

Table 1. Commission Adopted and Proposed Energy Savings Goals

2013-15 Electric Goals	Program Administrator/Utility			
	2010-12 Annualized ¹	2013 ²	2014 ²	2015 ³
Annual electricity savings (GWh/yr)				
IOU program targets				
Codes and Standards Advocacy				
Total Annual Targets				
Annual peak savings (MW)				
IOU program targets				
Codes and Standards Advocacy				
Total Peak Savings Targets				
Annual natural gas savings with interactive effects (MMTh/yr)				
IOU program targets	30.2	24.0	22.3	21.3
Codes and Standards Advocacy		0.1	0.9	4.0
Total Gas Targets	30.2	24.1	23.2	25.3

[1] 2010-12 Annualized is the sum of the adopted CPUC goals in D.09-09-047 for the three years divided by three including Codes and Standards.

[2] 2013 and 2014 are IOU savings targets approved in Table 5 of D.12-11-015.

[3] 2015 Goals are approved in Figure 1 of D.14-10-046.

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Table 2. Total 2015 Requested and 2010-2014 Authorized Budgets (\$000).

Category (2010-14 Authorized¹ and 2015 Request)	Electric Demand Response Funds	Electric Energy Efficiency Funds	Natural Gas Public Purpose Funds	Total Energy Efficiency Funds
2010-12 Annualized Programs	\$ -	\$ -	\$ 91,200	\$ 91,200
2010-12 Annualized EM&V	\$ -	\$ -	\$ 3,800	\$ 3,800
2010-2012 Annualized Total	\$ -	\$ -	\$ 95,000	\$ 95,000
2013-2014 Annualized Program Funds - Utility	\$ -	\$ -	\$ 83,191	\$ 83,191
2013-2014 Annualized Program Funds - REN	\$ -	\$ -	\$ 4,526	\$ 4,526
2013-2014 Annualized Program Funds - CCA	\$ -	\$ -	\$ -	\$ -
2013-2014 Annualized EM&V	\$ -	\$ -	\$ 3,651	\$ 3,651
2013-2014 Total Annualized Portfolio	\$ -	\$ -	\$ 91,368	\$ 91,368
2015 Program Funds - Utility	\$ -	\$ -	\$ 76,019	\$ 76,019
2015 Program Funds - REN	\$ -	\$ -	\$ 4,337	\$ 4,337
2015 Program Funds - CCA	\$ -	\$ -	\$ -	\$ -
2015 EM&V	\$ -	\$ -	\$ 3,214	\$ 3,214
2015 Total Portfolio Request	\$ -	\$ -	\$ 83,570	\$ 83,570

[1] Authorized budget excludes reductions from past unspent funds, carryover, and is consistent with funding approved in D.09-09-047, D.12-11-015, and D.14-10-046.

