and continue to seek and add new affordable measures to local offerings. Proactively partner with air quality management districts and water agencies.	
<b>Proposed Annual Budgets for 2024-2027*:</b>		<b>Anticipated changes in budget for years 2028-2031:</b>
2024: \$2,656,417	2025: \$2,660,429	Consistent with portfolio trend.
2026: \$2,663,757	2027: \$2,663,757	

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<b>Program ID:</b>	<b>SCG3885</b>	<b>Card # 12</b>	
<b>Program Name:</b>	<b>RES-Residential Mobile Home Program</b>		
<b>Implementation Plan:</b>	<a href="https://cedars.sound-data.com/documents/download/1931/main/">https://cedars.sound-data.com/documents/download/1931/main/</a>		
<b>Portfolio Segment:</b>	Equity	<b>Implementation Party:</b>	Local Third Party
<b>Applicable Sector:</b>	Residential	<b>Market Sub-Sector:</b>	Residential Manufactured
<b>Sector Challenge:</b>	<b>Sector Opportunity:</b>		
Low participation across the residential sector, especially in the equity-classified and underserved customer groups.	Increased customer adoption of gas energy efficiency solutions, including behavioral-related actions, across all residential segments, especially within equity-classified customer groups.		
<b>Known Equity Concerns in the Selected Markets:</b>	<b>Proposed Solutions to Equity Concerns:</b>		
Ability to provide energy efficiency solutions to HTR, DAC and underserved customers.	Provide energy efficiency solutions to HTR, DAC and underserved customers through direct install measures and co-pay opportunities for deeper savings measures.		
<b>Program Description:</b>			
This program will allow for mobile and manufactured home residents to overcome the historical barriers to energy efficiency by providing access to affordable and no-cost pre-qualified installation and quality retrofits that maximize energy savings at each site by using proven products and technologies. The program further facilitates energy improvements by providing the customer with a package of services through one point of contact. This program also promotes local economic development by employing local staff and helping customers lower their gas bills. The program provides customers with further information on other low-cost and no-cost energy efficiency measures, demand side and other programs that are relevant to customer needs for saving energy.			
<b>Intervention Strategies:</b>		<b>Program Metrics:</b>	
Direct Install: Customer Co-Payments		DAC and HTR Enrollment, Energy Savings, Total System Benefit, GHG Reduction	
Direct Install: Comprehensive Direct Install			
Intelligent Outreach: Single Point of Contact			
<b>High-level description of delivery workforce including necessary scale and its risks:</b>			
Third party implementers and their contractors, installation of energy efficiency measures and technologies.			
<b>Market Actors necessary for success:</b>			
Third-party implementers and their contractors. Outreach activities are critical to program success.			
<b>Transition Plan:</b>	<b>Solicitation Strategy:</b>		Local Third Party
Not applicable	<b>Expected Program Life:</b>		2024 - Ongoing
	<b>Cost Effectiveness:</b>		TRC = 0.49; PAC = 0.49
<b>Short Term Plan:</b>	<b>Long Term Outlook:</b>		
Continue to meet gas energy savings to our customers by providing no cost measures as well as providing copay measures.	Educate customers and continue to seek and add new affordable measures to local offerings. Proactively partner with air quality management districts and water agencies.		
<b>Proposed Annual Budgets for 2024-2027*:</b>		<b>Anticipated changes in budget for years 2028-2031:</b>	
2024: \$1,940,831	2025: \$1,944,324	Consistent with portfolio trend.	
2026: \$1,947,397	2027: \$1,947,397		

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<b>Program ID:</b>	<b>SCG3888</b>	<b>Card # 13</b>	
<b>Program Name:</b>	<b>RES-Multifamily Space and Water Heating Controls Program</b>		
<b>Implementation Plan:</b>	<a href="https://cedars.sound-data.com/documents/download/1943/main/">https://cedars.sound-data.com/documents/download/1943/main/</a>		
<b>Portfolio Segment:</b>	Resource Acquisition	<b>Implementation Party:</b>	Local Third Party
<b>Applicable Sector:</b>	Residential	<b>Market Sub-Sector:</b>	Residential Multifamily
<b>Sector Challenge:</b>	<b>Sector Opportunity:</b>		
Deeper, more comprehensive EE solutions are too costly for customers, and cost effectiveness is difficult to attain due to the high first cost.	Increased customer adoption of deeper, more comprehensive energy efficient solution.		
<b>Known Equity Concerns in the Selected Markets:</b>	<b>Proposed Solutions to Equity Concerns:</b>		
Ability to outreach and provide energy efficiency solutions to HTR and DAC customers.	Provide list of no-cost measures to the targeted customers, including gas, electric, and non-utility sponsors.		
<b>Program Description:</b>			
The program objective is to surmount the dichotomy of split incentives and maximize energy efficiency measure installation in targeted multifamily apartment buildings that have the dual-function (Raydronics) central water heaters (water heating and hydronic space heating) through direct install. The Dual Set Point Controller lowers the storage tank temperature during summer season and during nights when space heating is not required and turns off the summer pump realizing significant energy savings. Program will leverage this effort with the installation of variable frequency drive on the Raydronics system pump which results in additional savings. With these two measures, the program participants can reduce combined natural gas and electricity energy consumption in these types of apartment buildings as much as 15%-20%.			
<b>Intervention Strategies:</b>		<b>Program Metrics:</b>	
Energy Audits		Energy Savings, Total System Benefit, Cost-Effectiveness, GHG Reduction	
Direct Install: Standard Direct Install			
Intelligent Outreach: Customer Targeting			
<b>High-level description of delivery workforce including necessary scale and its risks:</b>			
Third-party implementer and all other persons performing the installations must comply with the workforce qualifications, certifications, standards and requirements as required for these types of installations.			
<b>Market Actors necessary for success:</b>			
Program Administrators, Third-Party Implementors, Property Owners/ Managers and maintenance personnel. Plumbers providing service to properties with these types of systems. Non-utility programs including local government, state agencies and US government agency sponsored programs.			
<b>Transition Plan:</b>		<b>Solicitation Strategy:</b>	
Not applicable		Local Third Party	
		<b>Expected Program Life:</b>	
		2024 - Ongoing	
		<b>Cost Effectiveness:</b>	
		TRC = 0.96; PAC = 0.96	
<b>Short Term Plan:</b>		<b>Long Term Outlook:</b>	
Increased customer adoption of these types of energy efficiency technologies for similar multifamily water and space heating systems.		Provide more energy efficiency measures to provide a comprehensive offering that touches space and water heating as well as other upgrades.	
<b>Proposed Annual Budgets for 2024-2027*:</b>		<b>Anticipated changes in budget for years 2028-2031:</b>	
2024: \$1,019,819	2025: \$1,031,248	Consistent with portfolio trend.	
2026: \$1,043,371	2027: \$1,043,371		

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<b>Program ID:</b>	<b>SCG3889</b>	<b>Card # 14</b>
<b>Program Name:</b>	<b>RES-Multifamily Energy Alliance Program (Resource Aquisition)</b>	
<b>Implementation Plan:</b>	<a href="https://cedars.sound-data.com/documents/download/2007/main/">https://cedars.sound-data.com/documents/download/2007/main/</a>	
<b>Portfolio Segment:</b>	Resource Acquisition	<b>Implementation Party:</b> Local Third Party
<b>Applicable Sector:</b>	Residential	<b>Market Sub-Sector:</b> Residential Multifamily
<b>Sector Challenge:</b>	<b>Sector Opportunity:</b>	
Lack of awareness of program offerings and services.	Increased customer awareness on the availability and access to both statewide and local offerings.	
<b>Known Equity Concerns in the Selected Markets:</b>		
Ability to outreach and provide energy efficiency solutions to HTR and DAC customers.		
<b>Proposed Solutions to Equity Concerns:</b>		
Identify eligible customers; Customer education, marketing, outreach; Energy Audits; Technical assistance to Customers; Financial incentives/rebates; Direct installation of energy and water saving measures and referral to other multifamily programs.		
<b>Program Description:</b>		
The program provides broad outreach and customer screening services for the full suite of SoCalGas Multifamily offerings, and also provides a limited set of measures—both rebated and no-cost direct install—to offer customers who do not qualify for the Energy Savings Assistance Program for Common Area Measures or who are not yet ready to complete larger-scale upgrades through the Multifamily Whole Building program. Using a one-stop-shop approach to working with the multifamily property owner/manager customer segment, the program drives interest in EE upgrades, direct customers to the appropriate program, and provide ongoing outreach and education that encourages customers to continue their energy efficiency journey with SoCalGas through additional program participation options. The program will seek to achieve at least 50 percent participation by HTR and DAC		
<b>Intervention Strategies:</b>		
Direct Install: Standard Direct Install		
Customer Incentives: Deemed & Custom		
Intelligent Outreach: Customer Outreach & Awareness		
<b>Program Metrics:</b>		
Energy Savings, Total System Benefit, Cost-Effectiveness, GHG Reduction, Depth of Intervention		
<b>High-level description of delivery workforce including necessary scale and its risks:</b>		
The program manages project installations through participating trade allies. These trade allies are selected through a thorough evaluation process that includes a documented commitment to providing job access to disadvantaged workers measured by six unique criteria.		
<b>Market Actors necessary for success:</b>		
Multifamily Account Executives and single-point-of-contracts, third-implementer staff, trade allies including contractors, distributors, vendors, professional organizations, etc.		
<b>Transition Plan:</b>	<b>Solicitation Strategy:</b>	Local Third Party
Not applicable	<b>Expected Program Life:</b>	2024 - Ongoing
	<b>Cost Effectiveness:</b>	TRC = 0.49; PAC = 0.63
<b>Short Term Plan:</b>	<b>Long Term Outlook:</b>	
Strengthen program resources and support to continue to promote program offerings to customers and demonstrate ease of participation.	Increased customer adoption of deeper, more comprehensive energy efficient solutions.	
<b>Proposed Annual Budgets for 2024-2027*:</b>		
2024: \$2,173,084	2025: \$2,177,206	<b>Anticipated changes in budget for years 2028-2031:</b> Consistent with portfolio trend.
2026: \$2,180,923	2027: \$2,180,923	

*\*The inclusion of annual budgets does not imply or guarantee that the current third party's contract will be extended.*

<b>Program ID:</b>	<b>SCG3935</b>	<b>Card # 15</b>	
<b>Program Name:</b>	<b>RES-Residential Advanced Clean Energy Program (Equity)</b>		
<b>Implementation Plan:</b>	<a href="https://cedars.sound-data.com/documents/download/2473/main/">https://cedars.sound-data.com/documents/download/2473/main/</a>		
<b>Portfolio Segment:</b>	Equity	<b>Implementation Party:</b>	Local Third Party
<b>Applicable Sector:</b>	Residential	<b>Market Sub-Sector:</b>	Residential Single Family
<b>Sector Challenge:</b>	<b>Sector Opportunity:</b>		
Low participation across the residential sector, especially in the equity-classified customer groups.	Increased customer adoption of gas energy efficiency solutions, including behavioral-related actions, across all residential segments, especially within equity-classified customer groups.		
<b>Known Equity Concerns in the Selected Markets:</b>	<b>Proposed Solutions to Equity Concerns:</b>		
Ability to provide energy efficiency solutions to HTR and DAC customers.	Provide energy efficiency solutions to DAC and HTR customers through direct install measures and co-pay opportunities for deeper savings measures.		

### Program Description:

The program is a comprehensive advanced clean energy solution for single family customers. The advanced clean energy path begins with the delivery of cost-effective therm-rich direct install measures that transitions to an advanced clean energy opportunity for the single family customer that can be financed by outside sources. The program is designed with potential to be replicated across residential segments and seeks to be transformational rather than transactional. It will transform the customer into a wiser and knowledgeable steward by instilling behavior to improve their home by reducing carbon footprint and enjoying increased comfort. The program leverages IOU electric, municipal electric, and local agency clean energy single family opportunities offerings, in addition to natural gas clean energy solutions.

### Intervention Strategies:

Direct Install: Customer Co-Payments  
 Direct Install: Comprehensive Direct Install  
 Financing and Alternative Funding

### Program Metrics:

DAC and HTR Enrollment, Energy Savings, Total System Benefit, GHG Reduction, Depth of Intervention

### High-level description of delivery workforce including necessary scale and its risks:

Delivery workforce includes third-party implementers and their trade ally network.

### Market Actors necessary for success:

Program Administrators, Third-Party Program Implementors

### Transition Plan:

Not applicable

### Solicitation Strategy:

Local Third Party

### Expected Program Life:

2024 - Ongoing

### Cost Effectiveness:

TRC = 0.46; PAC = 0.46

### Short Term Plan:

Targeting disadvantaged and hard to reach communities to meet gas energy savings to customers by providing no cost measures as well as providing co-pay measures.

### Long Term Outlook:

Educate customers and continue to seek and add new affordable measures to local offerings that reduce GHG emissions. Proactively partner with air quality management districts and water agencies.

### Proposed Annual Budgets for 2024-2027\*:

2024: \$3,325,745	2025: \$3,330,094
2026: \$3,333,562	2027: \$3,333,562

### Anticipated changes in budget for years 2028-2031:

Consistent with portfolio trend.

