

**DRA DATA REQUEST**  
**DRA-SCG-120-STA**  
**SOCALGAS 2012 GRC – A.10-12-006**  
**SOCALGAS RESPONSE**  
**DATE RECEIVED: JULY 15, 2011**  
**DATE RESPONDED: AUGUST 1, 2011**

**Exhibit Reference:** SCG-20

**Subject:** Pension and PBOP costs

**Please provide the following:**

This data request was mistakenly delayed in being sent out. DRA would appreciate if responses were sent as they are answered, rather than being collected.

1. Actuarial reports for the pension plan for 2010, and for 2011, if available. If not available, please provide an expected date when they will be available.
  - a. In the event 2011 reports are not immediately available, please provide an update to the 2010 reports using the actual year end plan balance.

**SoCalGas Response:**

Attached are copies of the 2010 SCG Pension Plan Actuarial Valuation Report. SoCalGas anticipates the final 2011 Cash Balance Plan Actuarial Valuation Report will be available around 3<sup>rd</sup> quarter 2011. Please note that 2011 recorded financial information will not be available until after SoCalGas' 10-K report is filed with the SEC in early 2012.



SCG 2010 Pension  
Report.FINAL.pdf

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2. Actuarial reports for the PBOP plan for 2010, and for 2011, if available. If not available, please provide an expected date when they will be available.
  - a. In the event 2011 reports are not immediately available, please provide an update to the 2010 reports using the actual year end plan balance.

**SoCalGas Response:**

Attached is a copy of the 2010 SDG&E Postretirement Health & Life Plan Actuarial Valuation Report. SoCalGas anticipates that the final 2011 SoCalGas Postretirement Health & Life Plan Actuarial Valuation Report will be available around 3<sup>rd</sup> quarter 2011. Please note that 2011 recorded financial information will not be available until after SoCalGas' 10-K report is filed with the SEC in early 2012.



Sempra-ValPostretire  
mentWelfarePlan-SCC

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3. Actual contributions to the pension fund for the past 20 years.

**SoCalGas Response:**

Summary of SoCalGas Pension Plan Contributions: 1991 - 2011

Plan Year	Contribution	Plan Year	Contribution	Plan Year	Contribution
1991	\$27.0M	1998	\$0.0M	2005	\$0.0M
1992	\$26.8M	1999*	\$0.0M	2006	\$0.0M
1993	\$27.0M	2000	\$0.0M	2007	\$0.0M
1994	\$26.9M	2001	\$0.0M	2008	\$0.0M
1995	\$26.9M	2002	\$0.0M	2009	\$71.7M
1996	\$24.7M	2003	\$1.3M	2010	\$66.8M
1997	\$0.0M	2004	\$0.0M	2011*	NA

\*Please note that 2011 recorded financial information will not be available until after SoCalGas' 10-K report is filed with the SEC in early 2012.

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4. Actual contributions to the PBOP fund for the past 20 years.

**SoCalGas Response:**

Summary of SoCalGas PBOP Plan Contributions: 1991 - 2011

Plan Year	Contribution	Plan Year	Contribution	Plan Year	Contribution
1991	Not Available	1998	\$30.0M	2005	\$36.3M
1992	Not Available	1999	\$24.0M	2006	\$18.6M
1993	\$43.9M	2000	\$9.8M	2007	\$28.0M
1994	\$39.6M	2001	\$12.9M	2008	\$22.6M
1995	\$40.3M	2002	\$17.6M	2009	\$27.3M
1996	\$39.2M	2003	\$45.0M	2010	\$34.1M
1997	\$33.4M	2004	\$41.9M	2011*	NA

\*Please note that 2011 recorded financial information will not be available until after SoCalGas' 10-K report is filed with the SEC in early 2012.

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5. Actual value of the pension fund at 1/1/2011.

**SoCalGas Response:**

The actual value of the SoCalGas pension fund at 1/1/2011 was \$1,456.5M.

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6. Actual value of the PBOP fund at 1/1/2011.

**SoCalGas Response:**

The actual value of the SoCalGas PBOP fund at 1/1/2011 was \$632.2M.

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7. Actual rates of return earned by the pension fund for the past 20 years.

**SoCalGas Response:**

SoCalGas Pension Plan: Rate of Return on Pension Fund 1991 - 2011

Plan Year	Rate of Return	Plan Year	Rate of Return	Plan Year	Rate of Return
1991	24.3%	1998	16.7%	2005	8.8%
1992	5.9%	1999	29.7%	2006	14.9%
1993	14.3%	2000	(7.3%)	2007	9.1%
1994	0.6%	2001	(9.6%)	2008	(26.3%)
1995	26.4%	2002	(11.0%)	2009	22.4%
1996	14.0%	2003	24.5%	2010	13.6%
1997	16.9%	2004	13.0%	2011*	NA

\*Please note that 2011 recorded financial information will not be available until after SoCalGas' 10-K report is filed with the SEC in early 2012.

SoCalGas Pension Plan: Cumulative Return on Pension Fund 1991 - 2011

	1-Year	3-Years	5-Years	10-Years	20-Years
Rate of Return	22.5%	4.9%	5.4%	5.7%	8.8%

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8. Actual rates of return earned by the PBOP fund for the past 20 years.

**SoCalGas Response:**

SoCalGas PBOP Plan: Rate of Return on PBOP Fund 1991 - 2011

Plan Year	Rate of Return	Plan Year	Rate of Return	Plan Year	Rate of Return
1991	Not Available	1998	Not Available	2005	6.7%
1992	Not Available	1999	Not Available	2006	13.6%
1993	Not Available	2000	(5.0%)	2007	7.0%
1994	Not Available	2001	(7.8%)	2008	(26.6%)
1995	Not Available	2002	(11.0%)	2009	21.2%
1996	Not Available	2003	22.1%	2010	12.6%
1997	Not Available	2004	11.1%	2011	Not Available