

**BEFORE THE PUBLIC UTILITIES COMMISSION  
OF THE STATE OF CALIFORNIA**

Order Instituting Rulemaking Concerning  
Energy Efficiency Rolling Portfolios, Policies,  
Programs, Evaluation, and Related Issues.

Rulemaking 13-11-005  
(Filed November 14, 2013)

**SOUTHERN CALIFORNIA GAS COMPANY (U 904 G) ENERGY EFFICIENCY  
PROGRAMS 2023 AMENDED ANNUAL REPORT**

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January 10, 2025

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PROGRAMS 2023 AMENDED ANNUAL REPORT**

Southern California Gas Company (SoCalGas) hereby submits the following amendment to its Energy Efficiency Annual Report (Annual Report) for its Energy Efficiency (EE) programs and results for Program Year (PY) 2023. The Annual Report is prepared in accordance with the Administrative Law Judge’s Ruling Adopting Annual Reporting Requirements for Energy Efficiency and Addressing Related Reporting Issues (August 8, 2007),<sup>1</sup> and Decision (D.) 18-01-001 and 18-05-041. The Ruling requires “each utility to file its annual report on May 1 of the year following the end of a given program year.”<sup>2</sup>

The Annual Report Amendment includes the following minor revisions, as noted below and highlighted within the narrative and associated tables. The amended report is attached and will be uploaded and available on SoCalGas’s website at <https://www.socalgas.com/regulatory/efficiency> and on California Energy Data and Reporting System (CEDARS).

- Fund shift from ISTAR to Statewide Midstream Water Heating program to accommodate program success and related expenditures.

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<sup>1</sup> Per the Ruling, issued in Rulemaking 06-04-010, filing and serving the Annual Report would apply to successor proceedings, which includes this docket. See Ruling at 4, OP 2.

<sup>2</sup> *Id.* The attached Annual Report amends the version which was served on May 1, 2024.

- Amended: Excel Table 4 - Program Data, Table 5 - Segment Summary, Table 10 - Cap & Target
- Summer Reliability Program 2023 saving claim
  - Amended: Excel Table 4 totals, table footnote and Narrative Executive Summary
- Final reconciliation of Statewide True Up completed and documented on
  - Amended: Narrative Appendix E
- EE Kits Program - removal of program closure language in narrative.
  - Amended: Program Narrative
- Therms for Agriculture Program - ~111k therms not claimed due to system error
  - Amended: Footnotes Table 4 Program Data & Narrative Executive Summary
- Removal of Appendix G – changes to 2022 Annual Report for Industrial SEM Program

Respectfully submitted,

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January 10, 2025

**ATTACHMENT**

Southern California Gas  
Company Energy  
Efficiency Programs  
Amended Annual Report  
2023 Results



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## Executive Summary

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At Southern California Gas Company (SoCalGas), sustainability and environmental stewardship are integral aspects of delivering energy efficiency program offerings and services. SoCalGas is committed to assisting customers in their efforts with conservation, energy efficiency, and clean energy technologies while reducing the environmental footprint of their operations. Through its continuing range of tailored energy efficiency programs, strategies, and solutions, SoCalGas strives to address the evolving energy needs of our customers.

In 2023, SoCalGas built upon previous successes and best practices in program delivery to proactively identify energy efficiency opportunities and cater to our diverse customer base. Initiatives aligned with the 2018-2025 Energy Efficiency Business Plan detailed in California Public Utilities Commission (Commission, or CPUC) Decision (D.) 18-05-041 and the ongoing energy efficiency third-party solicitation process approved in D.18-01-004 to (1) facilitate, sustain, and transform the long-term delivery and adoption of energy-efficient products and services, (2) cultivate, promote, and sustain lasting energy-efficient operations and practices; and (3) meet customers' energy efficiency adoption preferences through a range of simplified offerings that address customer needs. Notably, 2023 program implementation yielded significant results, with customers saving over **47.4<sup>3</sup> million net therms** – surpassing the energy efficiency target set by the Commission in D.22-05-016.<sup>4</sup> This equates to over \$88 million in resource benefits for ratepayers, while also averting more than 250,000 metric tons of carbon dioxide (CO<sub>2</sub>) emissions.

Collaboration with the CPUC and other stakeholders remains paramount as we collectively strive towards California's energy efficiency objectives. SoCalGas efforts are aligned with the California Long-Term Energy Efficiency Strategic Plan and Energy Action Plan (CLTEESP), as well as Senate Bill (SB) 350, aiming to double energy efficiency by 2030.

Embracing the goals outlined in the Energy Efficiency Business Plan, SoCalGas is dedicated to fostering lasting adoption of energy-efficient practices and meeting customers' preferences through streamlined offerings. Furthermore, partnerships with municipal electric utilities and water agencies extend SoCalGas's reach, enhance cost-effectiveness, and enable SoCalGas to deliver comprehensive demand-side management solutions, furthering commitment to sustainable energy practices.

## Notable successes during program year 2023

### ENERGY STAR Partner of the Year

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<sup>3</sup> Includes savings achieved in the 2023 Summer Reliability Program and additional 111K therms not included in filed report due to a system error that partially counted savings from limited number of projects within the Agricultural Energy Efficiency Program.

<sup>4</sup> D.22-05-016, at 6.



In April 2024, SoCalGas received the prestigious U.S. Environmental Protection Agency (EPA) 2024 ENERGY STAR Partner of the Year award, acknowledging for the second consecutive year its steadfast leadership in advancing energy efficiency. This award was a result of SoCalGas's energy efficiency program efforts and activities during 2023 and underscores SoCalGas's commitment to integrating ENERGY STAR into programs, catalyzing the adoption of energy-efficient products across residential, commercial, and industrial sectors. The award recognizes SoCalGas's exemplary energy efficiency initiatives including the successful implementation of the residential rebate program. This initiative offers rebates for ENERGY STAR smart thermostats, natural gas dryers, and tankless water heaters, fostering widespread adoption of energy-saving technologies. Notably, SoCalGas also received this award in 2023, representing a back-to-back recognition by the EPA for successful energy efficiency program delivery.

SoCalGas's energy efficiency programs rank among the largest nationwide, driving substantial energy savings and mitigating environmental impact. Over the past five years, these initiatives have yielded significant outcomes, delivering nearly 236.5 million therms in energy savings – equivalent to the natural gas consumption of over 162,999 households annually and saving customers over \$349 million. Concurrently, efforts have resulted in a reduction of greenhouse gas emissions (GHGs) by over 1,249,898 metric tons, equal to removing nearly 297,478 cars from the road each year.

### **Residential Programs**

The SoCalGas Residential Energy Advisor provides surveys to residential customers. These surveys serve as educational tools about energy consumption patterns and present opportunities for energy and cost savings. Throughout 2023, thousands of SoCalGas customers actively engaged with the online platform, utilizing it as a resource to manage their energy usage. Notably, more than 33,600 online Energy Advisor Surveys were completed during the year.

The Energy Advisor Surveys remain instrumental in providing customers with valuable insights into their energy usage habits. In 2023, more than 405,000 customers interacted with the Analyze Usage feature within the UAT, more than 22,000 Savings Plans were generated, and 42,600 customers engaged with the Tip, Programs and Rebates pages. Additionally, there was a substantial increase in customer engagement with the Compare Bills tool, with usage surging 230% over 2022. These statistics underscore the efficacy of SoCalGas's efforts in delivering comprehensive energy efficiency education to our residential customers.

The Residential Behavioral Program continues to achieve considerable success, engaging with over 1.7 million residential customers from November 2022 through March 2023 (PY 2023). PY 2023 methodology included 16 treatment cohorts. Participants in these cohorts received Home Energy Reports from one of two implementers. Throughout the year, nearly 11.4 million therms were saved, representing a substantial 14% savings increase over 2022. During the winter months, up to four paper Home Energy Reports (HERs) were distributed, complemented by twelve email reports throughout the year. The Behavioral Program also served as cross-promotional tool to expose customers to other programs and services.

The sustained effectiveness of the Residential Behavioral Program is evident in its significant contribution to SoCalGas's energy efficiency portfolio. By leveraging behavioral insights and

targeted outreach strategies, the program continues to empower residential customers to make informed decisions about their energy usage, resulting in significant natural gas savings.

LivingWise is a school-based program that engages and educates sixth-grade students in energy efficiency activities by enrolling teachers and administrators through recruitment efforts that include an emphasis on Title 1 schools.

The program empowers students to learn how to protect natural resources and reduce energy usage at home by supplying energy efficiency materials to the teachers for distribution in the classrooms. This no-cost program is designed to generate immediate and long-term resource savings by bringing interactive, real-world education home to students and their families. In 2023, the SoCalGas LivingWise Program served more than 50,000 students in the Southern California Gas Service territory, an increase of approximately 52% in program participation since 2022.

### **Commercial Programs**

The SoCalGas Small Business Savings Program, an EE initiative catering to commercial customers in Southern California, targets small and medium-sized businesses across San Bernardino and Riverside counties. Emphasizing sectors such as restaurants, lodging, retail, and offices, the program provides deemed rebates and direct installation services. In early Q1 2023, the program team designed a targeted approach that maximized savings opportunities by identifying specific building types with high natural gas usage and promoting a handful of specific, deep energy-savings measures. As a result, the program saw unprecedented success, and reached its contractual energy-savings performance goal by March 2023.