Table 3. Past and Requested Energy Efficiency Budgets

Annualized Budget by Program Area (\$000) ¹	2010-2012 Authorized ¹ Annualized	2010-2012 Authorized Spent ¹ Annualized	Carryover Spent ³ in 2010- 2012 Annualized	2013-2014 Authorized ¹ Annualized	2013 Authorized Spent ²	Carryover Spent ³ in 2013	2015 Request
Statewide Resource Programs							
Residential	\$ 22,888	\$ 18,092	\$ -	\$ 19,566	\$ 13,009	\$ 1,303	\$ 19,579
Commercial	\$ 10,904	\$ 8,621	\$ -	\$ 9,138	\$ 5,431	\$ 1,015	\$ 10,737
Industrial	\$ 22,927	\$ 11,018	\$ -	\$ 14,602	\$ 8,137	\$ 3,052	\$ 11,173
Agricultural	\$ 3,652	\$ 1,262	\$ -	\$ 2,377	\$ 1,115	\$ (10)	\$ 4,239
Codes and Standards	\$ 601	\$ 508	\$ -	\$ 837	\$ 237	\$ 66	\$ 843
Financing	\$ 864	\$ 811	\$ -	\$ 7,598	\$ 953	\$ (721)	\$ 2,264
Subtotal Statewide Resource Programs	\$ 61,834	\$ 40,312	\$ -	\$ 54,117	\$ 28,882	\$ 4,704	\$ 48,835
Other Resource Programs							
Third Party Programs (competitively bid)	\$ 12,970	\$ 10,689	\$ -	\$ 14,116	\$ 11,387	\$ 565	\$ 13,629
Local Government Partnerships	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Subtotal Other Resource Programs	\$ 12,970	\$ 10,689	\$ -	\$ 14,116	\$ 11,387	\$ 565	\$ 13,629
Statewide Non-Resource Programs							
Third Party Programs (competitively bid)	\$ 6,072	\$ 5,486	\$ -	\$ 2,783	\$ 2,677	\$ 56	\$ 2,747
Local Government Partnerships	\$ 3,188	\$ 1,779	\$ -	\$ 4,763	\$ 2,133	\$ 32	\$ 4,846
Emerging Technologies	\$ 1,172	\$ 989	\$ -	\$ 1,258	\$ 1,329	\$ 359	\$ 1,272
Workforce, Education, and Training	\$ 3,650	\$ 2,706	\$ -	\$ 3,077	\$ 2,761	\$ 4	\$ 3,129
Integrated Demand Side Management	\$ 200	\$ 224	\$ -	\$ 325	\$ 228	\$ (0)	\$ 582
Other - CRM			\$ -	\$ 749	\$ 1,446	\$ -	\$ 978
Subtotal Statewide Non-Resource Programs	\$ 14,282	\$ 11,183	\$ -	\$ 12,955	\$ 10,574	\$ 450	\$ 13,554
Subtotal Utility Programs	\$ 89,086	\$ 62,184	\$ -	\$ 81,189	\$ 50,842	\$ 5,719	\$ 76,019
Non-Utility Programs							
Other - SoCalREN ⁴			\$ -	\$ 4,526	\$ 1,245	\$ -	\$ 4,337
Subtotal Non-Utility Programs	\$ -	\$ -	\$ -	\$ 4,526	\$ 1,245	\$ -	\$ 4,337
TOTAL NEW BUDGET REQUEST	\$ 89,086	\$ 62,184	\$ -	\$ 85,715	\$ 52,087	\$ 5,719	\$ 80,356
Evaluation, Measurement, and Verification	\$ 3,800	\$ 1,863	\$ -	\$ 3,651	\$ 407	\$ 1,329	\$ 3,214
TOTAL ALL PROGRAMS w/o ME&O	\$ 92,886	\$ 64,048	\$ -	\$ 89,366	\$ 52,494	\$ 7,049	\$ 83,570
SW Marketing, Education, and Outreach ⁵	\$ 2,114	\$ 654	\$ -	\$ 2,002	\$ 273	\$ 242	\$ -
GRAND TOTAL PORTFOLIO	\$ 95,000	\$ 64,702	\$ -	\$ 91,368	\$ 52,768	\$ 7,290	\$ 83,570

[1] Authorized means the total authorized budget for the program cycle for programs irrespective of the source of funds as either from past unspent or new collections. Spent means actual funds expensed, including accruals, for activities completed during the period.

[2] 2013 spent means funds expensed for program activities occurring through 12/31/13.

[3] Carryover spent means actual funds expensed from funds of a previous cycle carried over as committed/obligated.

[4] SoCalREN 2013 spend based on SoCalGas paid invoices.

[5] These budgets are as established in D.13-04-021 and D.13-12-038 covering the 2013-2015 period; no new budget requested in this filing.