*\*The inclusion of annual budgets does not imply or guarantee that the current third party's contract will be extended.*

<b>Program ID:</b>	<b>SCG3936</b>	<b>Card # 16</b>
<b>Program Name:</b>	<b>RES-Multifamily Energy Alliance Program (Equity)</b>	
<b>Implementation Plan:</b>	<a href="https://cedars.sound-data.com/documents/download/2472/main/">https://cedars.sound-data.com/documents/download/2472/main/</a>	
<b>Portfolio Segment:</b>	Equity	<b>Implementation Party:</b> Local Third Party
<b>Applicable Sector:</b>	Residential	<b>Market Sub-Sector:</b> Residential Multifamily
<b>Sector Challenge:</b>	Low participation across the residential sector, especially in the equity-classified customer groups.	<b>Sector Opportunity:</b> Increased customer adoption of gas energy efficiency solutions, including behavioral-related actions, across all residential segments, especially within equity-classified customer groups.
<b>Known Equity Concerns in the Selected Markets:</b>	Ability to outreach and provide energy efficiency solutions to HTR and DAC customers.	<b>Proposed Solutions to Equity Concerns:</b> The program will seek to achieve at least 50 percent participation by HTR and DAC properties/owners using data analytics to assist program's account management and community/ethnic based outreach teams.
<b>Program Description:</b>		
The program provides outreach and customer screening services for other SoCalGas Multifamily offerings, and also provides a limited set of measures to customers who do not qualify for the ESA Program for Common Area Measures or who are not yet ready to complete larger-scale upgrades through the Multifamily Whole Building program. Using a one-stop-shop approach to working with the multifamily property owner/manager customer segment, the program drives interest in energy efficiency upgrades, direct customers to the appropriate program, and provide ongoing outreach and education that encourages customers to continue their energy efficiency journey with SoCalGas through additional program participation options. The program will seek to achieve at least 50 percent participation by HTR and DAC properties/owners.		
<b>Intervention Strategies:</b>	Direct Install: Standard Direct Install Customer Incentives: Deemed & Custom Intelligent Outreach: Customer Outreach & Awareness	<b>Program Metrics:</b> DAC and HTR Enrollment, Energy Savings, Total System Benefit, GHG Reduction, Depth of Intervention
<b>High-level description of delivery workforce including necessary scale and its risks:</b>		
The program manages project installations through participating trade allies. These trade allies are selected through a thorough evaluation process that includes a documented commitment to providing job access to disadvantaged workers measured by six unique criteria.		
<b>Market Actors necessary for success:</b>		
Multifamily Account Executives and single-point-of-contracts, third-implementer staff, trade allies including contractors, distributors, vendors, professional organizations, etc.		
<b>Transition Plan:</b>	<b>Solicitation Strategy:</b>	Local Third Party
Not applicable	<b>Expected Program Life:</b>	2024 - Ongoing
	<b>Cost Effectiveness:</b>	TRC = 0.22; PAC = 0.29
<b>Short Term Plan:</b>	<b>Long Term Outlook:</b>	
Continue to work with industry trade allies to create awareness and participation within HTR customers and DACs.	Increased customer adoption of gas energy efficiency solutions, including behavioral-related actions, across all residential segments, especially within equity-classified customer groups.	
<b>Proposed Annual Budgets for 2024-2027*:</b>		<b>Anticipated changes in budget for years 2028-2031:</b>
2024: \$2,173,076	2025: \$2,177,198	Consistent with portfolio trend.
2026: \$2,180,915	2027: \$2,180,915	

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<b>Program ID:</b>	<b>SCG3938</b>	<b>Card # 17</b>
<b>Program Name:</b>	<b>RES-Multifamily Whole Building Program (Resource Aquisition)</b>	
<b>Implementation Plan:</b>	<a href="https://cedars.sound-data.com/documents/download/2469/main/">https://cedars.sound-data.com/documents/download/2469/main/</a>	
<b>Portfolio Segment:</b>	Resource Acquisition	<b>Implementation Party:</b> Local Third Party
<b>Applicable Sector:</b>	Residential	<b>Market Sub-Sector:</b> Residential Multifamily
<b>Sector Challenge:</b>	Customers need “bundled/packaged” EE solutions to realize comprehensive EE improvements. They often need technical or financial information from multiple sources to bring EE improvements together for their properties.	<b>Sector Opportunity:</b> Increased customer awareness of bundled/packaged solutions that deliver credible and reliable info on energy efficiency equipment, expected energy savings, access to contractors and financing to assist with complex projects.
<b>Known Equity Concerns in the Selected Markets:</b>	Ability to provide energy efficiency solutions to HTR and DAC customers.	<b>Proposed Solutions to Equity Concerns:</b> Offering additional incentives for property owners for HTR and DAC properties.; Establishing a direct install approach for a certain set of measures which will remove some of the challenges for customers to consider when deciding if they should proceed with a comprehensive project.
<b>Program Description:</b>		
The program delivers comprehensive EE upgrades tailored to the needs of existing multifamily dwellings and their owners, tenants and management companies. The Program seeks to promote long-term energy benefits through comprehensive whole building energy efficiency retrofit measures including building shell upgrades, high-efficiency HVAC units, central heating and cooling systems, central domestic hot water heating and other deep energy reduction opportunities. These energy efficiency measures would be identified through an investment grade assessment. The Program will coordinate with the ESA Program and other energy efficiency programs to present a singular and streamlined approach for multifamily tenants, property owners and property managers.		
<b>Intervention Strategies:</b>		<b>Program Metrics:</b>
Customer Incentives: Bundled Measures Energy Audits & Technical Assistance Financing & Alternative Funding		Energy Savings, Total System Benefit, Cost-Effectiveness, GHG Reduction, Depth of Intervention
<b>High-level description of delivery workforce including necessary scale and its risks:</b>		
Program information is distributed and participation is achieved through a support network of program activities: Account executives, Single Point of Contact, third-party implementer and knowledgeable trade allies promote the program through events such as: webinars, email blasts, etc.		
<b>Market Actors necessary for success:</b>		
Account Executives, Single Point of Contact, coordination with third-party implementers, and industry trade allies learning and advocating for the program experience.		
<b>Transition Plan:</b>	<b>Solicitation Strategy:</b>	Local Third Party
Program to be solicited in 2022.	<b>Expected Program Life:</b>	2024 - Ongoing
	<b>Cost Effectiveness:</b>	TRC = 0.57; PAC = 0.75
<b>Short Term Plan:</b>	<b>Long Term Outlook:</b>	
Strengthen program resources and support to continue to promote program offerings to customers and demonstrate ease of participation.	Cross-promote programs and tools that allow customers to gain familiarity with other offerings and resources. Encourage customers to bring in additional projects in their portfolio to conduct further upgrades.	
<b>Proposed Annual Budgets for 2024-2027*:</b>		<b>Anticipated changes in budget for years 2028-2031:</b>
2024: \$3,155,659	2025: \$3,159,528	Consistent with portfolio trend.
2026: \$3,162,530	2027: \$3,162,530	

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<b>Program ID:</b>	<b>SCG_SW_FS</b>	<b>Card # 18</b>
<b>Program Name:</b>	<b>COM-SW-Point of Sale Food Service Program</b>	
<b>Implementation Plan:</b>	<a href="https://cedars.sound-data.com/documents/download/2044/main/">https://cedars.sound-data.com/documents/download/2044/main/</a>	
<b>Portfolio Segment:</b>	Resource Acquisition	<b>Implementation Party:</b> SW Third Party
<b>Applicable Sector:</b>	Commercial	<b>Market Sub-Sector:</b> Food Service
<b>Sector Challenge:</b>	Limited awareness by contractor community of available energy efficiency solutions and programs for their customers.	<b>Sector Opportunity:</b> Increased knowledge of the contracting community of energy efficiency products and programs that enable greater customer adoption of higher efficient equipment.
<b>Known Equity Concerns in the Selected Markets:</b>	Outreach and participation to small and medium businesses, hard-to-reach customers, and customers residing in disadvantaged communities.	<b>Proposed Solutions to Equity Concerns:</b> Engage contractors and distributors that reside in disadvantaged communities and ensure participation in program by equity-classified customers.
<b>Program Description:</b>		
The Statewide Foodservice Point-of-Sale Rebate program seeks to increase the sales of high efficiency commercial foodservice equipment by engaging midstream market actors to stock and actively market high efficiency equipment. This supports the California Long Term Energy Efficiency Strategic Plan (CLTEESP), which has an overarching objective to utilize the market to achieve more profound energy savings, aligning with the program goal to incentivize the sale of high-efficiency foodservice equipment by engaging mid-stream market actors. The program will deliver energy savings by providing end-use customers equipment rebates for high efficiency commercial kitchen equipment purchased at the point-of-sale.		
<b>Intervention Strategies:</b>	Midstream: Midstream Incentives Partnering: Industry (Manufacturers, Distributors) Intelligent Outreach: Outreach and Awareness	<b>Program Metrics:</b> Energy Savings, Total System Benefit, Cost-Effectiveness, GHG Reduction, HTR and DAC Enrollment, Units Rebated, Customers/Participants
<b>High-level description of delivery workforce including necessary scale and its risks:</b>		
Program workforce includes Program Implementer, associated sub-contractors, implementer outreach and marketing team, and dealer/vendor participants. Lack of current product availability and supply chain issues are progressively making energy efficiency more difficult to obtain.		
<b>Market Actors necessary for success:</b>		
Third-party implementer, sub-contractors and participating dealers/vendors, funding Program Administrators, lead Program Administrators, SoCalGas outreach teams to include Account Executives, TradePro's and associated field representatives.		
<b>Transition Plan:</b>	<b>Solicitation Strategy:</b>	SW Third Party
Not applicable	<b>Expected Program Life:</b>	2024 - Ongoing
	<b>Cost Effectiveness:</b>	TRC = 0.99; PAC = 1.26
<b>Short Term Plan:</b>	<b>Long Term Outlook:</b>	
Increased dealer and national account participation, program outreach, and online program presence.	Continuous program participation, measure and QPL development, program optimization, market penetration, and utility collaboration and partnership.	
<b>Proposed Annual Budgets for 2024-2027*:</b>		<b>Anticipated changes in budget for years 2028-2031:</b>
2024: \$3,900,267	2025: \$3,900,267	Consistent with portfolio trend.
2026: \$3,900,267	2027: \$3,900,267	

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<b>Program ID:</b>	<b>SCG_SW_MCWH</b>	<b>Card # 19</b>
<b>Program Name:</b>	<b>COM-SW-Midstream Commercial Water Heating Program</b>	
<b>Implementation Plan:</b>	<a href="https://cedars.sound-data.com/documents/download/1972/main/">https://cedars.sound-data.com/documents/download/1972/main/</a>	
<b>Portfolio Segment:</b>	Resource Acquisition	<b>Implementation Party:</b> SW Third Party
<b>Applicable Sector:</b>	Commercial	<b>Market Sub-Sector:</b> Multi-Sub-Sector
<b>Sector Challenge:</b>	Limited awareness by contractor community of available energy efficiency solutions and programs for their customers.	<b>Sector Opportunity:</b> Increased knowledge of the contracting community of energy efficiency products and programs that enable greater customer adoption of higher efficient equipment.
<b>Known Equity Concerns in the Selected Markets:</b>	Outreach and participation to small and medium businesses, hard-to-reach customers, and customers residing in disadvantaged communities.	<b>Proposed Solutions to Equity Concerns:</b> Engage contractors and distributors that reside in disadvantaged communities and ensure participation in program by equity-classified customers.
<b>Program Description:</b>		
The Statewide Midstream Commercial Water Heating program seeks to increase the sales of high efficiency commercial water heating equipment by engaging midstream market actors to stock and actively market high efficiency equipment. This supports the California Long Term Energy Efficiency Strategic Plan (CLTEESP), which has an overarching objective to utilize the market to achieve more profound energy savings, aligning with the program goal to incentivize the sale of high-efficiency water heating equipment by engaging mid-stream market actors. The program will deliver energy savings by providing end-use customers equipment rebates for high efficiency commercial water heating equipment purchased at the point-of-sale.		
<b>Intervention Strategies:</b>	Midstream: Midstream Incentives Partnering: Industry (Manufacturers, Distributors) Intelligent Outreach: Outreach and Awareness	<b>Program Metrics:</b> Energy Savings, Total System Benefit, Cost-Effectiveness, GHG Reduction, HTR and DAC Enrollment, Units Rebated, Customers/Participants
<b>High-level description of delivery workforce including necessary scale and its risks:</b>		
Program workforce includes Program Implementer, associated sub-contractors, implementer outreach and marketing team, and dealer/vendor participants. Lack of current product availability and supply chain issues are progressively making energy efficiency more difficult to obtain.		
<b>Market Actors necessary for success:</b>		
Third-party implementer, sub-contractors and participating dealers/vendors, funding Program Administrators, lead Program Administrators, SoCalGas outreach teams to include Account Executives, TradePro's and associated field representatives.		
<b>Transition Plan:</b>	<b>Solicitation Strategy:</b>	SW Third Party
Not applicable	<b>Expected Program Life:</b>	2024 - Ongoing
	<b>Cost Effectiveness:</b>	TRC = 1.38; PAC = 1.65
<b>Short Term Plan:</b>	<b>Long Term Outlook:</b>	
Increased dealer and national account participation, program outreach, and online program presence.	Continuous program participation, measure and QPL development, program optimization, market penetration, and utility collaboration and partnership.	
<b>Proposed Annual Budgets for 2024-2027*:</b>		<b>Anticipated changes in budget for years 2028-2031:</b>
2024: \$3,706,341	2025: \$3,703,551	Consistent with portfolio trend.
2026: \$3,700,635	2027: \$3,700,635	

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<b>Program ID:</b>	<b>SCG3771</b>	<b>Card # 20</b>	
<b>Program Name:</b>	<b>SOL-IDEEA365 (new IDEEA365 solicitations)</b>		
<b>Implementation Plan:</b>	<a href="https://cedars.sound-data.com/documents/download/1104/main/">https://cedars.sound-data.com/documents/download/1104/main/</a>		
<b>Portfolio Segment:</b>	Market Support	<b>Implementation Party:</b>	Local Third Party
<b>Applicable Sector:</b>	Commercial	<b>Market Sub-Sector:</b>	Multi-Sub-Sector
<b>Sector Challenge:</b>	<b>Sector Opportunity:</b>		
Continue to innovate and advance program delivery and technologies to provide customers with energy efficiency and decarbonization options.	Provide the energy efficiency community opportunities to introduce and test new ideas and technologies into the portfolio.		
<b>Known Equity Concerns in the Selected Markets:</b>	<b>Proposed Solutions to Equity Concerns:</b>		
Not applicable	Not applicable		

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**Program Description:**

This program will continue to issue IDEEA365 solicitations throughout the 2024-2027 program cycle to allow for ongoing introduction of innovative ideas, programs and technologies into the energy efficiency portfolio by drawing from the skill, experience, and creativity of the energy efficiency community. Subsequently, targeted solicitations may be issued to address specific portfolio needs, goals or mandated requirements.

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**Intervention Strategies:**

Customer Incentives  
Direct Install  
Technical Assistance

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**Program Metrics:**

Not applicable

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**High-level description of delivery workforce including necessary scale and its risks:**

Not applicable

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**Market Actors necessary for success:**

Third Party Program Implementors

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**Transition Plan:**

Not applicable

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**Solicitation Strategy:**

Local Third Party

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**Expected Program Life:**

2024 - Ongoing

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**Cost Effectiveness:**

Not applicable

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**Short Term Plan:**

Issue "rolling" IDEEA365 solicitations seeking innovative ideas and technologies.

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**Long Term Outlook:**

Issue "rolling" IDEEA365 solicitations seeking innovative ideas and technologies.

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**Proposed Annual Budgets for 2024-2027\*:**

2024: \$3,572,044      2025: \$3,595,914  
2026: \$3,960,518      2027: \$3,960,518

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**Anticipated changes in budget for years 2028-2031:**

Consistent with portfolio trend.