A key focus of the program has been on foodservice installations and enrolling customers identified as disadvantaged or hard-to-reach (HTR). To better engage such customers, the program altered its approach, providing equipment at minimal cost or no cost to customers, thereby reducing the customer copay. This change in delivery mechanism significantly contributed to the program's success.

In 2023, the Instant Rebates Program delivered a record performance in energy savings achieved and in units rebated. Additionally, the program exceeded its Disadvantaged Business Enterprise (DBE) spending commitment and provided Instant Rebates to over 2,500 HTR and Disadvantaged Communities (DAC) customers. The implementer also enrolled over 25 new participants, which helped expand the geographical coverage and customer reach across the state, sales channels, and customer segments. Over 175 participant locations have been enrolled in the program. A significant portion of therm savings reported in 2023 originated from DACs, demonstrating the program's commitment to equitable distribution.

The Restaurant Behavioral Test Project was offered for the first time to high usage chain restaurant customers, allowing them to view energy usage information. The project's objective was to enable restaurant managers to have a better understanding of energy consumption and help identify opportunities to save energy. Two chains participated in the test project with almost 30 locations combined. Utilizing information such as restaurant location size, hours of operations, traffic or volume of entree served, average hourly consumption, and weather data,

usage consumption information were analyzed. Visualization of each location's monthly analysis was made available to authorized participants via an on-line dashboard tool. The dashboard contained customized energy savings recommendations which were not limited to energy efficiency tips but also included equipment replacement opportunities. Participants expressed satisfaction with the site and SoCalGas's energy savings efforts. This led to participants' kitchen process modification and energy savings upgrades.

## **Industrial Sector**

The Industrial Strategic Energy Management (SEM) Program represents a comprehensive approach aimed at identifying and implementing energy reduction measures within large-scale industrial facilities. By addressing opportunities spanning low-cost behavioral adjustments, operational enhancements, and retro-commissioning (RCx) measures, the program assists facilities in achieving significant energy savings. Notably, in 2023, the program included 17 of SoCalGas's largest industrial customers across 4 cohorts and the program completed the first-of-its-kind gas-only cohort. The program's success continues to garner interest from major customer portfolios interested in learning about equipment optimization through the unique cohort structure that SEM offers. Moreover, the program's alignment with the Aspire 2045 sustainability strategy underlines SoCalGas's commitment to achieving net-zero greenhouse gas emissions in its operations and energy delivery by 2045.

## **Financing Programs**

The On-Bill Financing (OBF) Program, a cornerstone of the SoCalGas finance offerings, facilitates interest-free, unsecured loans repayable through utility bills. Designed to complement the SoCalGas energy efficiency rebate programs, OBF enables non-residential and multifamily customers to implement energy-saving measures even if they lack the upfront capital. By providing access to funding, OBF empowers businesses to make sustainable investments that yield long-term energy cost reductions.

In 2023, the OBF program engaged in extensive collaboration with internal and external partners to raise awareness of its benefits among the SoCalGas customer base. Through seminars, webinars, and various educational outreach efforts, the program successfully distributed information about its offerings throughout the service territory. As a result, 15 OBF loan projects, totaling \$500,000, were initiated, which represented a greater than 50% increase over 2022 participation.

Moreover, the program received CPUC approval to expand OBF measure offerings to include clean energy technologies, paving the way for more comprehensive projects in future years.

Moving forward, SoCalGas remains resolute in the mission to spearhead energy efficiency program offerings, leveraging innovative strategies and partnerships to drive sustainable outcomes for both SoCalGas and the communities we serve.

## Statewide Programs

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Under the context of the energy efficiency rolling portfolio overseen by the IOUs, D.18-01-004<sup>5</sup> approved the solicitation process for procurement of energy efficiency programs for the next several years and beyond. The decision requires the utilities to have at least 60 percent of their energy efficiency portfolio budgets designed and implemented by third-party implementers by the end of 2022.

SoCalGas is the program administrator for three statewide programs, including the Statewide Food Service Point of Sale (SW FS POS), the Statewide Mid-Stream Water Heating (SW MS WH), and the Statewide Gas Emerging Technologies (SW GET) sectors. **Amendment E includes a SW True Up as filed on May 1, 2024, as well as amended values post-reconciliation.**

The program for SW FS POS is called the California Food Service Instant Rebates Program. The program works with midstream market actors to offer POS rebates to CA IOU end use customers. All customers with a commercial rate structure served by one of the four IOUs are eligible for POS rebates. Foodservice equipment dealers, manufacturers, contractors, and distributors who make sales directly to end use customers are eligible to enroll in the Program.

The SW MS WH Program is a distributor-centric model design, which collaborates with a network of distributors that specialize in the sale of efficient electric and natural gas measures. Point-of-sale discounts and incentives are paid at the midstream level to distributors based on transactions and sales to contractors.

SoCalGas's GET Program is designed to rapidly identify, prioritize, screen and advance promising energy-efficient gas technologies into the EE program portfolio and support their increased adoption by customers. GET is based on a collaborative effort with targeted markets and technology actors to provide program implementers and administrators with eligible technologies for program inclusion, information on barriers to their adoption and, where applicable, potential strategies to overcome such barriers.

Advice Letter for SW MS WH and SW FS POS programs were filed with the Commission on December 4, 2020, and December 15, 2020, respectively. The SW FS POS Advice Letter was approved January 14, 2021. The SW MS WH Advice Letter was approved on March 18, 2021. The Advice Letter for SW GET program was filed with the Commission on July 23, 2021, and approved on August 24, 2021.

SoCalGas also provides funding to the Lead Program Administrators of other statewide programs as shown in Tables 3 and 4 of D.18-05-041. SoCalGas receives energy savings proportional to its contributions to the other statewide programs through the CPUC's CEDARS reporting system. Please refer to the other Lead Program Administrators' 2023 Energy Efficiency Annual Report for the performance for the other statewide programs.

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<sup>5</sup> D.18-01-004 at 61.

## Residential Energy Efficiency Programs

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The Residential energy efficiency sector programs offer and promote both specific and comprehensive energy solutions for residential customers. By encouraging adoption of economically viable energy efficiency technologies, practices, and services, these programs employ strategies and tactics to overcome market barriers while delivering services that support the CPUC's Strategic Plan and the Energy Efficiency Business Plan.

SoCalGas's Residential Energy Efficiency Programs focuses are to:

- Facilitate, sustain, and transform the long-term delivery and adoption of energy-efficient products and services for single and multi-family dwellings;
- Cultivate, promote, and sustain lasting energy-efficient behaviors by residential customers through a collaborative statewide education and outreach mechanism; and
- Meet customers' energy efficiency adoption preferences through a range of offerings including single-measure incentives and more comprehensive approaches.

Residential Energy Efficiency Programs include a number of statewide subprogram elements that together comprise the core product and service offerings. These subprograms and efforts include Midstream Plug Load & Appliance, Residential Upstream Heating Ventilation and Air Conditioning (HVAC), and Residential New Construction, among others.

### SCG3701 Residential – Energy Advisor

#### Program Overview

The Residential Energy Advisor Program is offered as a suite of energy and money-saving tools for residential customers within SoCalGas territory. Included in the offering are personalized recommendations based on an online survey typically completed by the account holder. The results of the survey provide customers with tips, recommendations, and links to available rebates and program services. SoCalGas's Energy Advisor Surveys were delivered to customers through the Universal Audit Tool (UAT).

#### Program Strategies & Outcomes

In 2023, 33,600 customers completed the energy profile and managed their energy use via the online platform representing a 60% increase over 2022.

SoCalGas utilized several methods to market the Energy Advisor tools including:

- Bill inserts;
- Email marketing;
- Customer outreach at events;
- Cross-promotional opportunities with income qualified programs; and
- Home Energy Report marketing modules both in print and web versions.

Marketing and outreach efforts resulted in more than 405,000 customers interacting with the Analyze Usage function within the UAT, a significant increase over 2022. Highlights include:

- Customers who viewed the Compare Bills tool increased over 230%.
- More than 22,000 Savings Plans generated in 2023 compared to 2022 where there was 7,800.
- 42,600 customers engaged in the Tips, Programs and Rebates compared to approximately 19,300 in 2022.
- Bill Tracker Alerts subscription increased by 30%, reaching more than 1.2 million customers.

Customer satisfaction with the Energy Advisor Program remains high as enhancements are made to improve audit completion rates.

## **SCG3702 Residential – Residential Energy Efficiency Program (REEP)**

### **Program Overview**

The Residential Energy Efficiency Program (REEP) is a deemed downstream gas measure rebate program that offers incentives to single and multifamily customers, as well as to new construction residential projects, encouraging the installation of the most efficient gas appliances available. REEP incorporates the best downstream practices to its three subprograms: the Home Energy Efficiency Rebate Program (HEER), the Multifamily Energy Efficiency Rebate Program (MFEER) and new construction appliance rebates provided through the Energy Efficiency New Homes Program (EENH).