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Table 4a. Unspent Energy Efficiency Program Funding

Previous Unspent Offset to 2015 Revenue Requirements (\$000)	Electric Former PGC Funds	Electric Procurement Funds	Natural Gas Public Purpose Funds	Total
Category				
1998-2009 EM&V Funds	\$ -	\$ -	\$ -	\$ -
1998-2009 Program Funds	\$ -	\$ -	\$ -	\$ -
2010-2012 EM&V Funds	\$ -	\$ -	\$ -	\$ -
2010-2012 Program Funds - Utility	\$ -	\$ -	\$ 1,800	\$ 1,800
2012 Program Funds - CCA	\$ -	\$ -	\$ -	\$ -
2013-2014 EM&V Funds	\$ -	\$ -	\$ -	\$ -
2013-2014 Program Funds - Utility	\$ -	\$ -	\$ -	\$ -
2013-2014 Program Funds - REN	\$ -	\$ -	\$ -	\$ -
2013-2014 Program Funds - CCA	\$ -	\$ -	\$ -	\$ -
Total	\$ -	\$ -	\$ 1,800	\$ 1,800

Table 4b. Carryover Energy Efficiency Program Funding Not Yet Spent

Previous carryover funds not yet spent (\$000).	Electric Former PGC Funds	Electric Procurement Funds	Natural Gas Public Purpose Funds	Total
Category				
1998-2009 EM&V Funds	\$ -	\$ -	\$ -	\$ -
1998-2009 Program Funds	\$ -	\$ -	\$ -	\$ -
2010-2012 EM&V Funds	\$ -	\$ -	\$ 5,300	\$ 5,300
2010-2012 Program Funds - Utility	\$ -	\$ -	\$ 18,400	\$ 18,400
2012 Program Funds - CCA	\$ -	\$ -	\$ -	\$ -
2013-2014 EM&V Funds	\$ -	\$ -	\$ 3,244	\$ 3,244
2013-2014 Program Funds - Utility ¹	\$ -	\$ -	\$ 32,075	\$ 32,075
2013-2014 Program Funds - REN ²	\$ -	\$ -	\$ -	\$ -
2013-2014 Program Funds - CCA	\$ -	\$ -	\$ -	\$ -
Total	\$ -	\$ -	\$ 59,019	\$ 59,019

[1] 2013-2014 Funds represent 2013 committed and unspent funds to be spent in 2014 or 2015.

[2] Refer to 2015 SoCalREN Compliance Filing for the SoCalREN information.

[3] Table 4a are 4b are consistent with 2015 budget filing of March 26, 2014.

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Table 5. 2013 Authorized and Spent/Unspent Detail

Authorized, spent and unspent program funds (\$000)	Electric Procurement Funds	Natural Gas Public Purpose Funds	Total
Category			
2013-14 Annualized Authorized Program Budget	\$ -	\$ 86,842	\$ 86,842
2013 Actual Spent ¹	\$ -	\$ 51,523	\$ 51,523
2013 Unspent	\$ -	\$ 35,319	\$ 35,319
2013 Committed and/or encumbered funds ^{2,3}	\$ -	\$ 13,706	\$ 13,706
2013 Unspent - planned for use in 2014	\$ -	\$ 21,613	\$ 21,613
2013 Unspent - estimated available for 2015 ⁴	\$ -	\$ -	\$ -

[1] Actual spent means funds expensed, including accruals, for program activities occurring from 1/1/13 through 12/31/13.

[2] 2013 committed and/or encumbered funds means funds that are associated with individual customer projects and/or contained within contracts or purchase order for authorized activities after 12/31/2013.

[3] Value shown does not reflect all SoCal Gas commitments; among those are SW ME&O, New Financing Pilots, and joint projects with other utilities.

[4] Does not include spending/unspent funds associated with SoCal REN.

[5] 2013 unspent - available for 2015 are total unspent uncommitted funds and not planned for use in 2014.

[6] Table 5 is consistent with 2015 budget filing of March 26, 2014.

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Table 6.1 Estimated and Claimed Savings 2010-2015.

Category	Compliance Filing Forecast ¹			Claimed		
	GWh	MW	MM Therm	GWh	MW	MM Therm
2010-12 Annualized	18.0	11.3	38.4	7.1	9.1	32.5
2013	6.8	3.7	29.6	8.2	5.8	25.4
2014	6.8	3.7	29.9			
2015	6.3	3.6	30.5			

[1] Compliance Filing Forecast based on CPUC approved compliance filing savings estimates. C&S and Energy Savings Assistance program savings are included in all years.

[2] 2013 Claimed savings updated with actual results.