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<b>Program ID:</b>	<b>SCG3834</b>	<b>Card # 21</b>
<b>Program Name:</b>	<b>COM-LADWP Direct Install Program</b>	
<b>Implementation Plan:</b>	<a href="https://cedars.sound-data.com/documents/download/2142/main/">https://cedars.sound-data.com/documents/download/2142/main/</a>	
<b>Portfolio Segment:</b>	Resource Acquisition	<b>Implementation Party:</b> Local Third Party
<b>Applicable Sector:</b>	Commercial	<b>Market Sub-Sector:</b> Multi-Sub-Sector
<b>Sector Challenge:</b>	<b>Sector Opportunity:</b>	
Need for safe, quality installations in the small commercial customer groups.	Increased access to a uniquely trained workforce that can perform safe, quality installations for small commercial customers.	
<b>Known Equity Concerns in the Selected Markets:</b>	<b>Proposed Solutions to Equity Concerns:</b>	
Limited capital resources, lack of expertise and understanding of the benefits of energy efficiency, a suspicion of the “free offer” and its legitimacy, and language and cultural barriers. Customers in short-term leased dwellings face split-incentive barriers.	The program will aims to address the split incentive barrier situation with both the owner/property management company and the tenant to communicate the benefits and gain approval for program services. Program offers tenant-centric no-cost or low-cost retrofit	
<b>Program Description:</b>	The program, implemented by Los Angeles Water & Power delivers no-cost or low-cost energy efficiency equipment retrofits to eligible small and medium-sized commercial businesses throughout the SoCalGas service territory. The retrofits are to be completed through installation contractors to reduce energy and water usage, and result in resource savings for public and private commercial customers. The program targets these customers in a staged delivery approach that provides program services in specific geographic areas allowing for a more concentrated, directed, and comprehensive program.	
<b>Intervention Strategies:</b>	<b>Program Metrics:</b>	
Partnering: Public Agencies and Municipalities Direct Install: Standard Direct Install Intelligent Outreach: Customer Targeting	DAC and HTR Enrollment, Energy Savings, Total System Benefit, GHG Reduction	
<b>High-level description of delivery workforce including necessary scale and its risks:</b>	The direct install contractor or POU program staff will be responsible for implementing the program and performing program services such as customer outreach, surveying existing equipment, explaining and promoting retrofits, performing retrofit installations for customers, and coordinating services performed by Community-Based	
<b>Market Actors necessary for success:</b>	Program Administrators, POU staff, third party contractor.	
<b>Transition Plan:</b>	<b>Solicitation Strategy:</b>	Local Third Party
Not applicable	<b>Expected Program Life:</b>	2024 - Ongoing
	<b>Cost Effectiveness:</b>	TRC = 1.69; PAC = 1.69
<b>Short Term Plan:</b>	<b>Long Term Outlook:</b>	
Jointly offer comprehensive electric, natural gas, and water savings to small and medium commercial customers.	Educate customers and continue to seek and add new affordable measures to local offerings. Proactively partner with other agencies where feasible.	
<b>Proposed Annual Budgets for 2024-2027*:</b>	<b>Anticipated changes in budget for years 2028-2031:</b>	
2024: \$118,110                      2025: \$118,925	Consistent with portfolio trend.	
2026: \$119,827                      2027: \$119,827		

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<b>Program ID:</b>	<b>SCG3882</b>	<b>Card # 22</b>
<b>Program Name:</b>	<b>COM-Small and Medium Commercial EE Program (Resource Aquisition)</b>	
<b>Implementation Plan:</b>	<a href="https://cedars.sound-data.com/documents/download/1877/main/">https://cedars.sound-data.com/documents/download/1877/main/</a>	
<b>Portfolio Segment:</b>	Resource Acquisition	<b>Implementation Party:</b> Local Third Party
<b>Applicable Sector:</b>	Commercial	<b>Market Sub-Sector:</b> Multi-Sub-Sector
<b>Sector Challenge:</b>	<b>Sector Opportunity:</b>	
Varied and unique segments with specific needs make it challenging to offer a standard program that fits the needs of all customers.	Increased customer adoption of energy efficiency solutions across all customer segments and sizes with a focus on those with untapped energy efficiency potential.	
<b>Known Equity Concerns in the Selected Markets:</b>	<b>Proposed Solutions to Equity Concerns:</b>	
Need for safe, quality installations in the small commercial customer groups.	Customer Targeting, Direct Install, and increased access to a uniquely trained workforce that can perform safe, quality installations for equity classified customers. Increased knowledge of the contracting community of EE products and programs.	
<b>Program Description:</b>		
This program targets small and medium businesses customer facilities (with therm usage up to 50,000 therms per year) with an emphasis on restaurants, lodging, dry cleaning, retail, and offices among other segments. The program will focus on helping businesses in disadvantaged communities improve their competitiveness by saving energy through several program resources, including assessments, kits, and prescribed incentives.		
<b>Intervention Strategies:</b>		<b>Program Metrics:</b>
Energy Audits & Intelligent Outreach: Customer Targeting Direct Install: Comprehensive Direct Install Financing: On-Bill Financing		Energy Savings, Total System Benefit, Cost-Effectiveness, GHG Reduction
<b>High-level description of delivery workforce including necessary scale and its risks:</b>		
Delivery workforce includes third-party implementers and their trade ally network.		
<b>Market Actors necessary for success:</b>		
Program Administrators, Third-Party Program Implementors, Contractors		
<b>Transition Plan:</b>	<b>Solicitation Strategy:</b>	Local Third Party
Not applicable	<b>Expected Program Life:</b>	2024 - Ongoing
	<b>Cost Effectiveness:</b>	TRC = 0.96; PAC = 0.98
<b>Short Term Plan:</b>	<b>Long Term Outlook:</b>	
Increased customer adoption of energy efficiency solutions across all customer segments and sizes with a focus on those with untapped energy efficiency potential.	Achieve greater energy savings from all commercial segments and facilitate greater adoption of other decarb solutions such as fuel cells, renewable natural gas (RNG), hydrogen and other emerging decarb solutions.	
<b>Proposed Annual Budgets for 2024-2027*:</b>		<b>Anticipated changes in budget for years 2028-2031:</b>
2024: \$1,901,070	2025: \$1,906,526	Consistent with portfolio trend.
2026: \$1,939,816	2027: \$1,939,816	

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<b>Program ID:</b>	<b>SCG3887</b>	<b>Card # 23</b>
<b>Program Name:</b>	<b>COM-Commercial-BEST (Resource Aquisition)</b>	
<b>Implementation Plan:</b>	<a href="https://cedars.sound-data.com/documents/download/1928/main/">https://cedars.sound-data.com/documents/download/1928/main/</a>	
<b>Portfolio Segment:</b>	Resource Acquisition	<b>Implementation Party:</b> Local Third Party
<b>Applicable Sector:</b>	Commercial	<b>Market Sub-Sector:</b> Multi-Sub-Sector
<b>Sector Challenge:</b>	<b>Sector Opportunity:</b>	
Varied and unique segments with specific needs make it challenging to offer a standard program that fits the needs of all customers.	Increased customer adoption of energy efficiency solutions across all customer segments and sizes with a focus on those with untapped energy efficiency potential.	
<b>Known Equity Concerns in the Selected Markets:</b>	<b>Proposed Solutions to Equity Concerns:</b>	
Need for safe, quality installations in the small commercial customer groups.	Customer Targeting, Direct Install, and increased access to a uniquely trained workforce that can perform safe, quality installations for equity classified customers. Increased knowledge of the contracting community of EE products and programs.	
<b>Program Description:</b>		
This program targets small and medium businesses that have an annual gas energy usage up to 50,000 therms. The program will have an emphasis on customer segments with predominantly high natural gas loads, such as hospitality, restaurants, laundries, small medical, and office buildings. The program will offer a suite of measures that have a set incentive rate as well as measures that are offered through Direct Install. The program will utilize a comprehensive outreach strategy that leverages Business Energy Advisors, contractor/trade allies and community-based organizations that cater to small and medium-sized businesses. Financing support for customers who participate in the program will also be leveraged by offering access to several financing agencies based on the company and project history, project size, and project scope.		
<b>Intervention Strategies:</b>	<b>Program Metrics:</b>	
Energy Audits & Intelligent Outreach: Customer Targeting Direct Install: Comprehensive Direct Install Financing: On-Bill Financing and Alternative Financing	Energy Savings, Total System Benefit, Cost-Effectiveness, GHG Reduction	
<b>High-level description of delivery workforce including necessary scale and its risks:</b>		
Delivery workforce includes third-party implementers, their trade ally network and community based organizations.		
<b>Market Actors necessary for success:</b>		
Program Administrators, Third-Party Program Implementors, Contractors, CBOs.		
<b>Transition Plan:</b>	<b>Solicitation Strategy:</b>	Local Third Party
Not applicable	<b>Expected Program Life:</b>	2024 - Ongoing
	<b>Cost Effectiveness:</b>	TRC = 1.54; PAC = 1.81
<b>Short Term Plan:</b>	<b>Long Term Outlook:</b>	
Increased customer adoption of energy efficiency solutions across all customer segments and sizes with a focus on those with untapped energy efficiency potential.	Achieve greater energy savings from all commercial segments and facilitate greater adoption of other decarb solutions such as fuel cells, renewable natural gas (RNG), hydrogen and other emerging decarb solutions.	
<b>Proposed Annual Budgets for 2024-2027*:</b>		<b>Anticipated changes in budget for years 2028-2031:</b>
2024: \$1,920,301	2025: \$1,924,674	Consistent with portfolio trend.
2026: \$1,942,689	2027: \$1,942,689	

*\*The inclusion of annual budgets does not imply or guarantee that the current third party's contract will be extended.*

<b>Program ID:</b>	<b>SCG3891</b>	<b>Card # 24</b>	
<b>Program Name:</b>	<b>COM-Service RCx Large Commercial Program</b>		
<b>Implementation Plan:</b>	<a href="https://cedars.sound-data.com/documents/download/2018/main/">https://cedars.sound-data.com/documents/download/2018/main/</a>		
<b>Portfolio Segment:</b>	Resource Acquisition	<b>Implementation Party:</b>	Local Third Party
<b>Applicable Sector:</b>	Commercial	<b>Market Sub-Sector:</b>	Commercial
<b>Sector Challenge:</b>	<b>Sector Opportunity:</b>		
Pandemic continues to present challenges, including access to customer sites and obstacles to traditional M&V.	Increased number of offerings and options that address market access and wellness issues presented by an ongoing pandemic. Expand behavior- and operational-based interventions that promote EE and decarbonization.		
<b>Known Equity Concerns in the Selected Markets:</b>	<b>Proposed Solutions to Equity Concerns:</b>		
Not applicable	Not applicable		

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**Program Description:**

The program offers participating customers population-level normalized metered energy consumption (NMEC)-based energy savings through the direct implementation of retrocommissioning (RCx) and optimization services at large commercial facilities throughout the SoCalGas service territory.

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**Intervention Strategies:**

Behavioral, Operational, and Maintenance  
Retrocommissioning  
Direct Install

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**Program Metrics:**

Energy Savings, Total System Benefit, Cost-Effectiveness, GHG Reduction

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**High-level description of delivery workforce including necessary scale and its risks:**

Turnkey energy efficiency service provider and general contractor.

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**Market Actors necessary for success:**

Program Administrators, Third-party program implementors and their contractors.

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**Transition Plan:**

Not applicable

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**Solicitation Strategy:**

Local Third Party

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**Expected Program Life:**

2024 - Ongoing

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**Cost Effectiveness:**

TRC = 0.93; PAC = 0.93

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**Short Term Plan:**

Enrollment of large commercial facilities into program and demonstrate operational and RCx value within energy efficiency portfolio.

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**Long Term Outlook:**

Approach leverages NMEC, which is expected to grow significantly as a share of the energy efficiency resource portfolio and provides access to additional untapped reliability resource benefits.

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**Proposed Annual Budgets for 2024-2027\*:**

2024: \$970,624                      2025: \$973,851  
2026: \$977,045                      2027: \$977,045

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**Anticipated changes in budget for years 2028-2031:**

Consistent with portfolio trend.

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*\*The inclusion of annual budgets does not imply or guarantee that the current third party's contract will be extended.*

<b>Program ID:</b>	<b>SCG3892</b>	<b>Card # 25</b>	
<b>Program Name:</b>	<b>COM-Large Commercial Energy Efficiency Program</b>		
<b>Implementation Plan:</b>	<a href="https://cedars.sound-data.com/documents/download/2029/main/">https://cedars.sound-data.com/documents/download/2029/main/</a>		
<b>Portfolio Segment:</b>	Resource Acquisition	<b>Implementation Party:</b>	Local Third Party
<b>Applicable Sector:</b>	Commercial	<b>Market Sub-Sector:</b>	Multi-Sub-Sector
<b>Sector Challenge:</b>	<b>Sector Opportunity:</b>		
Unique customer segments make it difficult to offer a standard program that fits the needs of all customers. The sector is trending towards more leased properties, increasing the split incentive barrier.	Increased customer adoption of energy efficiency solutions across all customer segments and sizes with a focus on those with untapped energy efficiency potential. Increased energy efficiency levels in commercial leased		
<b>Known Equity Concerns in the Selected Markets:</b>	<b>Proposed Solutions to Equity Concerns:</b>		
Program reach and participation of customers residing in DACs.	Increased efforts to enroll customers residing in DACs as well as leased properties. Provide tailored solutions to these customers.		

### Program Description:

The program serves large commercial customers with annual gas consumption of more than 50,000 therms. Market segments that will be serviced include, but are not limited to office, retail, healthcare, lodging, food service, laundry & dry cleaning, gymnasiums, family entertainment centers, and all other commercial segments. The program offers a tailored approach that includes segment-specific marketing, targeted outreach, site-specific energy audit reports, technical assistance, financing, and measurement and verification. Energy efficiency upgrades are delivered with a full-service, pay-for-performance approach.

### Intervention Strategies:

Energy Audits & Intelligent Outreach  
 Technical Assistance: Technical Support  
 Customer Incentives: Meter-based, Deemed, Custom

### Program Metrics:

Energy Savings, Total System Benefit, Cost-Effectiveness, GHG Reduction, DAC Enrollment, Leased Properties Enrollment

### High-level description of delivery workforce including necessary scale and its risks:

Delivery workforce includes third-party implementers and their trade ally network.

### Market Actors necessary for success:

Program Administrators, Third-Party Program Implementors, Trade ally network.

### Transition Plan:

Not applicable

### Solicitation Strategy:

Local Third Party

### Expected Program Life:

2024 - Ongoing

### Cost Effectiveness:

TRC = 1.38; PAC = 1.76

### Short Term Plan:

Enrollment of large commercial facilities into program and provide comprehensive solutions to customers. Enroll customers residing in DACs into program.

### Long Term Outlook:

Achieve greater energy savings from all large commercial segments and facilitate greater adoption of other decarb solutions such as fuel cells, renewable natural gas (RNG), hydrogen and other emerging decarb solutions.

### Proposed Annual Budgets for 2024-2027\*:

2024: \$4,697,798      2025: \$4,711,626  
 2026: \$4,765,010      2027: \$4,765,010

### Anticipated changes in budget for years 2028-2031:

Consistent with portfolio trend.