MFEER offers cash rebates for the installation of qualified energy efficiency products in occupied apartment dwelling units and in the common areas of apartment complexes, condominiums, and mobile home parks.

### **Program Strategies & Outcomes - Multifamily**

The program succeeded in securing notable multifamily customer participation in 2023, particularly in Central Domestic Hot Water rebates (including demand control loop temperature controllers). The success of the program in 2023 was based on several strategies:

- Dedicated web pages on SoCalGas.com for customer education and participation;
- Single Points of Contact to guide customers through a step-by-step process to participate and benefit from SoCalGas programs; and
- SoCalGas maintaining and establishing new relationships with external partners including manufacturers and contractors to serve as “ambassadors” for the rebate program.

The latter facilitated a multifamily customer’s participation in MFEER and helped promote year-end rebates. MFEER made a significant contribution to REEP in 2023 by providing rebates for

more than 430 domestic temperature loop controllers, and more than 300 central domestic water heaters.

In 2023, SoCalGas's extension of the MF Vending Machine Clothes Washer Rebate partnerships with the Metropolitan Water District and the Los Angeles Department of Water and Power made it possible to continue offering higher incentives to qualifying customers. These partnerships enable ongoing collaboration on innovative ways to boost participation.

### **Program Strategies & Outcomes – Home Energy Efficiency Rebates**

HEER was successful in 2023 primarily due to participating retail partners personnel training of the SoCalGas mobile application. Additionally, SoCalGas was able to maintain visibility in HTR retail stores through in-store marketing communications and approximately 4,000 in-store visits. The field visits provided a chance to discuss upcoming changes to the rebate programs such as incentive levels due to workpaper updates and future Energy Star efficiency ratings.

During Q3, the program hosted a webinar on Solar Thermal Water Heating and collaborated with its partners to offer detailed information to contractors and to elicit feedback on industry challenges. Additionally, bilingual program applications were developed to cater to customers who were previously underserved resulting in an increase in participation. In Q4, the program successfully introduced two new measures: natural gas wall ovens and natural gas patio heaters. These offerings aim to promote awareness among customers about energy efficient options and to facilitate the adoption of new, efficient technologies.

### **Program Strategies & Outcomes – Energy Efficient New Homes**

EENH provides energy efficiency rebates to builders of eligible new construction projects that are built to exceed compliance of the State of California Title 24 Energy Efficiency Standards and equipped with energy efficient qualifying natural gas equipment. Participation is open to production and custom single-family homes as well as low-rise and high-rise multi-family projects built in the SoCalGas service territory and served by SoCalGas.

The EENH continued to be a success in 2023. To expand outreach, the residential new construction single-point contact team participated in meetings with builders and industry stakeholders at over 30 builder industry events and 45 builder meetings. This outreach to current builder participants supports new project enrollments in addition to engaging first time program participants to further expand the list of participating builders.

In 2023, more than 75 builder projects totaling over 5 thousand units were enrolled into the EENH Program. These units will be built with above code energy-efficient technologies that will ultimately lower energy costs for customers. In 2023 the EENH program added the Heat Recovery Ventilator as a new measure offering to its list of qualifying equipment. The success of the EENH program contributed to SoCalGas receiving the BIASC Century Award in recognition of its sustainability/energy efficiency success and its long-standing partnership with the Building Industry Association of Southern California.

## **SCG3705 Residential – Multifamily Whole Building Program**

### **Program Overview**

The Comprehensive Multifamily Incentive (CoMFI) program is an innovative deemed whole building program that aims to achieve deep energy savings in Multifamily properties. The program provides various services to assist multifamily property owners in implementing large capital energy savings projects. These services include graduated incentive tiers to promote high efficiency projects, no-cost energy audits to identify program eligible site improvements, property-specific savings and financial reports for project decision makers, and inception-to-completion project management services. Additionally, the program promotes value-added services like SoCalGas's On-Bill Financing program to secure participation from multifamily property owners with limited access to capital for high efficiency improvements.

### **Program Strategies & Outcomes**

At 2022's year-end, the contract was awarded to implement the CoMFI program after a competitive bidding process. Throughout 2023, the program focused on ramp-up, after receiving its Tier 2 Advice Letter approval in May.

## **SCG3764 Residential – LivingWise**

### **Program Overview**

LivingWise is a school-based program that engages and educates sixth-grade students in energy efficiency activities. Teachers and administrators enroll in the program through recruitment efforts that include an emphasis on Title 1 schools.

The program empowers sixth-grade students to learn how to protect natural resources and reduce energy usage at home by supplying energy efficiency materials to the teachers for distribution in the classrooms. These materials include energy efficiency kits (with water-reducing and monitoring measures for installation), student guides, take-home workbooks, posters, and a teacher guide with suggested teaching plans. This no-cost program is designed to generate immediate and long-term resource savings by bringing interactive, real-world education home to students and their families.

### **Program Strategies & Outcomes**

In 2023, the SoCalGas LivingWise Program served more than 50,000 students in the Southern California Gas Service territory, an increase of approximately 52% in program participation since 2022.

Program success was primarily due to marketing efforts which focused heavily on outreach and available analytics including:

- Revised and customized outreach materials;
- Improved tracking of outreach efforts;



- Increased touchpoints by proactively sending a SoCalGas LivingWise Program postcard to unenrolled teachers; and
- Provide \$50 incentives for use on classroom materials.

Program satisfaction is at an all-time high and feedback from participating educators is consistently positive. Examples included:

*“I think your lesson plans are wonderful.”*

*“The students liked the take-home kits and the easy-to-use booklets.”*

*“Looking forward to doing this again next school year!”*

*“Thank you for offering this program to my students.”*

*“The students enjoyed installing the materials in the kits and saving money. Keep up the program, it’s great!”*

*“My students liked the science projects within the lessons.”*

As more teachers become familiar with the LivingWise program the number of program champions organically increases. Increased familiarity with new teachers bodes well for the program’s continued growth into 2024 and beyond.

## **SCG3824 Residential – Behavioral Program**

### **Program Overview**

Behavioral based energy efficiency programs focus on energy savings as a result of changes in customer usage. Behavioral programs are mandated by the CPUC to follow three basic components:

- Must employ comparative energy usage and disclosure;
- Must be measured *ex post*, and
- Must utilize an experimental design (Random Control Trial or RCT design).

Randomly selected residential customers referred to as “treatment groups” are defaulted to receive natural gas usage feedback in the form of paper mail, email, and/or alerts featuring Advanced Meter Usage Data. Advanced Meters remotely read and transmit customers’ hourly natural gas usage information back to SoCalGas. Advanced Meter Usage Data collected together with other demographic factors are utilized in the development of personalized natural gas usage feedback communication.

## **Program Strategies & Outcomes**

In 2023, the Behavioral Program through two third-party implementers reached over 1.7 million residential customers from November 2022 through March 2023. (Behavioral Program Year is unique since November and December of the prior year allows a savings ramp up period, thereby is the start of savings estimation). One treatment cohort, wave 16 (new) launched during the program year (December 2022). Over the course of the year, the behavioral reports not only drove savings, but also served as an excellent vehicle for cross promoting other residential programs such as Energy Advisor, rebates, financing, and using the SoCalGas marketplace. The program thus increases customer awareness and encourages behavior change through helpful tips and recommendations.

The 2023 therm savings projection was developed where historical savings and weather data from 2018 through winter 2023 were utilized. At the time of the projection, the winter season (November 2022 through March 2023) had concluded, and savings had already been estimated and submitted to SoCalGas. With that in mind, the projection focused on the non-winter season from April through October 2023.

The program achieved 102% of forecasted savings, a 14% increase over 2022. Average percent savings per customer have remained steady and were equal to 1.4%, 1.4% and 1.3% in 2021, 2022, and 2023, respectively.

Overall, the Residential Behavioral Program continues to be successful in contributing significant natural gas savings to the SoCalGas energy efficiency portfolio.

## **SCG3829 Residential – Marketplace**

### **Program Overview**

SoCalGas's Marketplace website features education and incentives for energy-efficient home appliances and consumer electronics. Products featured at the site include gas water heaters, thermostats, connected home applications, gas dryers and washers. Customers who visit the site can: create their own personalized accounts; view product energy scores; view a calculation of the energy savings that can be achieved by using more energy-efficient products; view a calculation of the total cost of product ownership; and save any of their searches for future use and find rebate information. The site is mobile-optimized, meaning it is viewable on a variety of devices including smart phones, tablets, and desktops.

### **Program Strategies & Outcomes**

SoCalGas Marketplace was marketed to over 14.2 million customers in 2023 including customers from DACs resulting in approximately 418,000 customer visits in 2023. Page views, page views per visit, and time on site were also consistent in 2023 from 2022. Eco Financing, which provides financing for measures between \$250 to \$5,000, continues to be a strong motivator for customers purchasing energy-efficient appliances. Financing coupled with instant rebates and OEM discounts on select products contributed to 3,300 orders in Marketplace in 2023. Additionally, new measures were offered in 2023:

- Natural Gas Water Heaters (storage and tankless) were added to Commerce in Q2 2023.
- Natural gas ovens and high-efficient low flow shower heads were added as Choice Engine categories in Q3 2023.