Table 6.2 CPUC Authorized Goals for 2010-2015.

Category	CPUC Goals ¹		
	GWh	MW	MM Therm
2010-12 Annualized			30.2
2013			24.1
2014			23.2
2015			25.3

[1] Goals are taken from D.09-09-047 for 2010-2012, D.12-11-015 for 2013-2014, and D.14-10-046 for 2015. C&S and Energy Savings Assistance program savings are included in all years.

Table 6.3 Comparison of Forecast and Claimed Savings to CPUC Authorized Goals

Category	Compliance Filing Forecast Compared to Goals			Claimed Savings Compared to Goals		
	GWh % of Goal	MW % of Goal	MM Therm % of Goal	GWh % of Goal	MW % of Goal	MM Therm % of Goal
2010-12 Annualized			127%			108%
2013			123%			106%
2014			129%			N/A
2015			121%			N/A

Table 7.1 TRC Cost-Effectiveness Scenario Results^{1,2,3,4,5,6}

	2010-2012 Claimed	2013 Claimed ¹⁰	2013-2014 Forecast ⁷	2015 Forecast
Resource Portfolio (less C&S and less M E)		1.36	1.56	1.65
Resource and Nonresource Portfolios (less C&S and less M E)		1.18	1.17	1.27
Portfolio with C&S, M E (2013-15 only) and ESPI⁸	1.25	1.17	1.16	1.30
Portfolio with CS, M E (2013-2015 only), ESPI, and REN^{8,9}	1.25	1.16	1.16	1.27

[1] Includes costs and savings associated with electric efficiency interactive effects.

[2] Does not include Emerging Technology Program or OBF revolving loan pool costs.

[3] Does not include Energy Savings Assistance program costs and benefits.

[4] 2015 forecast includes \$6,421,800 in overhead costs authorized in SoCalGas' General Rate Case.

[5] 2015 forecast does not include costs or benefits associated with SW Marketing & Outreach and New Financing Pilots; these are captured in the 2013-2014 forecast.

[6] ME is Market Effects. Only applies to 2013-2015 pursuant to D.12-11-015 that adopted 5% spillover for resource programs.

[7] 2013-2014 forecast taken from SoCalGas 2013-2014 Compliance Filing filed on January 14, 2013.

[8] 2015 forecast includes estimated Energy Savings Performance Incentive payments of \$6,464,818.

[9] Includes costs but not benefits associated with the SoCalREN.

[10] Cost-Effectiveness for 2013 Claimed results has been updated with actual results.

Table 7.2 PAC Cost-Effectiveness Scenario Results^{1,2,3,4,5,6}

	2010-2012 Claimed	2013 Claimed ¹⁰	2013-2014 Forecast ⁷	2015 Forecast
Resource Portfolio (less C&S and less M E)		2.09	2.18	2.46
Resource and Nonresource Portfolios (less C&S and less M E)		1.68	1.48	1.70
Portfolio with C&S, M E (2013-15 only) and ESPI⁸	2.48	1.98	1.73	2.05
Portfolio with CS, M E (2013-2015 only), ESPI, and REN^{8,9}	2.48	1.95	1.73	1.97

[1] Includes costs and savings associated with electric efficiency interactive effects.

[2] Does not include Emerging Technology Program or OBF revolving loan pool costs.

[3] Does not include Energy Savings Assistance program costs and benefits.

[4] 2015 forecast includes \$6,421,800 in overhead costs authorized in SoCalGas' General Rate Case.

[5] 2015 forecast does not include costs or benefits associated with SW Marketing & Outreach and New Financing Pilots; these are captured in the 2013-2014 forecast.

[6] ME is Market Effects. Only applies to 2013-2015 pursuant to D.12-11-015 that adopted 5% spillover for resource programs.

[7] 2013-2014 forecast taken from SoCalGas 2013-2014 Compliance Filing filed on January 14, 2013.

[8] 2015 forecast includes estimated Energy Savings Performance Incentive payments of \$6,464,818.

[9] Includes costs but not benefits associated with the SoCalREN.