*\*The inclusion of annual budgets does not imply or guarantee that the current third party's contract will be extended.*

<b>Program ID:</b>	<b>SCG3909</b>	<b>Card # 26</b>	
<b>Program Name:</b>	<b>CC-Nonresidential Energy Advisor Program</b>		
<b>Implementation Plan:</b>	<a href="https://cedars.sound-data.com/documents/download/2234/main/">https://cedars.sound-data.com/documents/download/2234/main/</a>		
<b>Portfolio Segment:</b>	Market Support	<b>Implementation Party:</b>	Local Third Party
<b>Applicable Sector:</b>	Commercial	<b>Market Sub-Sector:</b>	Multi-Sub-Sector
<b>Sector Challenge:</b>	<b>Sector Opportunity:</b>		
Varied and unique segments with specific needs make it challenging to offer a standard program that fits the needs of all customers.	Increased customer adoption of energy efficiency solutions across all customer segments and sizes with a focus on those with untapped energy efficiency potential.		
<b>Known Equity Concerns in the Selected Markets:</b>	<b>Proposed Solutions to Equity Concerns:</b>		
Low adoption of energy efficiency solutions by equity-classified customers, including small customers.	Increased adoption and tailored energy efficiency solutions to small customers.		
<b>Program Description:</b>			
This program provides services to support customer education and participation in energy efficiency, demand response and other clean energy technology opportunities and benefits, along with awareness of greenhouse gas and water conservation activities. The program provides a streamlined and coordinated assignment of right-sized customer solutions. The process starts with an initial analysis of a customer's needs, determination from the analysis which audit will service the customer with the highest cost/benefit, identify additional program support and key indicators that will motivate the customer to implement energy saving and program recommendations.			
<b>Intervention Strategies:</b>		<b>Program Metrics:</b>	
Energy Audits: Energy Audits		Benchmarking Penetration, Market Support Demand	
Energy Audits: Industry Best Practices		Metrics, Number of audits provided	
Program Cordination: Third-party implementers			
<b>High-level description of delivery workforce including necessary scale and its risks:</b>			
The delivery will depend on SoCalGas and the third-party implementer being able to outreach to customers, conduct audits, and provide useful recommendations that will compel customers to participate.			
<b>Market Actors necessary for success:</b>			
Customer awareness of audit services that can propel customer participation in energy efficiency.			
<b>Transition Plan:</b>		<b>Solicitation Strategy:</b>	
Transitioning from a Core PA to Third-Party Program in 2022/2023.		Local Third Party	
		<b>Expected Program Life:</b>	
		2024 - Ongoing	
		<b>Cost Effectiveness:</b>	
		Not applicable	
<b>Short Term Plan:</b>		<b>Long Term Outlook:</b>	
Ramp up third-party program to full implementation. Provide audit services to customers.		Integrate and coordinate audits with other programs and integrate with other clean energy programs and decarbonization efforts.	
<b>Proposed Annual Budgets for 2024-2027*:</b>		<b>Anticipated changes in budget for years 2028-2031:</b>	
2024: \$921,370	2025: \$925,440	Consistent with portfolio trend.	
2026: \$928,284	2027: \$928,284		

*\*The inclusion of annual budgets does not imply or guarantee that the current third party's contract will be extended.*

<b>Program ID:</b>	<b>SCG3910</b>	<b>Card # 27</b>
<b>Program Name:</b>	<b>CC-Nonresidential Calculated Incentive Program</b>	
<b>Implementation Plan:</b>	<a href="https://cedars.sound-data.com/documents/download/2232/main/">https://cedars.sound-data.com/documents/download/2232/main/</a>	
<b>Portfolio Segment:</b>	Resource Acquisition	<b>Implementation Party:</b> Core PA
<b>Applicable Sector:</b>	Commercial	<b>Market Sub-Sector:</b> Multi-Sub-Sector
<b>Sector Challenge:</b>	<b>Sector Opportunity:</b>	
Varied and unique segments with specific needs make it challenging to offer a standard program that fits the needs of all customers.	Increased customer adoption of energy efficiency solutions across all customer segments and sizes with a focus on those with untapped energy efficiency potential.	
<b>Known Equity Concerns in the Selected Markets:</b>	<b>Proposed Solutions to Equity Concerns:</b>	
This program is catered to larger customers that have the ability to go through the custom process. Customers residing in DACs are eligible.	Create tailored energy efficiency solutions to customers based on needs through energy audits including large customers that reside in DACs.	
<b>Program Description:</b>		
This program provides customers technical and calculation assistance, as well as incentives based on calculated savings, to influence the design and installation of energy efficient equipment and systems in both retrofit and added load applications. This program is largely utilized for projects where a rebate is not available through a Deemed program, where project conditions require customized calculations to provide the most accurate savings estimates, or where a project has interactive effects that are best captured through whole building or whole system modeling. Because calculated savings estimates are based on actual customer operating conditions, pre-inspections (for retrofit projects) and post-inspections are typically required as part of each project's documentation.		
<b>Intervention Strategies:</b>		<b>Program Metrics:</b>
Customer Incentive: Custom Incentives		Energy Savings, Total System Benefit, Cost-Effectiveness,
Technical Assistance: Engineering Support		GHG Reduction
Energy Audits: Energy Audits		
<b>High-level description of delivery workforce including necessary scale and its risks:</b>		
Developers, building owners, building managers and building contractors, design engineers build or retrofit to current standards. Risks include need for extensions, accurate measure & verification, length of project, and changes in scope.		
<b>Market Actors necessary for success:</b>		
Customers and project sponsors (contractors, design teams, vendors, ESCOs), market stakeholders, CPUC, and other entities.		
<b>Transition Plan:</b>	<b>Solicitation Strategy:</b>	Core PA
Not applicable	<b>Expected Program Life:</b>	2024 - 2027
	<b>Cost Effectiveness:</b>	TRC = 1.51; PAC = 1.84
<b>Short Term Plan:</b>	<b>Long Term Outlook:</b>	
This program will ramp down as SoCalGas onboards more third-party programs.	This program will ramp down as SoCalGas onboards more third-party programs.	
<b>Proposed Annual Budgets for 2024-2027:</b>		<b>Anticipated changes in budget for years 2028-2031:</b>
2024: \$4,401,206	2025: \$3,941,166	Planned program closure by end of PY 2027.
2026: \$3,381,076	2027: \$3,381,076	

<b>Program ID:</b>	<b>SCG3911</b>	<b>Card # 28</b>	
<b>Program Name:</b>	<b>CC-Nonresidential Deemed Incentive Program</b>		
<b>Implementation Plan:</b>	<a href="https://cedars.sound-data.com/documents/download/2233/main/">https://cedars.sound-data.com/documents/download/2233/main/</a>		
<b>Portfolio Segment:</b>	Resource Acquisition	<b>Implementation Party:</b>	Core PA
<b>Applicable Sector:</b>	Commercial	<b>Market Sub-Sector:</b>	Multi-Sub-Sector
<b>Sector Challenge:</b>	<b>Sector Opportunity:</b>		
Varied and unique segments with specific needs make it challenging to offer a standard program that fits the needs of all customers.	Increased customer adoption of energy efficiency solutions across all customer segments and sizes with a focus on those with untapped energy efficiency potential.		
<b>Known Equity Concerns in the Selected Markets:</b>	<b>Proposed Solutions to Equity Concerns:</b>		
Low adoption of energy efficiency solutions by equity-classified customers, including small customers.	Increased adoption and tailored energy efficiency solutions to small customers.		
<b>Program Description:</b>			
This program provides rebates for the installation of energy efficient equipment. Deemed retrofit measures have prescribed energy savings and incentive amounts and are generally intended for projects that have well defined energy and demand savings estimates. The program model is designed to reduce the initial purchase costs of such equipment and offer a simple application process. Providing a menu of prescribed common measures simplifies the process of reviewing project proposals and provides a "per-widgit" rebate that reduces the cost of retrofitting outdated, inefficient equipment and new construction measures.			
<b>Intervention Strategies:</b>		<b>Program Metrics:</b>	
Customer Incentives: Deemed Incentives		DAC and HTR Enrollment, Energy Savings, Total System Benefit, GHG Reduction	
Customer Incentives: Tiered Incentives			
Customer Incentives: Incentive Stacking			
<b>High-level description of delivery workforce including necessary scale and its risks:</b>			
Local deemed program offering intended to provide continuous opportunity to customers who may have not received program opportunity from a participating third-party program.			
<b>Market Actors necessary for success:</b>			
Customer and contractor awareness of program for energy efficiency upgrades that are outside of local and statewide third-party programs.			
<b>Transition Plan:</b>	<b>Solicitation Strategy:</b>		Core PA
Not applicable	<b>Expected Program Life:</b>		2024 - Ongoing
	<b>Cost Effectiveness:</b>		TRC = 1.04; PAC = 1.71
<b>Short Term Plan:</b>	<b>Long Term Outlook:</b>		
Continuous improvement of program model, incentive structure, and measure offerings.	Continuous improvement of program model, incentive structure, and measure offerings including bundling with other clean energy technologies that reduce GHG emissions.		
<b>Proposed Annual Budgets for 2024-2027:</b>		<b>Anticipated changes in budget for years 2028-2031:</b>	
2024: \$7,801,854	2025: \$8,055,841	Consistent with portfolio trend.	
2026: \$8,466,242	2027: \$8,466,242		

<b>Program ID:</b>	<b>SCG3937</b>	<b>Card # 29</b>
<b>Program Name:</b>	<b>COM-Small and Medium Commercial EE Program (Equity)</b>	
<b>Implementation Plan:</b>	<a href="https://cedars.sound-data.com/documents/download/2470/main/">https://cedars.sound-data.com/documents/download/2470/main/</a>	
<b>Portfolio Segment:</b>	Resource Acquisition	<b>Implementation Party:</b> Local Third Party
<b>Applicable Sector:</b>	Commercial	<b>Market Sub-Sector:</b> Multi-Sub-Sector
<b>Sector Challenge:</b>	<b>Sector Opportunity:</b>	
Varied and unique segments with specific needs make it challenging to offer a standard program that fits the needs of all customers.	Increased customer adoption of EE solutions across all customer segments and sizes with a focus on those with untapped EE potential. Increase EE adoption levels of equity-classified and small customer groups.	
<b>Known Equity Concerns in the Selected Markets:</b>	<b>Proposed Solutions to Equity Concerns:</b>	
Need for safe, quality installations in the small commercial, HTR and DAC customer groups.	Customer Targeting, Direct Install, and increased access to a uniquely trained workforce that can perform safe, quality installations for equity classified customers. Increased knowledge of the contracting community of EE products and programs.	
<b>Program Description:</b>		
This cost effective program is categorized as Resource Acquisition, but it has an significant Equity Segment focus. This program targets small and medium businesses customer facilities (with therm usage up to 50,000 therms per year) with an emphasis on restaurants, lodging, dry cleaning, retail, and offices among other segments. The program will focus on helping businesses in disadvantaged communities improve their competitiveness by saving energy through several program resources, including assessments, kits, and prescribed incentives.		
<b>Intervention Strategies:</b>		<b>Program Metrics:</b>
Intelligent Outreach: Customer Outreach & Awareness Energy Audits Direct Install: Comprehensive Direct Install		DAC and HTR Enrollment, Energy Savings, Total System Benefit, GHG Reduction
<b>High-level description of delivery workforce including necessary scale and its risks:</b>		
Delivery workforce includes third-party implementers and their trade ally network.		
<b>Market Actors necessary for success:</b>		
Program Administrators, Third-Party Program Implementors, Contractors		
<b>Transition Plan:</b>	<b>Solicitation Strategy:</b>	Local Third Party
Not applicable	<b>Expected Program Life:</b>	2024 - Ongoing
	<b>Cost Effectiveness:</b>	TRC = 1.35; PAC = 1.35
<b>Short Term Plan:</b>	<b>Long Term Outlook:</b>	
Achieve greater program participation from equity-classified and small customer groups.	Achieve greater energy savings from all commercial segments and facilitate greater adoption of other decarb solutions such as fuel cells, renewable natural gas (RNG), hydrogen and other emerging decarb solutions.	
<b>Proposed Annual Budgets for 2024-2027*:</b>		<b>Anticipated changes in budget for years 2028-2031:</b>
2024: \$2,269,158	2025: \$2,272,816	Consistent with portfolio trend.
2026: \$2,275,982	2027: \$2,275,982	

*\*The inclusion of annual budgets does not imply or guarantee that the current third party's contract will be extended.*

<b>Program ID:</b>	<b>SCG3940</b>	<b>Card # 30</b>
<b>Program Name:</b>	<b>COM-Commercial-BEST (Equity)</b>	
<b>Implementation Plan:</b>	<a href="https://cedars.sound-data.com/documents/download/2471/main/">https://cedars.sound-data.com/documents/download/2471/main/</a>	
<b>Portfolio Segment:</b>	Resource Acquisition	<b>Implementation Party:</b> Local Third Party
<b>Applicable Sector:</b>	Commercial	<b>Market Sub-Sector:</b> Multi-Sub-Sector
<b>Sector Challenge:</b>	<b>Sector Opportunity:</b>	
Varied and unique segments with specific needs make it challenging to offer a standard program that fits the needs of all customers.	Increased customer adoption of EE solutions across all customer segments and sizes with a focus on those with untapped energy efficiency potential. Increase EE adoption levels of equity-classified and small customers.	
<b>Known Equity Concerns in the Selected Markets:</b>	<b>Proposed Solutions to Equity Concerns:</b>	
Need for safe, quality installations in the small commercial, HTR and DAC customer groups.	Customer Targeting, Direct Install, and increased access to a uniquely trained workforce that can perform safe, quality installations for equity classified customers. Increased knowledge of the contracting community of EE products and programs.	
<b>Program Description:</b>		
This cost effective program is categorized as Resource Acquisition, but it has an significant Equity Segment focus. The program targets small and medium businesses that have an annual gas energy usage up to 50,000 therms. The program will have an emphasis on customer segments with predominantly high natural gas loads, such as hospitality, restaurants, laundries, small medical, and office buildings. The program will offer a suite of measures that with incentives complimented with Direct Install measures. The program uses a comprehensive outreach strategy that leverages Business Energy Advisors, contractor/trade allies and community-based organizations that cater to small and medium-sized businesses. Financing support for customers who participate in the program will also be leveraged by offering access to several financing agencies based on the company and project history, size, and scope.		
<b>Intervention Strategies:</b>	<b>Program Metrics:</b>	
Intelligent Outreach: Customer Outreach & Awareness Energy Audits Direct Install: Comprehensive Direct Install	DAC and HTR Enrollment, Energy Savings, Total System Benefit, GHG Reduction	
<b>High-level description of delivery workforce including necessary scale and its risks:</b>		
Delivery workforce includes third-party implementers, their trade ally network and community based organizations.		
<b>Market Actors necessary for success:</b>		
Program Administrators, Third-Party Program Implementors, Contractors, CBOs.		
<b>Transition Plan:</b>	<b>Solicitation Strategy:</b>	Local Third Party
Not applicable	<b>Expected Program Life:</b>	2024 - Ongoing
	<b>Cost Effectiveness:</b>	TRC = 1.59; PAC = 1.59
<b>Short Term Plan:</b>	<b>Long Term Outlook:</b>	
Achieve greater program participation from equity-classified and small customer groups.	Achieve greater energy savings from all commercial segments and facilitate greater adoption of other decarb solutions such as fuel cells, renewable natural gas (RNG), hydrogen and other emerging decarb solutions.	
<b>Proposed Annual Budgets for 2024-2027*:</b>		<b>Anticipated changes in budget for years 2028-2031:</b>
2024: \$2,917,863	2025: \$2,922,894	Consistent with portfolio trend.
2026: \$2,941,150	2027: \$2,941,150	

*\*The inclusion of annual budgets does not imply or guarantee that the current third party's contract will be extended.*

<b>Program ID:</b>	<b>SCG3714</b>	<b>Card # 31</b>	
<b>Program Name:</b>	<b>IND-Strategic Energy Management</b>		
<b>Implementation Plan:</b>	<a href="https://cedars.sound-data.com/documents/download/2104/main/">https://cedars.sound-data.com/documents/download/2104/main/</a>		
<b>Portfolio Segment:</b>	Resource Acquisition	<b>Implementation Party:</b>	Local Third Party
<b>Applicable Sector:</b>	Industrial	<b>Market Sub-Sector:</b>	Multi-Sub-Sector
<b>Sector Challenge:</b>	<b>Sector Opportunity:</b>		
Current industrial-organizational practices do not realize the benefits of energy efficiency and non-energy benefits.	More permanent changes to customers' industrial practices that incorporate energy efficiency and non-energy solutions into the industrial-organizational practices.		
<b>Known Equity Concerns in the Selected Markets:</b>	<b>Proposed Solutions to Equity Concerns:</b>		
Low adoption of energy efficiency solutions by equity-classified customers, including very small/small customers.	Recruit customers that reside in DACs.		