Despite delays in the Eco Financing re-launch, product offerings that required testing and longer than expected paid media review process, SoCalGas Marketplace objectives were met in 2023.

## **SCG3830 Residential – Retail Partnering**

### **Program Overview**

The SoCalGas Retail Channel Support Program is a midstream Market Support offering that raises awareness and increases understanding of available efficient natural gas products, the benefits associated with efficient natural gas products, and the rebate programs available for efficient natural gas products. The program achieves its objectives through engagement with participating rebate program retailers and distributor sales associates, who, in turn educate consumers.

The Program engages retailer and distributor sales associates to train them on program offerings, energy-efficient natural gas product features and benefits, the rebate application process, and sales tips to help drive the sales of promoted, efficient products. The Program develops point-of-purchase (POP) and other marketing materials to place in retail stores to educate consumers on the features and benefits of efficient appliances and available rebates.

### **Program Strategies & Outcomes**

The first quarter of 2023 focused on ramp-up activities with the new implementer and in-store visits began in April. The program was able to achieve all goals for 2023, including store visits, retailer training, POP replacement and trade show attendance. The program was able to staff accordingly to meet goals in 2023 and brought on the subcontractor Crossmark in Q4 to maintain field presence and ramp up for goal achievement in 2024. Additionally, the field team successfully cultivated a strong rapport with retailers, further enhancing the program's presence and overcoming EE barriers such as customer lack of energy efficiency knowledge and rebate program awareness.

The program met or exceeded all the 2023 objectives:

- Over 4,000 retail/distributor store visits in SoCalGas service territory educating personnel on available residential rebates;
- Attended five trade show/retailer outreach events in 2023 such as the PHCC Winter Gala, IHACI annual trade show and Pentair pool trade and industry show promoting SoCalGas rebate program;
- Engaged with over 3,800 store associates and held over 200 training sessions in 2023; and

- Fostered new retailer relationships while maintaining existing relationships, resulting in a more robust list of eligible stores for 2024 and beyond.

## **SCG3831 Residential – EE Kits**

### **Program Overview**

To assist customers with continued water energy savings and conservation, SoCalGas offers no-cost EE kits to eligible residential SoCalGas customers. The EE kit contains a low flow showerhead, kitchen aerator and bathroom faucet aerators. The EE kit is available to customers through the SoCalGas website, outreach events and partnership activities throughout the year.

### **Program Strategies & Outcomes**

The SoCalGas EE kit program distributed over 175,000 units in 2023. A large majority of the EE kits were distributed in partnership with LADWP during Q2 and Q4 of 2023 to joint customers in the shared service territory. The SoCalGas EE kit program met its objectives, **and will have a planned closure in 2025, with other existing programs to provide these through future partnership opportunities.**

## **SCG3832 Residential – Pasadena Home Upgrade**

### **Program Overview**

The Pasadena Home Upgrade 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). Services include in-home energy and water efficiency survey and weatherization services at no cost to the eligible participants.

Measure cost and installation are funded by SoCalGas and PWP. PWP implements, manages, and administers contracting of the installer and is responsible for day-to-day coordination.

### **Program Strategies & Outcomes**

In PY2023 The Pasadena Home Upgrade program continued to treat homes with a variety of energy efficiency measures that resulted in energy savings for residents of the City of Pasadena. Since the program's inception the Pasadena Home Upgrade program successfully treated approximately 1,000 homes in 2023.

## **SCG3833 Residential – Burbank Home Upgrade**

### **Program Overview**

The Burbank Home Improvement Program offers a whole house approach to efficiency. All of Burbank's 20,000 single family homes are eligible to participate and will receive various levels of electric, water, and natural gas efficiency measures at no cost. This program is made possible by the unique partnership between SoCalGas and Burbank Water & Power (BWP). SoCalGas

and BWP jointly implement, within shared SoCalGas and the City of Burbank territory, the installation of eligible and feasible water and energy saving measures.

BWP implements, manages, and administers contracting of the installer and is responsible for day-to-day coordination.

### **Program Strategies & Outcomes**

In PY2023 over 350 single family homes participated in the program. Due to the program's success in the single-family sector of the City of Burbank, the program was expanded to include the multifamily sector in July 2023. The expansion of the Burbank Home Improvement Program will result in additional energy savings for residents of the City of Burbank.

## **SCG3861 Residential – Community Language Efficiency Outreach – Direct Install (CLEO – DI)**

### **Program Overview**

The Community Language Efficiency Outreach –Direct Install (CLEO-DI) Program, is a 100% in-language, resource, local, highly-targeted, and residential energy efficiency marketing, outreach, education, and direct install program. It targets HTR, Vietnamese, Indian, Chinese, Korean, Hispanic and African American (VICK-HA) speaking residential customers of SoCalGas.

The program markets SoCalGas's EE programs, along with energy efficiency education and training, through faith-based organizations, schools, and community events. The program's marketing efforts garner interest and lead to participation in Los Angeles, San Bernardino, Riverside and Orange Counties; those with higher densities of CLEO demographic customers in SoCalGas's service territory.

### **Program Strategies & Outcomes**

In 2023 the program achieved significant success in targeting DAC/HTR customers resulting in over 750 enrollments and over 300 tankless waters heaters installed. To enhance outreach, the program increased collaboration with faith and community-based organizations and expanded tabling events, surpassing or meeting its customer service goals of 40. The CLEO-DI program had the most significant impact on middle to low-income customers who clearly demonstrated a stronger interest in energy efficiency program offerings. This also extended to increased participation in the incentives and services offered by SoCalGas.

Additionally, successful collaboration with SoCalGas led to the refinement of processes, better servicing both customer and program needs. The program was able to stay within budget while providing excellent customer service and savings.

In 2023, the CLEO-DI Program met its program goals. CLEO-DI provides in-language seminars at booths and schools. In addition, CLEO-DI also met its resource goals by installing bathroom aerators, low-flow showerheads, tub-spout diverters, thermostats and hot-water pipe sleeves, efficient water heaters and tankless water heaters.

## **SCG3883   Residential – Residential ACE Program**

### **Program Overview**

SoCalGas Residential Advanced Clean Energy (Res ACE) is a comprehensive solution for single family customers. The advanced clean energy path begins with the delivery of cost-effective direct install measures, transitioning to an advanced clean energy opportunity for the single-family customer that can be financed by outside sources. Res ACE leverages natural gas clean energy solutions, in addition to IOU electric, municipal electric, and local agency clean energy single family opportunities offerings.

### **Program Strategies & Outcomes**

Res ACE delivered cost-effective energy savings and advanced clean energy technologies in 2023. The implementer worked to identify potential storage water heater to tankless water heater retrofits sites, resulting in successful outreach and installation of tankless water heater and other EE measures. The utilization of outreach personnel and technicians, through various programs offered by the implementer, assisted the program with meeting its goals.

In addition, the proposed delivery model of leading with cost-effective direct install measures to increase the customer's interest in tier 2 advanced clean energy technologies, such as tankless water heaters, proved to very successful resulting in over 300 tier 2 advanced clean energy technologies installed. Further there were over 2,000 complimentary walkthrough energy assessments and sales consultations performed to inform and educate the customer on energy efficiency and their property's needs.

The Program budget was increased to meet the demand of Tier 2 Advanced Clean Energy projects and the installation of cost-effective duct seal and water heating optimization energy efficiency measures. also provided a marketing boost through a tankless water survey that generated interest in tankless water heater installs.

In 2023 the Program continued to leverage their strong relationships with municipalities, other energy programs and their presence in the community to meet or exceed their goals. Program objectives met in 2023 include cost-effective energy savings, disadvantaged community program participation, customer satisfaction, hard-to-reach program participants served, and advanced clean energy measures installed.

## **SCG3884   Residential – Comprehensive Manufactured Home Program**

### **Program Overview**

The SoCalGas Comprehensive Manufactured Homes Program (CMHP) is one of two manufactured home programs offered by SoCalGas. CMHP 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 path begins with the delivery of cost-effective, direct install measures that transition to an advanced clean energy opportunity for the manufactured homes customers that can be financed by outside sources. CMHP delivers natural gas energy efficiency, clean energy, and carbon emission solutions.

## **Program Strategies & Outcomes**

CMHP continued to deliver cost-effective energy savings and advanced clean energy technologies in 2023. The proposed delivery model of leading with cost-effective direct install measures to increase the customer's interest in tier 2 advanced clean energy technologies, such as tankless waters, proved to be successful. There were over a 1,000 of complimentary walkthrough energy assessments and sales consultations performed that resulted in over 400 tier 2 advanced clean energy technologies installed.

The program objectives met include cost-effective energy savings, disadvantaged community program participation, hard-to-reach program participants served, and tier 2 advanced clean energy measures installed.

The implementer uses experience in this market segment and leverages their other programs to provide the best possible service to this market segment.