### Program Description:

The Strategic Energy Management (SEM) program uses a multi-year customer engagement approach (structured as a series of one or more 2-year Cycles, in which a participant commits to participate for the entire cycle). It is a holistic, whole-facility approach that uses Normalized Metered Energy Consumption (NMEC) and a dynamic baseline model to determine savings from all program activities at the facility, including capital projects, maintenance and operations and retro-commissioning (RCx).

### Intervention Strategies:

Behavioral, Operational, and Maintenance: SEM and RCx  
Industry Best Sharing Practices  
Technical Assistance: Meter-based analysis

### Program Metrics:

Energy Savings, Total System Benefit, Cost-Effectiveness, GHG Reduction

### High-level description of delivery workforce including necessary scale and its risks:

All staff are already in place for contemplated scale, with minimal risks. SoCalGas staff include program manager, engineering staff, policy advisors, and account executives. Implementer staff include program manager, coaches, technical leads, modelers, and admin support.

### Market Actors necessary for success:

Market participants including utility account executives, equipment vendors and maintenance contractors, sister sites in other regions, and implementer's existing relationships.

### Transition Plan:

Transitioning from a Core PA Program to a Third Party Program in 2022/2023.

### Solicitation Strategy:

Local Third Party

### Expected Program Life:

2024 - Ongoing

### Cost Effectiveness:

TRC = 1.68; PAC = 1.28

### Short Term Plan:

Maintain active participants in the program through the three 2-year cycles described in the statewide Design Guide. Complete recruitment of a new cohort of participants.

### Long Term Outlook:

Cohorts are designed to address 5-10 large energy users per year across the SoCalGas territory. Programs deliver savings for multiple years (6 years per customer over three 2-year cycles).

### Proposed Annual Budgets for 2024-2027\*:

2024: \$2,165,607	2025: \$2,169,678
2026: \$2,173,292	2027: \$2,173,292

### Anticipated changes in budget for years 2028-2031:

Consistent with portfolio trend.

*\*The inclusion of annual budgets does not imply or guarantee that the current third party's contract will be extended.*

<b>Program ID:</b>	<b>SCG3890</b>	<b>Card # 32</b>
<b>Program Name:</b>	<b>AG-Agricultural Energy Efficiency Program</b>	
<b>Implementation Plan:</b>	<a href="https://cedars.sound-data.com/documents/download/1981/main/">https://cedars.sound-data.com/documents/download/1981/main/</a>	
<b>Portfolio Segment:</b>	Resource Acquisition	<b>Implementation Party:</b> Local Third Party
<b>Applicable Sector:</b>	Agricultural	<b>Market Sub-Sector:</b> Multi-Sub-Sector
<b>Sector Challenge:</b>	<b>Sector Opportunity:</b>	
The agricultural sector has competing priorities such as water scarcity, and crop yield, which may overshadow energy efficiency.	Increased investment in energy efficiency to lower operational costs and improve competitiveness.	
<b>Known Equity Concerns in the Selected Markets:</b>	<b>Proposed Solutions to Equity Concerns:</b>	
Many equity-classified agricultural customers, including smaller-sized customers, lack technical and financial resources to pursue energy efficiency. They also tend to have English as a second language and are located in remote rural areas, making them very hard to reach.	Provide increased and tailored deeper, comprehensive energy efficiency solutions to equity-classified customers including smaller-sized customers.	
<b>Program Description:</b>	This programs serves agricultural customers of all sizes by delivering energy efficiency solutions tailored to agricultural sector. The program identifies and works with agricultural customers to help them understand the benefits of implementing energy saving projects and measures; provides technical and project development assistance as needed; offers financial incentives and financing options; and for DAC and HTR customers, provides direct installation of certain energy saving measures.	
<b>Intervention Strategies:</b>	<b>Program Metrics:</b>	
Technical Assistance Customer Incentives: Deemed, Custom Financing	Energy Savings, Total System Benefit, Cost-Effectiveness, GHG Reduction, DAC and HTR Enrollment	
<b>High-level description of delivery workforce including necessary scale and its risks:</b>	Third-party implementor staff, trade allies, and direct installation of certain measures will be completed by contractors selected to offer direct install services.	
<b>Market Actors necessary for success:</b>	Program Administrators, delivery workforce includes third-party implementers and their trade ally network.	
<b>Transition Plan:</b>	<b>Solicitation Strategy:</b>	Local Third Party
Not applicable	<b>Expected Program Life:</b>	2024 - Ongoing
	<b>Cost Effectiveness:</b>	TRC = 0.93; PAC = 1.02
<b>Short Term Plan:</b>	<b>Long Term Outlook:</b>	
Increase program participation across all segments within the sector. Increase program participation of equity-classified and smaller-sized customers.	Increase customer adoption of energy efficiency solutions that significantly reduce carbon emissions and encourage adoption of decarbonization solutions such as renewable natural gas, hydrogen, fuel cells and others.	
<b>Proposed Annual Budgets for 2024-2027*:</b>	<b>Anticipated changes in budget for years 2028-2031:</b>	
2024: \$3,458,500      2025: \$3,470,245	Consistent with portfolio trend.	
2026: \$3,521,899      2027: \$3,521,899		

*\*The inclusion of annual budgets does not imply or guarantee that the current third party's contract will be extended.*

<b>Program ID:</b>	<b>SCG3886</b>	<b>Card # 33</b>	
<b>Program Name:</b>	<b>PUB-Public Direct Install Program</b>		
<b>Implementation Plan:</b>	<a href="https://cedars.sound-data.com/documents/download/1923/main/">https://cedars.sound-data.com/documents/download/1923/main/</a>		
<b>Portfolio Segment:</b>	Resource Acquisition	<b>Implementation Party:</b>	Local Third Party
<b>Applicable Sector:</b>	Public	<b>Market Sub-Sector:</b>	Multi-Sub-Sector
<b>Sector Challenge:</b>	Public sector-specific requirements (e.g., public contracting codes, sustainability goals, and centralized energy billing practices) create competing priorities.	<b>Sector Opportunity:</b>	Permanent modification to organizational practices to have customers automatically consider and adopt EE solutions by incorporating EE into the organization's energy mandates, policies, and procedures.
<b>Known Equity Concerns in the Selected Markets:</b>	Rural and HTR customers have less access to vendors and utility programs; Community Services Districts are under represented, and lack certain county services; Many local governments are under staffed; Need to address EE support for Native American Tribal government.	<b>Proposed Solutions to Equity Concerns:</b>	Targeted outreach and tailored solutions to rural, HTR, and other public sectors customers that are underserved. Provide turnkey programs to assist with installation and assistance.
<b>Program Description:</b>			
This program is a turnkey cost-effective end-to-end solution for SoCalGas that serves small and medium local government, federal government, and education (K-12) facilities. In addition to no-cost direct install technologies, the program offers advanced energy efficiency improvements that can be financed.			
<b>Intervention Strategies:</b>		<b>Program Metrics:</b>	
Direct Install: Standard & Comprehensive		Energy Savings, Total System Benefit, Cost-Effectiveness,	
Customer Incentives: Deemed & Bundled Measures		GHG Reduction, DAC and HTR Enrollment	
Financing: On-Bill Financing & Alternative Funding			
<b>High-level description of delivery workforce including necessary scale and its risks:</b>			
Third-Party Program Implementer staff and contractors, partnering with public sector customers and financial institutions.			
<b>Market Actors necessary for success:</b>			
Program Administrators, Third-Party Program Implementers, Contractors.			
<b>Transition Plan:</b>	<b>Solicitation Strategy:</b>		Local Third Party
Not applicable	<b>Expected Program Life:</b>		2024 - Ongoing
	<b>Cost Effectiveness:</b>		TRC = 2.21; PAC = 2.21
<b>Short Term Plan:</b>	<b>Long Term Outlook:</b>		
Increased adoption of energy efficiency solutions by customers with significant energy efficiency potential to support decarbonization efforts in municipal-owned buildings. Increase energy savings from public customers	Work with Public Sector customers to adopt long-term goals to incorporate energy efficiency into customer's organizational policies and practices.		
<b>Proposed Annual Budgets for 2024-2027*:</b>		<b>Anticipated changes in budget for years 2028-2031:</b>	
2024: \$2,317,878	2025: \$2,837,261	Consistent with portfolio trend.	
2026: \$2,858,037	2027: \$2,858,037		

*\*The inclusion of annual budgets does not imply or guarantee that the current third party's contract will be extended.*

<b>Program ID:</b>	<b>SCG3912</b>	<b>Card # 34</b>	
<b>Program Name:</b>	<b>PUB-Regional Energy Pathways</b>		
<b>Implementation Plan:</b>	<a href="https://cedars.sound-data.com/documents/download/2231/main/">https://cedars.sound-data.com/documents/download/2231/main/</a>		
<b>Portfolio Segment:</b>	Market Support	<b>Implementation Party:</b>	Core PA
<b>Applicable Sector:</b>	Public	<b>Market Sub-Sector:</b>	Multi-Sub-Sector
<b>Sector Challenge:</b>	<b>Sector Opportunity:</b>		
Public customers serving rural and disadvantaged communities are particularly impacted, demonstrated by low energy efficiency adoption levels.	Increase energy efficiency levels among public sector customers serving rural and disadvantaged communities.		
<b>Known Equity Concerns in the Selected Markets:</b>		<b>Proposed Solutions to Equity Concerns:</b>	
Low energy efficiency adoption levels indicate that public sector agencies serving rural and disadvantaged communities are particularly impacted.		SoCalGas will provide targeted outreach to Public Sector customers in Rural and HTR, and will help coordinate SoCalGas and third party programs to assist overcoming access to programs and services.	
<b>Program Description:</b>			
Public Sector Regional Energy Pathways is a transition from the existing Local Government Partnership (LGP) model. In an effort to build on successes and lessons with the LGP model, SoCalGas will update Public Sector partnering approach to ensure we are providing valuable programs and services for all Public Sector customers. The objective of this model is to maintain support for local government partners along with all Public Sector customers, and allow for more flexible engagement that demonstrates the value of regional partnering while maintaining direct relationships with existing partners and implementers as well as developing new relationships with public agencies.			
<b>Intervention Strategies:</b>		<b>Program Metrics:</b>	
Partnering: Governments (local, state, fed)		Market Support Demand, Supply and Partnership Metrics	
Partnering: Regional Ambassadors			
Partnering: Public Agencies & Municipalities			
<b>High-level description of delivery workforce including necessary scale and its risks:</b>			
The Regional Energy Pathways is a non-resource program and will be implemented by SoCalGas resources and external resources based throughout the service territory to expand knowledge of available energy efficiency resources and increase participation in programs offered by SoCalGas.			
<b>Market Actors necessary for success:</b>			
Local regional stakeholders (Regional Ambassadors). The plan is to have Regional Ambassadors throughout the SoCalGas territory as an extension of the SoCalGas helping to identify challenges and assist bringing solutions to customers.			
<b>Transition Plan:</b>	<b>Solicitation Strategy:</b>		Core PA
Not applicable	<b>Expected Program Life:</b>		2024 - Ongoing
	<b>Cost Effectiveness:</b>		Not applicable
<b>Short Term Plan:</b>	<b>Long Term Outlook:</b>		
Expand knowledge of available energy efficiency resources and increase participation in programs offered by SoCalGas.	Expand knowledge of available energy efficiency resources and increase participation in programs offered by SoCalGas.		
<b>Proposed Annual Budgets for 2024-2027:</b>		<b>Anticipated changes in budget for years 2028-2031:</b>	
2024: \$1,861,212	2025: \$1,897,491	Consistent with portfolio trend.	
2026: \$1,936,514	2027: \$1,936,514		

<b>Program ID:</b>	SCG_SW_ETP_Gas		<b>Card # 35</b>
<b>Program Name:</b>	ET-SW-Gas Emerging Technologies Program		
<b>Implementation Plan:</b>	<a href="https://cedars.sound-data.com/documents/download/2167/main/">https://cedars.sound-data.com/documents/download/2167/main/</a>		
<b>Portfolio Segment:</b>	Market Support	<b>Implementation Party:</b>	SW Third Party
<b>Applicable Sector:</b>	CC-Emerging Tech	<b>Market Sub-Sector:</b>	Not applicable
<b>Sector Challenge:</b>	Identifying emerging technologies measures to advance energy efficiency. Understanding how the market will respond to new measures. Advancing technologies suited for portfolio programs.		<b>Sector Opportunity:</b>
			Enhanced and updated Technology Priority Maps that lead to roadmaps for technologies. Solicit and meet Program Administrator requests for additional market or customer research on emerging technology measures.
<b>Known Equity Concerns in the Selected Markets:</b>	Not applicable		<b>Proposed Solutions to Equity Concerns:</b>
			Not applicable

### Program Description:

The Statewide Gas Emerging Technologies (GET) Program's vision is to achieve measurable increases in technology adoption by rapidly identifying, screening, and advancing natural gas technologies through the emerging technology (ET) cycle and into the program portfolio. Achieving higher levels of adoption is crucial for PAs and program implementers to meet energy savings goals as existing EE measures are retired or transitioned out of the portfolio. The Program design is based on a collaborative effort with targeted market and technology actors to identify and screen technologies, identify and verify key market barriers to ET adoption, and develop strategies to overcome such barriers.

### Intervention Strategies:

Technology Evaluation  
Dissemination  
Technology Transfer

### Program Metrics:

Projects Initiated, TPM Development, Outreach Events, Technology Focused Pilots, Coordination

### High-level description of delivery workforce including necessary scale and its risks:

HVAC workforce standards apply when a contractor is used to install, modify, or maintain an HVAC technology project at a non-residential customer site. Each worker or technician involved in the physical installation of the project must meet certain criteria based on apprenticeship status, journey level, and licensing.

### Market Actors necessary for success:

Program implementers, research institutions, industry organizations, energy agencies, manufacturers.