## **SCG3885 Residential – Residential Manufactured Home Program**

### **Program Overview**

The SoCalGas Residential Manufactured Homes program leverages a tiered, direct install, approach to provide manufactured home park owners and residents with convenient no cost or low-cost EE measure pathway. The program informs customers of the benefits of energy efficiency products and includes a physical assessment of tenant homes and community shared facilities.

### **Program Strategies & Outcomes**

In 2023, the program implementer celebrated significant achievements across San Luis Obispo, Kern, and Ventura County. Throughout the year, numerous contractors were onboarded and proved invaluable assets to the program. Alongside these developments, a new website was launched for contractors, enhancing the onboarding and enrollment process, and ultimately improving the customer experience.

Additionally, new partnerships were forged, leveraging the expertise of a global leader in appliance manufacturing. This collaboration minimized lead times on products for contractors, reduced unit costs, and facilitated quick turnaround times for installations, resulting in an enhanced overall customer experience.

In 2023, the program's primary objective was to streamline operations and successfully enroll hard-to-reach or disadvantaged customers to better serve their needs. Despite a late start in the year, the program managed to complete installations in over 190 homes. With the implementation of a new process and the involvement of skilled contractors armed with a diverse set of skills, the aim is to kick off 2024 with renewed vigor. The program plans to reintroduce measures such as Duct Testing and Sealing, Smart Thermostats, Showerheads with Thermostatic Valves (TSVs), Outdoor Pipe Wrap, Bathroom Faucet Aerators, and more, thereby continuing to enhance energy efficiency and customer satisfaction.



The program had multiple objectives aimed at benefiting hard-to-reach and disadvantaged communities, while also focusing on installing energy-efficient measures. The program successfully met the HTR and DAC enrollment goal and achieved energy saving through the installation of various measures, such as Duct Testing and Sealing, Smart Thermostats, Showerheads with TSVs, Outdoor Pipe Wrap, and Bathroom Faucet Aerators.

## **SCG3889   Residential – Multifamily Energy Alliance (MEA)**

### **Program Overview**

The Multifamily Energy Alliance (MEA) program is an innovative third-party program aimed at multifamily customers. This program offered customers a one-stop shop approach to driving energy efficiency upgrades in multifamily properties, existing construction, 2 units or greater. MEA targets properties from large, corporate-owned portfolios to small, individually-owned and managed sites.

### **Program Strategies & Outcomes**

The program successfully completed approximately 7,500 no-cost direct installations inside the residential dwelling units and actively sought to enroll customers in rebates on qualifying equipment in nearly 170 residential units. Additionally, new for 2023, in-dwelling tankless water heaters were offered in a co-pay model.



## Commercial Energy Efficiency Programs

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The Commercial Energy Efficiency (CEE) Programs offers California's commercial customers a statewide-consistent suite of products and services to overcome the market barriers to optimized energy management. The program targets integrated energy management solutions through strategic energy planning support; technical support services, such as facility audits, and calculation and design assistance; and financial support through rebates, incentives, and financing options. Targeted end users include all commercial sub-segments such as distribution warehouses, office buildings, hotels, motels, restaurants, schools, trade schools, municipalities, universities, colleges, hospitals, retail facilities, entertainment centers, and smaller customers that have similar buying characteristics.

The CEE Programs consist of core statewide subprogram elements, including:

- Calculated Incentives
- Deemed Incentives

IOU offerings also include:

- A robust suit of local third-party programs
- Ongoing local government partnerships
- Statewide programs for Point of Sale Food Service and Mid-Stream Water Heating

## **SCG3909 Non-Residential Energy Advisor**

### **Program Overview**

The Non-Residential Energy Advisor program provides services to support customer education and participation in energy efficiency programs. The program seeks to engage eligible customers by creating awareness of the benefits of energy efficiency, water conservation activities, and greenhouse gas reduction. The program offers customers a comprehensive energy survey to deliver education on improving business operations and advice on upgrading equipment to more efficient options. Customers are provided resources to apply for rebates or incentives which can assist them with capital investments. Resources for financial assistance programs are also provided to assist with capital investments, such as information on SoCalGas's On Bill Financing Program which provides financial assistance resources with 0% interest.

### **Program Strategies & Outcomes**

In 2023, energy consultants received comprehensive training on program promotion and outreach tools to optimally deliver program messaging and to conduct energy surveys to eligible customers. Services include hosting educational webinars for each non-residential sector, customer screening and acquisition, report generation and presentations to customers, and follow-up calls and meetings with other energy efficiency programs to drive customer action to conduct constant improvements.

In 2023, the Non-Residential Energy Advisor Program was solicited and transitioned to the Business Energy Efficiency Surveys program (BEES). As a result of the transition, there was a focus on ramp down activities on the core program.

The Non-Residential Energy Advisor Program delivered surveys to more than 90 restaurants and nearly 20 hospitals in 2023. Its successor, the BEES program, experienced a positive trend in ramp up activities as it delivered 35 restaurant surveys in 2023.

## **SCG3917 Commercial – Statewide California Food Service Instant Rebates Program**

### **Program Overview**

The California Food Service Instant Rebates Program enables non-residential CA IOU end-use customers to receive point-of-sale rebates when they purchase eligible, high efficiency Commercial Food Service (CFS) equipment from program participants. In addition to helping individual customers to make energy-efficient choices, the program influences what equipment dealers stock, and what manufacturers produce, to continually shift the market toward high-efficiency options. The program implementer provides turnkey program implementation services to SoCalGas.

### **Program Strategies & Outcomes**

The program achieved its highest-ever energy savings in 2023, which is further reinforced when evaluating the programs year-over-year metrics. When compared to 2022, there was an almost 30%

increase in total units sold yielding an increase in energy savings; 17% increase in therms saved and 7% increase in kWh saved, respectively.

The program's continued growth and success in 2023 was largely due to foundational investments made throughout 2021 and 2022. The effective core strategies of the program include frequent outreach to existing and prospective program participants, strategic advertisements in industry publications, and consistent visibility at industry conferences and events. In 2023, the program's paid advertising focused more on digital advertising, with a total reach over 8 million impressions.

Additionally, in 2023, the program benefitted from a foodservice supply chain that returned to a steadier and more stable pace, and the multifaceted disruptions from the COVID-19 pandemic have significantly subsided.

The program implementer's continued focus on direct contact with program participants ensured that marketing materials were consistently updated to reflect current floor inventory and staff were able to gain visibility and exposure with participants. Participants who carried high energy savings measures or were capable of significant sales volume were prioritized for these in-person outreach visits and calls.

The program also continued to encourage participation from sales channels and market actors that usually do not participate in rebate programs. National chain accounts continued to increase their participation, including some prominent chain restaurants in the country.

In 2023, the Instant Rebates Program delivered a record performance in energy savings achieved and in units rebated. Additionally, the program exceeded its Disadvantaged Business Enterprise (DBE) spending commitment and provided Instant Rebates to over 2,500 HTR and DAC customers. The implementer also enrolled over 25 new participants, which helped expand the geographical coverage and customer reach across the state, sales channels, and customer segments. Over 175 participant locations have been enrolled in the program.

## **SCG3918 Commercial – Statewide Midstream Water Heating Program**

### **Program Overview**

The Statewide Midstream Water Heating Program works with midstream market actors to offer point-of-sale (POS) rebates to contractors serving California Investor-Owned Utility (IOU) end-use customers. All customers with a non-residential rate structure served by one of the four IOUs are eligible for POS rebates and the program is offered uniformly across all IOU territories.

The program offers deemed POS rebates to contractors serving customers and incentives to midstream market actors for facilitating and driving sales of high-efficiency natural gas and electric water heating equipment. Additionally, the program advocates for increased awareness and sales of high-efficiency equipment through a variety of outreach, training, advertising, and engagement activities.

### **Program Strategies & Outcomes**

The implementer continued to enroll distributors in 2023 and expanded to over 290 distributor locations. Some distributors who had previously declined to enroll in the program have

reconsidered its benefits and signed up to participate. Over time, the confidence in the program increased within the distributor network through consistent value add and success stories. The implementer focused on efficient program processing with accuracy to generate momentum. Building from 2022, the implementor learned distributor point of sale systems to integrate the streamlined Midstream Portal and quickly qualified projects and found strategic methods to enhance the Midstream Portal capabilities including: responsive process flow, smart data validation, and data integration.

Two Diversity Business Enterprise (DBE) organizations support the program, one provides marketing services and the other provides quality assurance. Marketing efforts included the development of collateral to support customer in-person program awareness, such as: banners to be displayed in distributor locations. Additionally, marketing efforts expanded into creating digital engagement tools, such as banner advertisement in stakeholders' websites and social media platforms.

In the early months of 2023, program performance continued to climb steadily. Throughout the year, the program experienced more competition from other programs that were incentivizing higher rebates on electric products, up to ten times of this program. Despite more competition in the market, the implementor continued to make available all product categories and built more measures into the program. At the end of 2023, most of the incentivized measures consisted of Heat Pump Water Heater (HPWH) products.

## **SCG3882 Commercial – Small and Medium Commercial EE Program**

### **Program Overview**

The Small and Medium Commercial EE Program targets SoCalGas's small and medium commercial business ("SMB") customer facilities in San Bernardino and Riverside counties (therm usage up to 50,000 therms per year) with an emphasis on customer segments, such as restaurants, lodging, dry cleaning, retail, office, and others.

### **Program Strategies & Outcomes**

In 2023, the SoCalGas Small and Medium Commercial EE Program had its most successful year to date, dramatically exceeding its performance goals while testing new and innovative delivery strategies that increased the program's efficacy.

In the first weeks of Q1 2023, the program team designed a new approach that maximized energy savings. The program targeted specific building types with high natural gas usage promoting a handful of specific, deep energy-savings measures that could be installed by the program's participating trade professionals. As a result, the program saw unprecedented success, and reached its contractual energy-savings performance goal in March 2023.

After completing several forecasts, the program requested additional funding to support more installations and continue serving customers for the remainder of the year. The additional funds were awarded, which allowed the program to continue its services for the remainder of 2023.

In Q2 2023, the program launched a second innovative strategy with the Commercial Fryer Campaign. This targeted campaign was designed to offer Disadvantaged and Hard-To-Reach

customers brand new, energy-efficient commercial fryers for just a small copay. Overall, the offer provided the most underserved SoCalGas customers with an opportunity to lower their gas bills and receive much needed relief. This approach allowed the program to experience notable success within this customer segment and foodservice equipment.

Additionally, the implementer submitted an abstract and was selected to present at the 2023 Energy Efficiency as a Resource conference in Philadelphia, PA, hosted by the American Council for an Energy-Efficient Economy (ACEEE). The presentation shared the evolution of the program's strategies and shared how the unique tactics developed through the program support climate goals while maintaining customers' needs in close consideration.

Despite early depletion of funding and limited measure mix diversity, the program was very successful in implementing some measures but encountered challenges in promoting others.

In 2023, the program achieved the following milestones:

- Exceeded the annual energy-savings performance goal;
- Completed outreach, enrolled, and served Disadvantaged and Hard-To-Reach customers; and
- Executed a contract extension with SoCalGas to continue implementation through 2027.

## **SCG3887 Commercial – Commercial Building Energy Solutions and Technologies Program (CBEST)**

### **Program Overview**

The Commercial Business Energy Solutions & Technology (CBEST) program delivers equipment incentives and support to qualifying commercial business customers throughout the SoCalGas territory, except San Bernardino and Riverside Counties, with consumption of fewer than 50,000 therms annually. The program is designed to identify energy-efficiency enhancements that can effectively lower operational expenses, enhance comfort for both customers and employees, and minimize maintenance efforts and expenses, while fostering significant savings in both energy consumption and costs.

### **Program Strategies & Outcomes**

At the end of 2022, the team conducted a thorough analysis to identify strategic measures that would propel the program forward in 2023 and enable significant improvements to track towards program goals. The analysis revealed a need in the market for natural gas modulation valves (GMVs). Subsequently, the outreach team connected with the exclusive manufacturer of GMVs in California to initiate project collaborations.

The outreach team has forged meaningful connections with trade professionals and manufacturers, strengthening support for the program's measures. This ongoing effort aims to expand CBEST's portfolio of established connections, contributing to the fulfillment of its objectives in 2023 and beyond.

The program encountered a lack of customer engagement in the restaurant/kitchen industry causing the program to fall short of their kitchen equipment incentives goals. The direct install tankless water heater initiative experienced less success this year compared to the previous year, primarily due to decreased interest caused by reduced incentive amounts.

Due to program implementation barriers and uncovered challenges mentioned above, the CBEST program did not meet key performance indicators associated with project enrollments, customer engagement, or savings. However, the program has established strong meaningful stakeholder connections within the territory which support a positive outlook for 2024.

## **SCG3891 Commercial – Service RCx+**

### **Program Overview**

Service RCx+ provides population-level normalized metered energy consumption (NMEC)-based energy savings through the direct implementation of RCx and optimization services at large and very large commercial facilities throughout the SoCalGas service territory, prioritizing the specific segments of commercial offices, health care, and laboratories. The program evaluates potential participating facilities through interval data analytics. Individual project savings are measured and verified, following the initial treatment, by comparing actual energy consumption over a reporting period with an NMEC baseline model specific to the facility. Energy data and analytics used during the performance maintenance period will promote and ensure persistence, detect unexpected changes, and, if necessary, help the program staff coordinate with facility personnel to provide additional training and corrective action.

### **Program Strategies & Outcomes**

The program conducted site visits and developed energy efficiency measures for two hospital campuses. The developed measures won approval from the customers' engineering teams and are pending approval from the customers' legal departments.

The program encountered delays in measure implementation due to the extensive internal approval process that customers have in place to gather signatures for program installation agreements.

## **SCG3892 Commercial – Large Commercial Program**

### **Program Overview**

The Large Commercial Program (LCP) is an energy efficiency program that offers financial incentives for the implementation and verification of natural gas-saving technologies. The program supports a comprehensive list of upgrades and provides technical assistance and financing options. The LCP serves large and very large commercial customers with annual gas consumption of more than 50,000 therms in the Southern California Gas Company (SoCalGas) service territory.

Services performed by the LCP at no-cost to the customer include:

- Project identification with energy-saving forecasts including energy efficiency and return-on-investment calculations;

- Building energy audits (where applicable);
- Energy engineering and technical assistance;
- Design and procurement advice;
- Measurement and verification (M&V) with normalized metered energy consumption (NMEC) techniques; and
- Assistance in understanding and pursuing financing opportunities

### **Program Strategies & Outcomes**

In early 2023, the program focused on enabling a seamless customer enrollment experience by enhancing system configuration and finalizing the program rebate catalog. These activities facilitated customer applications for both the deemed and custom portions of the program in the second quarter of 2023. As a result, two deemed projects were identified and delivered by the end of 2023.

During Q3, the program launched its website, which allowed SoCalGas customers to contact the implementer directly to inquire about the program and its enrollment process. As a result, the program received its first NMEC project for review along with a deemed project for a large hospital.

## **SCG3898 Commercial – Behavioral Program**

### **Program Overview**

Behavioral based energy efficiency programs focus on energy savings resulting from changes in customer usage. Behavioral programs hereinafter are mandated by the CPUC to follow three basic components:

- Must employ comparative energy usage and disclosure;
- Must be measured ex post; and
- Must utilize an experimental design (Random Control Trial or RCT design)

Randomly selected customers referred to as “treatment groups” have been defaulted to receive natural gas usage feedback in the form of paper mail, email, and/or alerts utilizing Advanced Meter usage data. Advanced Meters remotely read and transmit customers’ hourly natural gas usage information back to SoCalGas.

Advanced Meter usage data, collected with other demographic factors, is used to develop personalized natural gas usage feedback communication.

### **Program Strategies & Outcomes**

The Commercial Behavioral Program launched in November of 2023 for the first time. Reaching 18,000 SMB customers, it’s the first treatment wave created. Customers in this cohort are scheduled to receive up to 13 email alerts and two paper reports throughout the year. The treatment cohort is comprised of a cross-section of businesses: office, grocery/convenience, restaurant, lodging, retail, education, healthcare, and warehousing.



During 2023 SoCalGas focused on collaborating with the implementer on building the foundation for the program and accomplishing a successful launch in time for winter season. First winter season savings will be calculated in Spring 2024.

The program shows excellent engagement results on its' first year of deployment. SMB behavioral programs are important mechanisms to reach this hard-to-reach customer population, however, given the small population size and diverse customer set, measuring savings from the program is expected to be challenging - which is typical for SMB behavioral energy efficiency programs across the country. As a result, savings and performance will be closely monitored and modifications in the approach may be considered.

## **SCG3910 Commercial – Non-Residential Energy Efficiency Calculated Incentive Program (EECIP)**

### **Program Overview**

The Non-Residential Energy Efficiency Calculated Incentive Program (EECIP) offers incentives for customized energy efficient projects. In addition to incentives, the program provides customers technical and calculation assistance, based on calculated savings, to influence the design and installation of energy efficient equipment and systems. This program covers retrofit and retro-commissioning energy efficiency projects. Incentives are paid on the energy savings above and beyond baseline energy performance, which include state-mandated codes, federal-mandated codes, industry accepted performance standards, or the other baseline energy performance standards. This is a cross-cutting program covering the Agricultural, Commercial, Industrial and Public sectors.

### **Program Strategies & Outcomes**

The program streamlined efforts with the Programs Team, Account Executives, Engineering Services, and other departments to identify active projects in the pipeline and ensure timely submission to the Custom Measure Project Archive (CMPA) for CPUC's Energy Division Custom Project Review process. The EECIP is closed to new enrollments in support of the transition to new third-party programs.

As the program ramped down, program staff ensured that customers were aware of energy efficiency offerings until the third-party programs were launched. To comply with the CPR process, the program experienced challenges with customer commitments, particularly for those with complex projects and customers who face strict internal timelines for production and budget approvals.