### Transition Plan:

Not applicable

### Solicitation Strategy:

SW Third Party

### Expected Program Life:

2024 - Ongoing

### Cost Effectiveness:

Not applicable

### Short Term Plan:

Scan, prioritize and evaluate commercially available energy efficiency technologies and provide data and information to help drive the adoption of measures into energy efficiency resource, equity, and market support

### Long Term Outlook:

Expand to include broader decarbonization efforts including the evaluation of renewable natural gas, hydrogen, and microgrid applications.

### Proposed Annual Budgets for 2024-2027\*:

2024: \$1,254,000      2025: \$1,254,000  
2026: \$1,254,000      2027: \$1,254,000

### Anticipated changes in budget for years 2028-2031:

Consistent with portfolio trend.

*\*The inclusion of annual budgets does not imply or guarantee that the current third party's contract will be extended.*

<b>Program ID:</b>	<b>SCG3729</b>	<b>Card # 36</b>
<b>Program Name:</b>	<b>WET&amp;O-Integrated Energy Efficiency Training Program</b>	
<b>Implementation Plan:</b>	<a href="https://cedars.sound-data.com/documents/download/2148/main/">https://cedars.sound-data.com/documents/download/2148/main/</a>	
<b>Portfolio Segment:</b>	Market Support	<b>Implementation Party:</b> Core PA
<b>Applicable Sector:</b>	CC-WET&O	<b>Market Sub-Sector:</b> WET&O
<b>Sector Challenge:</b>	Motivating, engaging, and training trade professionals, allies, market channel and customer intermediaries to prioritize installation of energy-efficiency technology and products, particularly to HTR customers and DACs.	<b>Sector Opportunity:</b> Efficiently deploy innovative education and training to a critical population of trade professionals and customer intermediaries who can greatly benefit from knowledge, skills and abilities needed to deliver quality installations.
<b>Known Equity Concerns in the Selected Markets:</b>	Smaller sized market actors are less informed on EE incentives and participating in education and training, especially those located in and servicing HTR and DACs.	<b>Proposed Solutions to Equity Concerns:</b> Increase percentage of disadvantaged workers. Increased market support for generating interest in equitable, non-financial and decarbonization benefits from delivery of customer-centric solutions to HTR customers and DACs.
<b>Program Description:</b>		
Deliver high-quality integrated educational seminars to train members of the energy efficiency workforce, including entry-level contractors, disadvantaged community members, university and community college students, architects, food service facility designers and operators, HVAC engineers, equipment installers, manufacturers, developers, and commissioning agents. Enhance training and collaborative outreach to trade professionals, market allies and customer intermediaries, expanding subsidies and market incentives for the purpose of broadening training and outreach models that increase participation in energy efficiency.		
<b>Intervention Strategies:</b>	Education & Training Technology Demonstration and Testing Market Channel Incentives	<b>Program Metrics:</b> Penetration of Trainings, Number of Participants, Diversity of Participants, Percent of disadvantaged participants trained, Market Support Demand, Supply, and Partnership
<b>High-level description of delivery workforce including necessary scale and its risks:</b>		
Workforce requirements include curriculum designers, instructors, and channels of distribution. There are subject-matter experts with many retiring workers. A disruption to economy or channels of access to trade professionals, market allies or customer intermediaries could pose a risk to program effectiveness.		
<b>Market Actors necessary for success:</b>		
Trade Professionals (i.e. contractors); Contractor Associations; Market Allies (i.e. product developers and distributors), Instructors; Resource Acquisition Programs; Customer Intermediaries (i.e. Realtor agents)		
<b>Transition Plan:</b>	Not applicable	<b>Solicitation Strategy:</b> Core PA
		<b>Expected Program Life:</b> 2024 - Ongoing
		<b>Cost Effectiveness:</b> Not applicable
<b>Short Term Plan:</b>	Benchmark reach and participation in 2022-2023	<b>Long Term Outlook:</b> Maintain consistent level of reach and engagement in training and outreach implemented campaigns.
<b>Proposed Annual Budgets for 2024-2027:</b>		<b>Anticipated changes in budget for years 2028-2031:</b>
2024: \$3,622,400	2025: \$3,671,745	Consistent with portfolio trend.
2026: \$3,726,717	2027: \$3,726,717	

<b>Program ID:</b>	<b>SCG3760</b>	<b>Card # 37</b>	
<b>Program Name:</b>	<b>WET&amp;O-HERS Rater Training Program</b>		
<b>Implementation Plan:</b>	<a href="https://cedars.sound-data.com/documents/download/2166/main/">https://cedars.sound-data.com/documents/download/2166/main/</a>		
<b>Portfolio Segment:</b>	Market Support	<b>Implementation Party:</b>	Local Third Party
<b>Applicable Sector:</b>	CC-WET&O	<b>Market Sub-Sector:</b>	Not applicable
<b>Sector Challenge:</b>	<b>Sector Opportunity:</b>		
Coordination across sectors to recruit, inform and enroll customer intermediaries seeking or requiring Energy Rater certification.	Opportunity to increase the probability for market intermediaries and trade professionals to remain knowledgeable and skilled with abilities to service end-use customers.		
<b>Known Equity Concerns in the Selected Markets:</b>	<b>Proposed Solutions to Equity Concerns:</b>		
Small trade professionals, market allies and customer intermediaries less informed on energy efficiency incentives and participating in education and training.	Not applicable		

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**Program Description:**

The program promotes, develops, and delivers training to currently certified Home Energy Rating System (HERS) raters, energy analysts, HVAC technicians, building department officials, other building trade professionals, residential homeowners, and technical students with a focus on participants involved in new and existing engineering and construction. The curriculum addresses technical and administrative elements of energy ratings, energy efficiency standards including changes based on updated Title 24 requirements, and industry best practices.

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**Intervention Strategies:**

Education & Training: Home Energy Rating System  
Education & Training: Contractor Training

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**Program Metrics:**

Market Support Workforce Education and Training Metrics

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**High-level description of delivery workforce including necessary scale and its risks:**

Workforce requirements include curriculum designers, instructors, and channels of distribution. There are subject-matter experts with many retiring workers. Disruption to housing economy or channels of access to trade professionals, specifically to Home Energy Raters, could pose a risk to program effectiveness.

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**Market Actors necessary for success:**

Third-party implementer, contractors, trade professionals.

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**Transition Plan:**

Not applicable

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**Solicitation Strategy:**

Local Third Party

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**Expected Program Life:**

2024 - Ongoing

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**Cost Effectiveness:**

Not applicable

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**Short Term Plan:**

Benchmark participation in 2022-2023. Establish performance levels

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**Long Term Outlook:**

Maintain consistent reach and level of participation in training certifications - benchmarks needed.

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**Proposed Annual Budgets for 2024-2027\*:**

2024: \$483,706	2025: \$484,470
2026: \$485,088	2027: \$485,088

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**Anticipated changes in budget for years 2028-2031:**

Consistent with portfolio trend.

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*\*The inclusion of annual budgets does not imply or guarantee that the current third party's contract will be extended.*

<b>Program ID:</b>	<b>SCG3764</b>	<b>Card # 38</b>	
<b>Program Name:</b>	<b>WET&amp;O-Educational Outreach Program</b>		
<b>Implementation Plan:</b>	<a href="https://cedars.sound-data.com/documents/download/2158/main/">https://cedars.sound-data.com/documents/download/2158/main/</a>		
<b>Portfolio Segment:</b>	Resource Acquisition	<b>Implementation Party:</b>	Local Third Party
<b>Applicable Sector:</b>	CC-WET&O	<b>Market Sub-Sector:</b>	Multi-Sub-Sector
<b>Sector Challenge:</b>	<b>Sector Opportunity:</b>		
Lack of awareness of program offerings and services.	Increased customer awareness on the availability and access to both statewide and local offerings.		

<b>Known Equity Concerns in the Selected Markets:</b>	<b>Proposed Solutions to Equity Concerns:</b>
Low participation across the residential sector, especially in the equity-classified customer groups.	Cross promote with other programs to provide energy efficiency to HTR and DAC customers.

**Program Description:**

The program is a school-delivered residential energy savings program that provides a blend of classroom activities and take-home energy efficiency kit retrofit and audit projects which students complete as homework assignments with their parents and families. Audit data and installation reports are collected via surveys, which are returned to teachers and forwarded for tabulation and storage. The program is applied at the 6th Grade level in California to best align with State Learning Standards, and is offered to eligible teachers as an elective program.

<b>Intervention Strategies:</b>	<b>Program Metrics:</b>
Energy Audits	Energy Savings, Total System Benefit, Cost-Effectiveness, GHG Reduction
Education & Training: K-12 Education	
Customer Incentives: Kits at no-cost	

**High-level description of delivery workforce including necessary scale and its risks:**

Delivery workforce includes third-party implementers and their kit manufacturer.

**Market Actors necessary for success:**

Collaboration with local electric utilities and water agencies to fund the kits and expand educational objectives to include electric and water savings measures whenever possible.

<b>Transition Plan:</b>	<b>Solicitation Strategy:</b>	Local Third Party
Not applicable	<b>Expected Program Life:</b>	2024 - Ongoing
	<b>Cost Effectiveness:</b>	TRC = 5.08; PAC = 5.08
<b>Short Term Plan:</b>	<b>Long Term Outlook:</b>	
Continue providing educational materials and energy efficiency kits to school teachers and students to promote.	Expand curriculum to include other clean energy technologies, decarbonization and GHG reduction.	

<b>Proposed Annual Budgets for 2024-2027*:</b>	<b>Anticipated changes in budget for years 2028-2031:</b>
2024: \$1,769,941      2025: \$1,774,207	Consistent with portfolio trend.
2026: \$1,778,172      2027: \$1,778,172	

*\*The inclusion of annual budgets does not imply or guarantee that the current third party's contract will be extended.*

<b>Program ID:</b>	<b>SCG3830</b>	<b>Card # 39</b>
<b>Program Name:</b>	<b>WET&amp;O-Retail Partner Training Program</b>	
<b>Implementation Plan:</b>	<a href="https://cedars.sound-data.com/documents/download/2163/main/">https://cedars.sound-data.com/documents/download/2163/main/</a>	
<b>Portfolio Segment:</b>	Market Support	<b>Implementation Party:</b> Local Third Party
<b>Applicable Sector:</b>	CC-WET&O	<b>Market Sub-Sector:</b> Outreach
<b>Sector Challenge:</b>	Communication barriers exist between retailers/contractors and customers leading to information on energy efficiency programs and products not being presented effectively to customers.	<b>Sector Opportunity:</b> More ongoing communication and updates to the retailers on qualifying equipment and rebate offerings that are presented to customers in an effective manner.
<b>Known Equity Concerns in the Selected Markets:</b>	Customers are often not aware of the true savings potential associated with energy efficient measures nor are they familiar with the many energy efficient qualifying products and rebates that are available to customers.	<b>Proposed Solutions to Equity Concerns:</b> The program offers retailers, manufacturers, distributors and contractors, within DACs, with the education and training needed on energy efficiency rebates and products so they can inform customers to make energy efficient choices before they make their purchase.
<b>Program Description:</b>	The program provides a comprehensive overview of SoCalGas' rebate programs to customer intermediary personnel, contractors and manufacturers of energy efficient products and services. In addition, the program facilitates placement of utility marketing materials to ensure rebate promotion and brand recognition. The program focuses on visits to large retailers and will expand services to small businesses serving customers in disadvantaged communities.	
<b>Intervention Strategies:</b>	Education & Training: Retailer Market Support Education & Training: Contractor Training Education & Training: Distributor Training	<b>Program Metrics:</b> Market Support Supply and Partnership Metrics
<b>High-level description of delivery workforce including necessary scale and its risks:</b>	Workforce requirements include technically knowledgeable and skilled communication specialists. A disruption to economy or channels of access to customer intermediaries, such as retailers or energy equipment distributors, could pose a risk to program effectiveness.	
<b>Market Actors necessary for success:</b>	Program Administrators, Third-Party Implementer, Contractors, Distributors, Manufacturers.	
<b>Transition Plan:</b>	Program to be solicited in 2022.	<b>Solicitation Strategy:</b> Local Third Party
		<b>Expected Program Life:</b> 2024 - Ongoing
		<b>Cost Effectiveness:</b> Not applicable
<b>Short Term Plan:</b>	Benchmark current effects of engagement and account relations.	<b>Long Term Outlook:</b> Increase participation from small and medium businesses serving as customer intermediaries within DACs.
<b>Proposed Annual Budgets for 2024-2027*:</b>	2024: \$1,352,371 2025: \$1,355,011 2026: \$1,357,355 2027: \$1,357,355	<b>Anticipated changes in budget for years 2028-2031:</b> Consistent with portfolio trend.

*\*The inclusion of annual budgets does not imply or guarantee that the current third party's contract will be extended.*

<b>Program ID:</b>	<b>SCG3735</b>	<b>Card # 40</b>	
<b>Program Name:</b>	<b>FIN-On-Bill Financing</b>		
<b>Implementation Plan:</b>	<a href="https://cedars.sound-data.com/documents/download/2146/main/">https://cedars.sound-data.com/documents/download/2146/main/</a>		
<b>Portfolio Segment:</b>	Market Support	<b>Implementation Party:</b>	Core PA
<b>Applicable Sector:</b>	CC-Finance	<b>Market Sub-Sector:</b>	Not applicable
<b>Sector Challenge:</b>	<b>Sector Opportunity:</b>		
Long lead time required for project pre-approval and loan disbursement. For certain financing programs, customer or contractor must front the upgrade cost and wait for reimbursement after project completion.	Integrate financing options with EE programs. Introduce electronic signatures for loan agreements. Educate contractors on financing options to prepare when presenting solutions to customers.		
<b>Known Equity Concerns in the Selected Markets:</b>	<b>Proposed Solutions to Equity Concerns:</b>		
Availability and access to energy efficiency financing options for underserved customers including HTR, DAC, and low credit score customers.	Continue to provide access to low credit score customers either through On-Bill Financing or partnering with private capital.		

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**Program Description:**

Zero percent financing available for Non-Residential customers who purchase and install eligible energy efficient measures. The program offers customers an opportunity to overcome upfront cash barriers to proceed with energy efficiency retrofits.

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**Intervention Strategies:**

Financing: On-Bill Financing  
 Program Coordination: Integration with Programs  
 Education & Training: Contractor Training

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**Program Metrics:**

Loan Volume and Market Support Access to Capital Metrics

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**High-level description of delivery workforce including necessary scale and its risks:**

Emphasis on education of contractors and third-party implementers to promote financing as a tool to convert more projects.

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**Market Actors necessary for success:**

Program Administrator, third-party implementers, contractors.

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**Transition Plan:**

Not applicable

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**Solicitation Strategy:**

Core PA

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**Expected Program Life:**

2024 - Ongoing

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**Cost Effectiveness:**

Not applicable

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**Short Term Plan:**

Create awareness of program and increase web traffic through coordinated efforts with internal and external parties.

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**Long Term Outlook:**

Increase program participation by modifying program requirements to provide access to all customers.