The program successfully closed seven projects in 2023. Projects pending completion under the EECIP program will complete installation and remaining milestones under EECIP. This will allow customers to continue working alongside the supporting staff they trust to achieve and receive the identified savings and incentives. New project leads will be referred to the applicable third-party programs. The program's objective is to promote energy efficiency projects with custom measures move forward without a gap in service until the respective third-party program is fully launched and actively enrolling customers.



## **SCG3911 Commercial – Non-Residential Deemed Incentive Program**

### **Program Overview**

The Non-Residential Deemed Incentives, marketed as the Energy Efficiency Rebates for Business (EERB) program, offers rebates to customers in an easy-to-use mechanism to offset the cost of off-the-shelf energy saving equipment to cost-effectively subsidize and encourage adoption of mass market efficiency measures through fixed incentive amounts per unit/measure. The program is made up of four market sectors that include: commercial, public, industrial, and agricultural.

### **Program Strategies & Outcomes**

The program has continued to utilize its working partnership with SoCalGas's Trade Professionals, Account Executives, and Industrial Service Technicians to present energy efficiency program details to their customers. In 2023, the marketing campaign promoted energy efficiency awareness and encouraged rebate participation through the online rebate application. The campaign breakdown focused on 40% water heating measures, 20% foodservice equipment and 40% general program awareness.

The agricultural sector experienced a decrease in therm savings in 2023. It continues to be affected by greenhouse heat curtains and infrared film measures which were inactive measures in 2021. These projects have a long lead time to complete installation. Greenhouse heat curtains and infrared film became active in 2022. Savings resulting from projects including these measures are expected upon project completion in 2024.

Program process improvements included an interest form to optimize customer communication for the program. The interest form provided customers a faster and user-friendly method to inquire about the program and receive feedback from a SoCalGas representative. Additionally, to accommodate customers seeking to release their rebate check to their contractor to directly offset a portion of the project costs, a check authorization form was developed to capture written consent from applicants to release a rebate check to a third-party of their choice.

In 2023, in comparison with the previous year, the program's savings almost doubled within the industrial sector. Projects leading to such success included steam boiler stack economizers and process heating boilers.

## **Industrial Energy Efficiency Programs**

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The Industrial Energy Efficiency (IEE) Programs provide services to improve the energy efficiency of industrial facilities in California. The primary services offered to industrial customers include:

- Energy audits covering EE and demand management opportunities;
- Technical assistance in measure specification, procurement, and project management;
- Post-installation inspection and analysis to verify performance;
- Continuous energy improvement consultation; and
- Financial incentives and project financing for installed measures.

Financial incentives are based on deemed energy savings by per unit of equipment, calculated energy savings by per unit of energy, and measured savings at the meter through Strategic Energy Management and Normalized Metered Energy Consumption methodologies.

Each IOU offers local programs that complement and enhance the core offerings in their region. SoCalGas's local portfolio mix is specifically designed to enhance energy efficiency and demand-side management (DSM) opportunities for industrial customers, including financial solutions.

### **SCG3714 Industrial – Strategic Energy Management**

#### **Program Overview**

The Industrial SEM Program engages cohorts of large industrial customers in two-year cycles to drive persistent energy savings across an entire facility. Specifically, the program includes a full spectrum of services including:

- Education;
- On-site “Energy Treasure Hunts” to identify, track, and prioritize energy saving opportunities; and
- On-site and remote support for: goal development, employee engagement, energy data collection, project savings, and persistence strategies.

Energy savings opportunities in the SEM program include low-cost behavioral, retro-commissioning, and operational (BRO) measures. The program measures savings at the meter level, using a normalized regression model that accounts for factors such as production volume and weather, which affect energy consumption. Savings can also be measured using a bottom-up engineering analysis approach. Customers receive incentives for BRO measures and for achieving key milestones.

This program complies with the latest versions of the California Industrial SEM Design Guide and the California Industrial SEM Measurement and Verification (M&V) Guide, which have been accepted by the Commission.

## **Program Strategies & Outcomes**

In 2023, the program included seventeen of SoCalGas's largest industrial customers across four cohorts:

- The first-of-its-kind gas-only cohort completed its third year of SEM and is on track to accomplish the cycle savings goal;
- The second gas-only cohort completed its first year and began its second year in SEM. This cohort is on track to accomplish the cycle savings goal;
- The first SCE and SoCalGas co-funded cohort completed their fifth year and started their sixth and final year. This cohort is on track to exceed their cycle goal;
- The second SCE and SoCalGas co-funded cohort completed their fourth and final year. This cohort also exceeded their savings goal. At the end of 2023, all members of the cohort graduated from SEM due to a low level of savings remaining at each site;

Participants continue to generate most of their savings with BRO measures, such as:

- Establishing standby and shutdown settings for various pieces of equipment;
- Optimizing operational setpoints for boilers, air handlers, and burners; and
- Encouraging improved maintenance practices such as repairing leaks and seals.

While supply chain issues lessened in 2023, participants continued to experience the challenge of retaining qualified staff, primarily in maintenance positions. This resulted in significant turnover of energy team members at some sites, leading to some challenges with energy team engagement consistency.

Despite these challenges, the program achieved the following:

- Generated substantial BRO savings from a variety of gas-using equipment;
- Maintained high cost-effectiveness;
- Showed persistence of savings across multiple years of participation; and
- Fostered relationships between customers and their SoCalGas account executives.

## **SCG3757 Industrial – Small Industrial Facility Upgrades**

### **Program Overview**

The Small Industrial Facility Upgrades Program (SIFU) assists SoCalGas industrial customers across all sizes and industrial segments in becoming more energy efficient and productive through the implementation of efficient technologies and processes. It is designed to help industrial customers reduce their energy consumption by providing incentives and rebates to invest in energy efficiency measures. SIFU measure offerings include calculated custom process improvements and deemed measures. It includes measures and technologies with low market penetration.

## **Program Strategies & Outcomes**

In 2023, program activities included customer introductions led by SoCalGas account executives and follow-ups with end-use customers. SIFU focused on the project pipeline initiated in past program years and working to complete such project commitments. Field visits included pre- and post-inspection activities including customer education on program benefits, rule changes, potential opportunities, and program closure.

The Program encountered multiple challenges in 2023 such as delayed project commitments due to supply chain issues, contractor material and labor shortages, and business closures due to production costs. Additionally, the implementer continued efforts to develop and maintain customer engagement to address issues such as identifying and providing acceptable documentation on custom projects' influence, baseline determinations, and free ridership screening. Increased scrutiny and screening of project and service requests were applied to reduce resource expense on activities that do not yield energy savings. This includes focused program resources in regions that have high potential for energy savings.

Despite challenges encountered in 2023, SIFU successfully engaged customers, progressed projects from the pipeline to the fully installed phase, and issued customer incentives for completed projects. The implementer will finalize project commitments to officially close the program in 2024.

## **SCG3942 Industrial - Industrial Savings, Training, Assistance, and Rebates (Industrial STAR) Program**

### **Program Overview**

The Industrial Savings, Training, Assistance, and Rebates (Industrial STAR) program offers a suite of energy efficiency services to SoCalGas's industrial-sector customers, tailored to their business type, size, and financial needs. It serves small, medium, large, and hard-to-reach customers in the Food and Beverage Manufacturing sector across the entire SoCalGas territory. The program includes strategic energy management concepts, training for customers and vendors, high-quality energy engineering support, and an innovative incentive and financing structure.

### **Program Strategies & Outcomes**

Industrial STAR received advice letter approval in May 2023 and successfully completed pre-launch deliverables, including customer outreach activities and filing of the program Implementation Plan.

The program experienced delays in launching customer enrollment activities as the program developed customer-facing materials. SoCalGas worked alongside the program implementer to review program outreach documents.

In preparation for 2024, program staff connected with SoCalGas account executives to provide program training and establish coordination for program outreach activities. The program is expected to commence participant enrollment efforts in 2024.

## **SCG3943 Industrial - Industrial Energy Partners (IEP)**

### **Program Overview**

The Industrial Energy Partners (IEP) Program provides energy efficiency services, technical assistance, incentives, and rebates to the industrial sector within the SoCalGas service territory. The Program targets textile, wood, paper, mining, aerospace, machinery, asphalt, cement, minerals, metals, and plastics using a downstream market approach and leveraging the custom and deemed savings platforms to deliver cost-effective energy savings.

The primary objectives contributing to the program design are:

- Increase the cost-effective efficiency savings achieved in the industrial sector;
- Provide industry-specific technical support for customers and establish strategic partnering with selected manufacturers and trade allies; and
- Support long-term energy efficiency planning and continued customer engagement to maximize savings delivery.

### **Program Strategies & Outcomes**

IEP received advice letter approval in May 2023, and immediately commenced launch activities. Pre-launch tasks were completed successfully, and the program was approved for outreach to eligible customers in October 2023.

The program experienced delays in developing outreach materials essential to customer enrollment. To assist with the process, SoCalGas collaborated with the implementer to review customer-facing materials.

IEP successfully launched and completed most startup activities according to the approved timeline. Program staff coordinated efforts with SoCalGas account executives to plan and strategize outreach efforts and the implementer began outreach and educating customers about the program.