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**Proposed Annual Budgets for 2024-2027:**

2024: \$525,448	2025: \$532,118
2026: \$540,828	2027: \$540,828

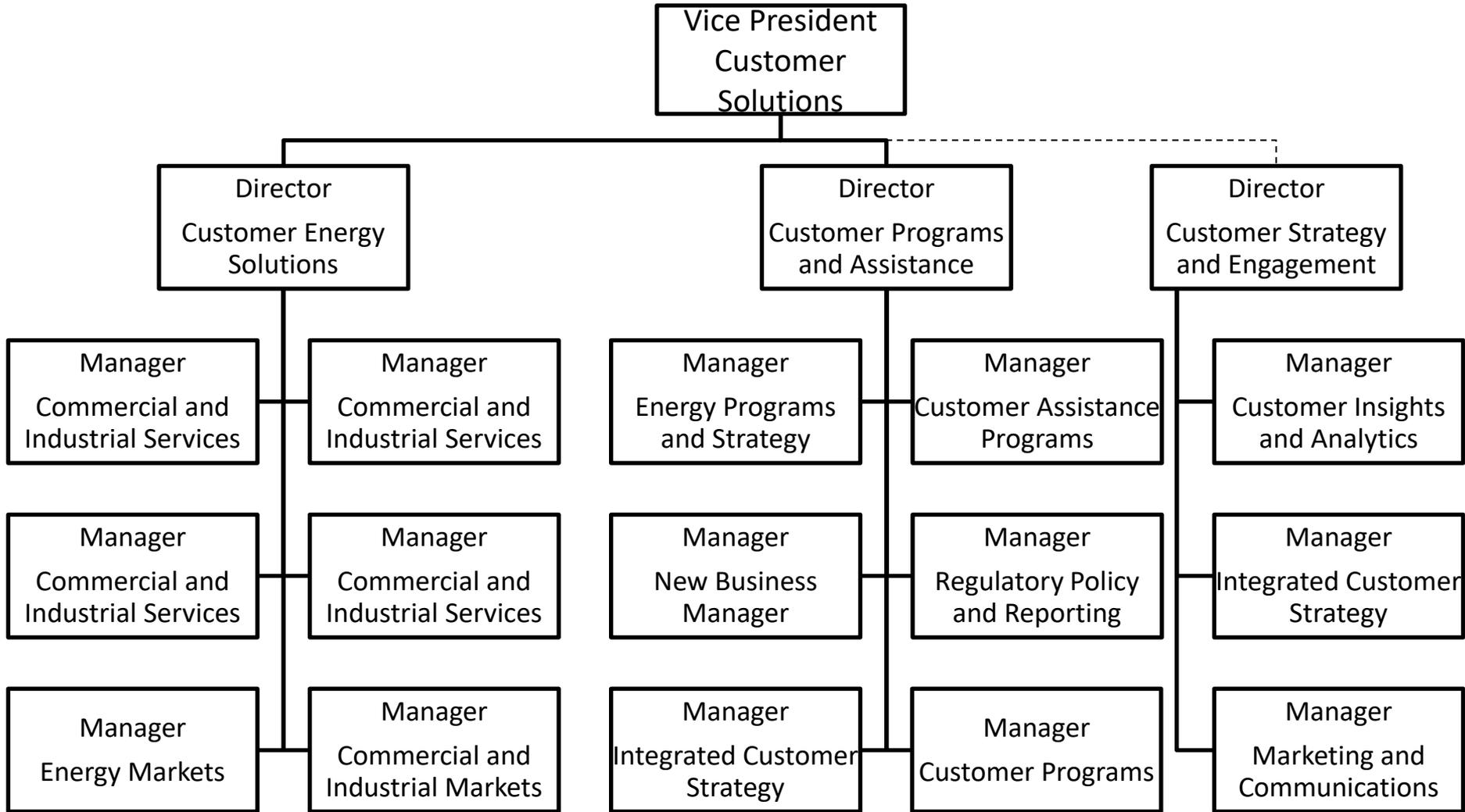
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**Anticipated changes in budget for years 2028-2031:**

Consistent with portfolio trend.

# Appendix D

## Departments/Organization Supporting Energy Efficiency Portfolio



# Appendix E

## 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: 2024

Submitted: 20:26:04 on 03 Mar 2022

By: Tony Chun

Advice Letter Number: A.22-03-XXX

### \* Portfolio Budget Filing Summary \*

- TRC: 1.06
- PAC: 1.97
- TRC (no admin): 1.58
- PAC (no admin): 5.0
- RIM: 1.8
- Budget: \$151,687,539.43
- TotalSystemBenefit: \$316,092,209.88
- ElecBen: \$127,056,570.21
- GasBen: \$177,264,668.17
- OtherBen: \$0.00
- TRCCost: \$285,927,781.65
- PACCost: \$154,600,332.36

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

- SCG3701: RES-Residential Energy Advisor
- SCG3702: RES-Residential Energy Efficiency Program
- SCG3705: RES-Multifamily Whole Building Program (Equity)
- SCG3707: RES-RNC
- SCG3714: IND-Strategic Energy Management
- SCG3729: WET&O-Integrated; Energy Efficiency Training
- SCG3735: FIN-On-Bill Financing
- SCG3760: WET&O-HERS; Rater Training Advancement
- SCG3764: WET&O-Educational; Outreach Program
- SCG3771: SOL-IDEEA365 Solicitations

- SCG3772: EM&V-Evaluation; Measurement & Verification
- SCG3813: COM-Savings By Design
- SCG3824: RES-Residential Behavioral Program
- SCG3829: RES-Marketplace
- SCG3830: WET&O-Retail; Partnering Training Program
- SCG3831: RES-EE Kit Delivery Program
- SCG3832: RES-Pasadena Water & Power Home Upgrade Program
- SCG3833: RES-Burbank Water & Power Home Upgrade Program
- SCG3834: COM-LADWP Direct Install
- SCG3861: RES-Community Language Efficiency Outreach Program
- SCG3882: COM-Small and Medium Commercial EE Program (Resource Acquisition)
- SCG3883: RES-Residential Advanced Clean Energy Program (Resource Acquisition)
- SCG3884: RES-Comprehensive Mobile Home Program
- SCG3885: RES-Residential Mobile Home Program
- SCG3886: PUB-Public Direct Install Program
- SCG3887: COM-Commercial-BEST (Resource Acquisition)
- SCG3888: RES-Multifamily Space and Water Heating Controls
- SCG3889: RES-Multifamily Energy Alliance Program (Resource Acquisition)
- SCG3890: AG-Agriculture Energy Efficiency Program
- SCG3891: COM-Service RCx Large Commercial Program
- SCG3892: COM-Large Commercial Energy Efficiency Program
- SCG3898: COM-Nonresidential Behavioral Program
- SCG3899: PUB-Large Public Sector EE Solicitation
- SCG3900: IND-Solicitation
- SCG3901: WET&O-Energy; Program Outreach
- SCG3909: CC-Nonresidential Energy Advisor Program
- SCG3910: CC-Nonresidential Calculated Incentives
- SCG3911: CC-Nonresidential Deemed Incentives
- SCG3912: PUB-Regional Energy Pathways
- SCG3913: PUB-REN Fiscal Management & Coordination
- SCG3937: COM-Small and Medium Commercial EE Program (Equity)
- SCG3938: RES-Multifamily Whole Building Program (Resource Acquisition)
- SCG3939: COM-Strategic Energy Management
- SCG3940: COM-Commercial-BEST (Equity)
- SCG3941: CC-Sustainability Studio
- 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, Gas
- SCG\_SW\_ETP\_Gas\_PA: ET-SW-Emerging Technologies, Gas-PA
- SCG\_SW\_FS: COM-SW-Point of Sale Food Service
- SCG\_SW\_FS\_PA: COM-SW-Point of Sale Food Service-PA
- SCG\_SW\_HVAC\_QIQM: RES-SW-HVAC QI/QM Program
- SCG\_SW\_HVAC\_QIQM\_PA: RES-SW-HVAC QI/QM Program-PA
- SCG\_SW\_HVAC\_Up\_Com: COM-SW-HVAC Upstream Commercial
- SCG\_SW\_HVAC\_Up\_Com\_PA: COM-SW-HVAC Upstream Commercial-PA
- SCG\_SW\_HVAC\_Up\_Res: RES-SW-HVAC Upstream Residential
- SCG\_SW\_HVAC\_Up\_Res\_PA: RES-SW-HVAC Upstream Residential-PA
- SCG\_SW\_IP\_Colleges: PUB-SW-Institutional Partnership-Colleges
- SCG\_SW\_IP\_Colleges\_PA: PUB-SW-Institutional Partnership-Colleges-PA
- SCG\_SW\_IP\_Gov: PUB-SW-Institutional Partnership-Government
- SCG\_SW\_IP\_Gov\_PA: PUB-SW-Institutional Partnership-Government-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-New Construction-Nonresidential-Mixed Fuel
- SCG\_SW\_NC\_NonRes\_Ag\_mixed\_PA: AG-SW-New Construction-Nonresidential-Mixed Fuel-PA
- SCG\_SW\_NC\_NonRes\_Com\_mixed: COM-SW-New Construction-Nonresidential-Mixed Fuel
- SCG\_SW\_NC\_NonRes\_Com\_mixed\_PA: COM-SW-New Construction-Nonresidential-Mixed Fuel-PA
- SCG\_SW\_NC\_NonRes\_Ind\_mixed: IND-SW-New Construction-Nonresidential-Mixed Fuel
- SCG\_SW\_NC\_NonRes\_Ind\_mixed\_PA: IND-SW-New Construction-Nonresidential-Mixed Fuel-PA
- SCG\_SW\_NC\_NonRes\_Pub\_mixed: PUB-SW-New Construction-Nonresidential-Mixed Fuel
- SCG\_SW\_NC\_NonRes\_Pub\_mixed\_PA: PUB-SW-New Construction-Nonresidential-Mixed Fuel-PA
- SCG\_SW\_NC\_NonRes\_Res\_mixed: RES-SW-New Construction-Nonresidential-Mixed Fuel
- SCG\_SW\_NC\_NonRes\_Res\_mixed\_PA: RES-SW-New Construction-Nonresidential-Mixed Fuel-PA
- SCG\_SW\_NC\_Res\_Mixed: RES-SW-New Construction-Residential-Mixed Fuel
- SCG\_SW\_NC\_Res\_Mixed\_PA: RES-SW-New Construction-Residential-Mixed Fuel-PA
- SCG\_SW\_PLA: RES-SW-Plug Load and Appliances
- SCG\_SW\_PLA\_PA: RES-SW-Plug Load and Appliances-PA
- SCG\_SW\_WET\_CC: WET&O-SW-WE;&T; Career Connections
- SCG\_SW\_WET\_CC\_PA: WET&O-SW-WE;&T; Career Connections-PA
- SCG\_SW\_WET\_Work: WET&O-SW-WE;&T; Career and Workforce Readiness
- SCG\_SW\_WET\_Work\_PA: WET&O-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: 2025

Submitted: 20:28:49 on 03 Mar 2022

By: Tony Chun

Advice Letter Number: A.22-03-XXX

### \* Portfolio Budget Filing Summary \*

- TRC: 1.07
- PAC: 1.95
- TRC (no admin): 1.6
- PAC (no admin): 4.99
- RIM: 1.77
- Budget: \$152,297,750.70
- TotalSystemBenefit: \$316,063,314.17
- ElecBen: \$116,925,661.79
- GasBen: \$186,722,311.95
- OtherBen: \$0.00
- TRCCost: \$283,726,268.39
- PACCost: \$155,396,249.13

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

- SCG3701: RES-Residential Energy Advisor
- SCG3702: RES-Residential Energy Efficiency Program
- SCG3705: RES-Multifamily Whole Building Program (Equity)
- SCG3714: IND-Strategic Energy Management
- SCG3729: WET&O-Integrated; Energy Efficiency Training
- SCG3735: FIN-On-Bill Financing
- SCG3760: WET&O-HERS; Rater Training Advancement
- SCG3764: WET&O-Educational; Outreach Program
- SCG3771: SOL-IDEEA365 Solicitations
- SCG3772: EM&V-Evaluation; Measurement & Verification

- SCG3813: COM-Savings By Design
- SCG3824: RES-Residential Behavioral Program
- SCG3829: RES-Marketplace
- SCG3830: WET&O-Retail; Partnering Training Program
- SCG3831: RES-EE Kit Delivery Program
- SCG3832: RES-Pasadena Water & Power Home Upgrade Program
- SCG3833: RES-Burbank Water & Power Home Upgrade Program
- SCG3834: COM-LADWP Direct Install
- SCG3861: RES-Community Language Efficiency Outreach Program
- SCG3882: COM-Small and Medium Commercial EE Program (Resource Acquisition)
- SCG3883: RES-Residential Advanced Clean Energy Program (Resource Acquisition)
- SCG3884: RES-Comprehensive Mobile Home Program
- SCG3885: RES-Residential Mobile Home Program
- SCG3886: PUB-Public Direct Install Program
- SCG3887: COM-Commercial-BEST (Resource Acquisition)
- SCG3888: RES-Multifamily Space and Water Heating Controls
- SCG3889: RES-Multifamily Energy Alliance Program (Resource Acquisition)
- SCG3890: AG-Agriculture Energy Efficiency Program
- SCG3891: COM-Service RCx Large Commercial Program
- SCG3892: COM-Large Commercial Energy Efficiency Program
- SCG3898: COM-Nonresidential Behavioral Program
- SCG3899: PUB-Large Public Sector EE Solicitation
- SCG3900: IND-Solicitation
- SCG3901: WET&O-Energy; Program Outreach
- SCG3909: CC-Nonresidential Energy Advisor Program
- SCG3910: CC-Nonresidential Calculated Incentives
- SCG3911: CC-Nonresidential Deemed Incentives
- SCG3912: PUB-Regional Energy Pathways
- SCG3913: PUB-REN Fiscal Management & Coordination
- SCG3937: COM-Small and Medium Commercial EE Program (Equity)
- SCG3938: RES-Multifamily Whole Building Program (Resource Acquisition)
- SCG3939: COM-Strategic Energy Management
- SCG3940: COM-Commercial-BEST (Equity)
- SCG3941: CC-Sustainability Studio
- 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, Gas
- SCG\_SW\_ETP\_Gas\_PA: ET-SW-Emerging Technologies, Gas-PA
- SCG\_SW\_FS: COM-SW-Point of Sale Food Service
- SCG\_SW\_FS\_PA: COM-SW-Point of Sale Food Service-PA
- SCG\_SW\_HVAC\_QIQM: RES-SW-HVAC QI/QM Program
- SCG\_SW\_HVAC\_QIQM\_PA: RES-SW-HVAC QI/QM Program-PA
- SCG\_SW\_HVAC\_Up\_Com: COM-SW-HVAC Upstream Commercial
- SCG\_SW\_HVAC\_Up\_Com\_PA: COM-SW-HVAC Upstream Commercial-PA
- SCG\_SW\_HVAC\_Up\_Res: RES-SW-HVAC Upstream Residential
- SCG\_SW\_HVAC\_Up\_Res\_PA: RES-SW-HVAC Upstream Residential-PA
- SCG\_SW\_IP\_Colleges: PUB-SW-Institutional Partnership-Colleges
- SCG\_SW\_IP\_Colleges\_PA: PUB-SW-Institutional Partnership-Colleges-PA
- SCG\_SW\_IP\_Gov: PUB-SW-Institutional Partnership-Government
- SCG\_SW\_IP\_Gov\_PA: PUB-SW-Institutional Partnership-Government-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-New Construction-Nonresidential-Mixed Fuel
- SCG\_SW\_NC\_NonRes\_Ag\_mixed\_PA: AG-SW-New Construction-Nonresidential-Mixed Fuel-PA
- SCG\_SW\_NC\_NonRes\_Com\_mixed: COM-SW-New Construction-Nonresidential-Mixed Fuel
- SCG\_SW\_NC\_NonRes\_Com\_mixed\_PA: COM-SW-New Construction-Nonresidential-Mixed Fuel-PA
- SCG\_SW\_NC\_NonRes\_Ind\_mixed: IND-SW-New Construction-Nonresidential-Mixed Fuel
- SCG\_SW\_NC\_NonRes\_Ind\_mixed\_PA: IND-SW-New Construction-Nonresidential-Mixed Fuel-PA
- SCG\_SW\_NC\_NonRes\_Pub\_mixed: PUB-SW-New Construction-Nonresidential-Mixed Fuel
- SCG\_SW\_NC\_NonRes\_Pub\_mixed\_PA: PUB-SW-New Construction-Nonresidential-Mixed Fuel-PA
- SCG\_SW\_NC\_NonRes\_Res\_mixed: RES-SW-New Construction-Nonresidential-Mixed Fuel
- SCG\_SW\_NC\_NonRes\_Res\_mixed\_PA: RES-SW-New Construction-Nonresidential-Mixed Fuel-PA
- SCG\_SW\_NC\_Res\_Mixed: RES-SW-New Construction-Residential-Mixed Fuel
- SCG\_SW\_NC\_Res\_Mixed\_PA: RES-SW-New Construction-Residential-Mixed Fuel-PA
- SCG\_SW\_PLA: RES-SW-Plug Load and Appliances
- SCG\_SW\_PLA\_PA: RES-SW-Plug Load and Appliances-PA
- SCG\_SW\_WET\_CC: WET&O-SW-WE;&T; Career Connections
- SCG\_SW\_WET\_CC\_PA: WET&O-SW-WE;&T; Career Connections-PA
- SCG\_SW\_WET\_Work: WET&O-SW-WE;&T; Career and Workforce Readiness
- SCG\_SW\_WET\_Work\_PA: WET&O-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: 2026

Submitted: 20:31:16 on 03 Mar 2022

By: Tony Chun

Advice Letter Number: A.22-03-XXX

### \* Portfolio Budget Filing Summary \*

- TRC: 1.07
- PAC: 1.93
- TRC (no admin): 1.62
- PAC (no admin): 4.93
- RIM: 1.75
- Budget: \$153,091,119.87
- TotalSystemBenefit: \$314,542,214.67
- ElecBen: \$112,816,918.64
- GasBen: \$188,645,776.87
- OtherBen: \$0.00
- TRCCost: \$281,255,315.64
- PACCost: \$156,361,341.61

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

- SCG3701: RES-Residential Energy Advisor
- SCG3702: RES-Residential Energy Efficiency Program
- SCG3705: RES-Multifamily Whole Building Program (Equity)
- SCG3714: IND-Strategic Energy Management
- SCG3729: WET&O-Integrated; Energy Efficiency Training
- SCG3735: FIN-On-Bill Financing
- SCG3760: WET&O-HERS; Rater Training Advancement
- SCG3764: WET&O-Educational; Outreach Program
- SCG3771: SOL-IDEEA365 Solicitations
- SCG3772: EM&V-Evaluation; Measurement & Verification

- SCG3824: RES-Residential Behavioral Program
- SCG3829: RES-Marketplace
- SCG3830: WET&O-Retail; Partnering Training Program
- SCG3831: RES-EE Kit Delivery Program
- SCG3832: RES-Pasadena Water & Power Home Upgrade Program
- SCG3833: RES-Burbank Water & Power Home Upgrade Program
- SCG3834: COM-LADWP Direct Install
- SCG3861: RES-Community Language Efficiency Outreach Program
- SCG3882: COM-Small and Medium Commercial EE Program (Resource Acquisition)
- SCG3883: RES-Residential Advanced Clean Energy Program (Resource Acquisition)
- SCG3884: RES-Comprehensive Mobile Home Program
- SCG3885: RES-Residential Mobile Home Program
- SCG3886: PUB-Public Direct Install Program
- SCG3887: COM-Commercial-BEST (Resource Acquisition)
- SCG3888: RES-Multifamily Space and Water Heating Controls
- SCG3889: RES-Multifamily Energy Alliance Program (Resource Acquisition)
- SCG3890: AG-Agriculture Energy Efficiency Program
- SCG3891: COM-Service RCx Large Commercial Program
- SCG3892: COM-Large Commercial Energy Efficiency Program
- SCG3898: COM-Nonresidential Behavioral Program
- SCG3899: PUB-Large Public Sector EE Solicitation
- SCG3900: IND-Solicitation
- SCG3901: WET&O-Energy; Program Outreach
- SCG3909: CC-Nonresidential Energy Advisor Program
- SCG3910: CC-Nonresidential Calculated Incentives
- SCG3911: CC-Nonresidential Deemed Incentives
- SCG3912: PUB-Regional Energy Pathways
- SCG3913: PUB-REN Fiscal Management & Coordination
- SCG3937: COM-Small and Medium Commercial EE Program (Equity)
- SCG3938: RES-Multifamily Whole Building Program (Resource Acquisition)
- SCG3939: COM-Strategic Energy Management
- SCG3940: COM-Commercial-BEST (Equity)
- SCG3941: CC-Sustainability Studio
- 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, Gas

- SCG\_SW\_ETP\_Gas\_PA: ET-SW-Emerging Technologies, Gas-PA
- SCG\_SW\_FS: COM-SW-Point of Sale Food Service
- SCG\_SW\_FS\_PA: COM-SW-Point of Sale Food Service-PA
- SCG\_SW\_HVAC\_QIQM: RES-SW-HVAC QI/QM Program
- SCG\_SW\_HVAC\_QIQM\_PA: RES-SW-HVAC QI/QM Program-PA
- SCG\_SW\_HVAC\_Up\_Com: COM-SW-HVAC Upstream Commercial
- SCG\_SW\_HVAC\_Up\_Com\_PA: COM-SW-HVAC Upstream Commercial-PA
- SCG\_SW\_HVAC\_Up\_Res: RES-SW-HVAC Upstream Residential
- SCG\_SW\_HVAC\_Up\_Res\_PA: RES-SW-HVAC Upstream Residential-PA
- SCG\_SW\_IP\_Colleges: PUB-SW-Institutional Partnership-Colleges
- SCG\_SW\_IP\_Colleges\_PA: PUB-SW-Institutional Partnership-Colleges-PA
- SCG\_SW\_IP\_Gov: PUB-SW-Institutional Partnership-Government
- SCG\_SW\_IP\_Gov\_PA: PUB-SW-Institutional Partnership-Government-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-New Construction-Nonresidential-Mixed Fuel
- SCG\_SW\_NC\_NonRes\_Ag\_mixed\_PA: AG-SW-New Construction-Nonresidential-Mixed Fuel-PA
- SCG\_SW\_NC\_NonRes\_Com\_mixed: COM-SW-New Construction-Nonresidential-Mixed Fuel
- SCG\_SW\_NC\_NonRes\_Com\_mixed\_PA: COM-SW-New Construction-Nonresidential-Mixed Fuel-PA
- SCG\_SW\_NC\_NonRes\_Ind\_mixed: IND-SW-New Construction-Nonresidential-Mixed Fuel
- SCG\_SW\_NC\_NonRes\_Ind\_mixed\_PA: IND-SW-New Construction-Nonresidential-Mixed Fuel-PA
- SCG\_SW\_NC\_NonRes\_Pub\_mixed: PUB-SW-New Construction-Nonresidential-Mixed Fuel
- SCG\_SW\_NC\_NonRes\_Pub\_mixed\_PA: PUB-SW-New Construction-Nonresidential-Mixed Fuel-PA
- SCG\_SW\_NC\_NonRes\_Res\_mixed: RES-SW-New Construction-Nonresidential-Mixed Fuel
- SCG\_SW\_NC\_NonRes\_Res\_mixed\_PA: RES-SW-New Construction-Nonresidential-Mixed Fuel-PA
- SCG\_SW\_NC\_Res\_Mixed: RES-SW-New Construction-Residential-Mixed Fuel
- SCG\_SW\_NC\_Res\_Mixed\_PA: RES-SW-New Construction-Residential-Mixed Fuel-PA
- SCG\_SW\_PLA: RES-SW-Plug Load and Appliances
- SCG\_SW\_PLA\_PA: RES-SW-Plug Load and Appliances-PA
- SCG\_SW\_WET\_CC: WET&O-SW-WE;&T; Career Connections
- SCG\_SW\_WET\_CC\_PA: WET&O-SW-WE;&T; Career Connections-PA
- SCG\_SW\_WET\_Work: WET&O-SW-WE;&T; Career and Workforce Readiness
- SCG\_SW\_WET\_Work\_PA: WET&O-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: 2027

Submitted: 20:41:37 on 03 Mar 2022

By: Tony Chun

Advice Letter Number: A.22-03-XXX

### \* Portfolio Budget Filing Summary \*

- TRC: 1.09
- PAC: 1.93
- TRC (no admin): 1.67
- PAC (no admin): 4.94
- RIM: 1.75
- Budget: \$154,627,592.81
- TotalSystemBenefit: \$319,541,568.32
- ElecBen: \$109,883,667.28
- GasBen: \$195,911,073.24
- OtherBen: \$0.00
- TRCCost: \$279,656,072.02
- PACCost: \$158,041,858.97

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

- SCG3701: RES-Residential Energy Advisor
- SCG3702: RES-Residential Energy Efficiency Program
- SCG3705: RES-Multifamily Whole Building Program (Equity)
- SCG3714: IND-Strategic Energy Management
- SCG3729: WET&O-Integrated; Energy Efficiency Training
- SCG3735: FIN-On-Bill Financing
- SCG3760: WET&O-HERS; Rater Training Advancement
- SCG3764: WET&O-Educational; Outreach Program
- SCG3771: SOL-IDEEA365 Solicitations
- SCG3772: EM&V-Evaluation; Measurement & Verification

- SCG3824: RES-Residential Behavioral Program
- SCG3829: RES-Marketplace
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- SCG3832: RES-Pasadena Water & Power Home Upgrade Program
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- SCG3884: RES-Comprehensive Mobile Home Program
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- SCG3889: RES-Multifamily Energy Alliance Program (Resource Acquisition)
- SCG3890: AG-Agriculture Energy Efficiency Program
- SCG3891: COM-Service RCx Large Commercial Program
- SCG3892: COM-Large Commercial Energy Efficiency Program
- SCG3898: COM-Nonresidential Behavioral Program
- SCG3899: PUB-Large Public Sector EE Solicitation
- SCG3900: IND-Solicitation
- SCG3901: WET&O-Energy; Program Outreach
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- SCG3937: COM-Small and Medium Commercial EE Program (Equity)
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- SCG3939: COM-Strategic Energy Management
- SCG3940: COM-Commercial-BEST (Equity)
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- 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, Gas

- SCG\_SW\_ETP\_Gas\_PA: ET-SW-Emerging Technologies, Gas-PA
- SCG\_SW\_FS: COM-SW-Point of Sale Food Service
- SCG\_SW\_FS\_PA: COM-SW-Point of Sale Food Service-PA
- SCG\_SW\_HVAC\_QIQM: RES-SW-HVAC QI/QM Program
- SCG\_SW\_HVAC\_QIQM\_PA: RES-SW-HVAC QI/QM Program-PA
- SCG\_SW\_HVAC\_Up\_Com: COM-SW-HVAC Upstream Commercial
- SCG\_SW\_HVAC\_Up\_Com\_PA: COM-SW-HVAC Upstream Commercial-PA
- SCG\_SW\_HVAC\_Up\_Res: RES-SW-HVAC Upstream Residential
- SCG\_SW\_HVAC\_Up\_Res\_PA: RES-SW-HVAC Upstream Residential-PA
- SCG\_SW\_IP\_Colleges: PUB-SW-Institutional Partnership-Colleges
- SCG\_SW\_IP\_Colleges\_PA: PUB-SW-Institutional Partnership-Colleges-PA
- SCG\_SW\_IP\_Gov: PUB-SW-Institutional Partnership-Government
- SCG\_SW\_IP\_Gov\_PA: PUB-SW-Institutional Partnership-Government-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-New Construction-Nonresidential-Mixed Fuel
- SCG\_SW\_NC\_NonRes\_Ag\_mixed\_PA: AG-SW-New Construction-Nonresidential-Mixed Fuel-PA
- SCG\_SW\_NC\_NonRes\_Com\_mixed: COM-SW-New Construction-Nonresidential-Mixed Fuel
- SCG\_SW\_NC\_NonRes\_Com\_mixed\_PA: COM-SW-New Construction-Nonresidential-Mixed Fuel-PA
- SCG\_SW\_NC\_NonRes\_Ind\_mixed: IND-SW-New Construction-Nonresidential-Mixed Fuel
- SCG\_SW\_NC\_NonRes\_Ind\_mixed\_PA: IND-SW-New Construction-Nonresidential-Mixed Fuel-PA
- SCG\_SW\_NC\_NonRes\_Pub\_mixed: PUB-SW-New Construction-Nonresidential-Mixed Fuel
- SCG\_SW\_NC\_NonRes\_Pub\_mixed\_PA: PUB-SW-New Construction-Nonresidential-Mixed Fuel-PA
- SCG\_SW\_NC\_NonRes\_Res\_mixed: RES-SW-New Construction-Nonresidential-Mixed Fuel
- SCG\_SW\_NC\_NonRes\_Res\_mixed\_PA: RES-SW-New Construction-Nonresidential-Mixed Fuel-PA
- SCG\_SW\_NC\_Res\_Mixed: RES-SW-New Construction-Residential-Mixed Fuel
- SCG\_SW\_NC\_Res\_Mixed\_PA: RES-SW-New Construction-Residential-Mixed Fuel-PA
- SCG\_SW\_PLA: RES-SW-Plug Load and Appliances
- SCG\_SW\_PLA\_PA: RES-SW-Plug Load and Appliances-PA
- SCG\_SW\_WET\_CC: WET&O-SW-WE;&T; Career Connections
- SCG\_SW\_WET\_CC\_PA: WET&O-SW-WE;&T; Career Connections-PA
- SCG\_SW\_WET\_Work: WET&O-SW-WE;&T; Career and Workforce Readiness
- SCG\_SW\_WET\_Work\_PA: WET&O-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