## **SCG3944 Industrial - Refinery Gas Energy Efficiency (RGEEP) Program**

### **Program Overview**

The Refinery Gas Energy Efficiency Program (RGEEP) is a pay-for-performance third-party program available to the full range of SoCalGas Refinery customers North American Industry Classification (NAICS 32) in SoCalGas's service territory.

RGEEP is designed to deliver comprehensive and sustained energy savings through downstream energy and operational savings while building a culture to support energy management excellence and operational efficiency.

The program offers refinery energy management expertise, comprehensive facility audits, energy efficiency measure (EEM) analysis, technical services, financial incentives, and financing support. The program engages a wide variety of stakeholders throughout the organization to

understand near-term and long-term customer objectives and risks, site conditions, and requirements to align program focus with customer priorities, and to address opportunities through both capital and operational strategies. RGEEP provides refinery staff with knowledge and tools to monitor and continuously improve system performance and savings persistence. Savings persistence is supported by submetering, data tracking, and performance monitoring.

## **Program Strategies & Outcomes**

The program received CPUC approval in May 2023 and completed all required launch deliverables in the appropriate and anticipated timeframes. The program established a cadence in working with SoCalGas programs staff and instituted weekly scheduled meetings to discuss ongoing program efforts.

In August 2023, the program received the Privacy Third Party Review Status as complete. As such, September marked the beginning of the program's ability to begin outreach to SoCalGas Account Executives (AEs) and engaging with customers. Significant progress was made by the program by developing relationships with SoCalGas account executives, including determining communication preferences, better understanding the account executive needs, and working together to develop customer facing program presentation materials.

In November, the program received and reviewed customer contact lists from which a plan was made in conjunction with SoCalGas AEs for initial targeted marketing and outreach. With support from the AEs, the program began presenting to select refinery customers in November and December of 2023 and the customer targets and number of estimated participants for Year 1 has been set as the targets for Year 2.

## **SCG3945 Ind Innovations to Industrials (SEM)**

### **Program Overview**

The Innovations to Industrials Strategic Energy Management (ITI SEM) Program engages cohorts of large industrial customers in two-year cycles to drive persistent energy savings across an entire facility. Specifically, the program includes a full spectrum of services:

- Education;
- On-site "Energy Treasure Hunts" to identify, track, and prioritize energy saving opportunities; and
- On-site and remote support for technical project assistance, goal development, employee engagement, energy data collection, project savings calculations, and persistence strategies.

Energy savings opportunities in the ITI SEM program include operations and maintenance (O&M) measures. The program weaves innovative elements devised to boost participation and savings. Savings are measured at the meter level when possible, using a regression model that normalizes energy use for factors such as production volume and weather. Savings can also be measured using a bottom-up (project-by-project) engineering analysis approach. Customers receive incentives for O&M measure savings and for achieving key milestones.

## **Program Strategies & Outcomes**

During 2023, the program progressed through the start-up phase:

- Start-up administrative tasks completed include the development of the implementation plan, kick-off meetings, program manual, and quality assurance plan;
- Development and completion of the marketing plan, enrollment agreement, marketing collateral, and program training materials;
- Initial recruiting efforts commenced with the engagement of the Account Executives; and
- Implementer was successful in recruiting six participants for the first cohort.

The program advice letter was approved in May 2023 and pre-launch activities began with outreach to account executives, review and revisions of program materials and cyber-security system protocols. The program launch date shifted from July to October as requirements were completed.

## **Agricultural Energy Efficiency Programs**

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The Agricultural Energy Efficiency (AEE) Program facilitates the delivery of integrated energy management solutions to California's agricultural customers. The program offers a suite of products and services, such as strategic energy planning support, technical support services, facility audits, calculation/design assistance, financing options, and financial support through rebates and incentives. In addition, the program adopts and supports the strategies and actions of the Agricultural and Industrial chapters of the CLTEESP and the energy efficiency business plan.

The AEE Programs target end-users such as irrigated agricultural growers (crops, fruits, vegetable, and nuts), greenhouses, post-harvest processors (ginners, nut hullers, and associated refrigerated warehouses), and dairies. Due to North American Industry Classification System (NAICS) designations, food processors have traditionally received IOU services through the Industrial program offering. However, facilities with on-site processing that are integrated with growers and their products, as is the case with some fruit and vegetable processors (canners, dryers, and freezers), prepared food manufacturers, wineries, and water distribution customers may be addressed by this program's offerings.



## **SCG3890 Agricultural – Agriculture Energy Efficiency (AgEE)**

### **Program Overview**

The Agriculture Energy Efficiency Program (AgEE) seeks to accelerate the uptake of energy efficient cost-effective solutions through delivering technical assistance to drive customer awareness of both EE and non-EE measure benefits. AgEE is open to all agricultural SoCalGas customers classified under NAICS code 11 and emphasizes adoption of cost-effective measures with long useful life. AgEE also identifies and pursue grants to further drive customer adoption of new and underutilized technologies.

### **Program Strategies & Outcomes**

Throughout 2023, AgEE team established relationships with new customers, equipment vendors, and agricultural community trade allies throughout 2023 to further cement the program's influence within SoCalGas's service territory. As a result, customer enrollment in the AgEE program increased substantially in 2023, with a total of 35 project installations, a 45% increase over 2022. Collaboration with SoCalGas account executives continued to play an important role in facilitating introductions to customers and obtaining project documentation.

Program participation by HTR and DAC customers trended higher in 2023 with 60% of approved projects being installed by HTR customers, and 22% by DAC customers. Five direct install projects were performed, including the program's first process boiler direct install project; this project was installed by a newly enrolled vendor in the implementer's Contractor Management Portal. The AgEE team received overwhelmingly positive feedback from DAC and HTR participants stating the importance of higher financial incentives to enable their participation.

The diversity of gas saving measures incentivized through AgEE increased in 2023. One notable success is the increase in the number of process boiler projects -- a total of 15 process boilers with a combined input capacity of more than 64,000 kBTU/hour were installed in 2023, 10 of which were high efficiency condensing boilers. Among these boiler projects was the program's first cattle farm participant.

Preliminary discussions with customers on potential custom projects also began, which may translate into the program's first custom project in 2024.

AgEE performed technical assistance to numerous customers throughout 2023, primarily through providing unbiased guidance on equipment selection and energy efficiency project economics. The AgEE team continued to promote the SoCalGas OBF program and assisted two customers in completing applications which were successfully funded.

Program outreach efforts in 2023 included attending four events, direct outreach to customers, regular collaboration, and site visits with SoCalGas account executives, and program promotion through agricultural community trade allies. Events attended in person by the AgEE team included the three-day World Ag Expo in Tulare, the Resilient Harvest Conference in Long Beach, speaking on the Efficient Harvests Luncheon panel in Carpinteria, as well as at the Santa Barbara Flower Growers Association annual meeting.

Additionally, the AgEE team presented at several targeted webinars hosted by the Resource Innovation Institute and the Greenhouse Lighting and Systems Engineering Consortium. Customer familiarity with the AgEE program continued to improve in 2023, with word-of-mouth about the program spreading within the agricultural community.

While the program experienced some challenges in lengthy timelines from application to payment as well as lower than expected number of DAC customers, those issues did not impact overall goals in 2023.

#### Program Objectives Met:

- Total number of 2023 projects and the percentage of customer enrollments that converted to completed installations exceeded expectations; and
- The percentage of projects associated with HTR customers greatly exceeded program target.

To reach DAC goals in 2024, the program is planning dedicated outreach to disadvantaged communities including Hmong, Chinese, and Spanish speaking customers; translated materials will be produced to allow easier outreach to these communities. For DBE spending, the implementer is planning to recruit at least one DBE classified subcontractor and potentially outsourcing certain program tasks to a DBE classified business.

The AgEE team built a significant project pipeline and anticipates meeting or exceeding program goals in subsequent program years.

# Statewide Emerging Technologies Program

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## Program Overview

The Statewide Emerging Technologies Program (ETP) supports the CA IOU EE programs and helps California meet its energy reduction goals by identifying and screening potential technologies, assessing them to validate performance and customer acceptance, performing in-situ demonstrations, gathering actionable information for use by EE programs and publishing the results of these activities. Technology that performs well is recommended for inclusion in IOU customer education and rebate programs for wide use by utility customers.

## Program Strategies & Outcomes

### Statewide Gas Emerging Technologies (GET) Program

The GET program built on the early success during the 2023 program year. The program ramped up to exceed its goal by initiating fifteen new projects and significantly exceeded the number of outreach goal by completing seven virtual events. These 15 projects ranged from market assessments and readiness evaluations to technology characterization projects with the objective to qualify subsequent technology proofing efforts. These projects range from hydrogen labeling, Controlled Environment Agricultural efficiency measure opportunities, to gas heat pump characterization projects.

For a complete list, see Table 1 – Gas Emerging Technologies Completed Projects. The Controlled Environment Agriculture (CEA) Market Study event had significant interest with over fifty participants registered and was well attended by over thirty attendees. A Technology Advisory Group was convened to inform the updated research plan for 2024 to identify potential technologies for future projects.

*Table 1 Gas Emerging Technologies Completed Projects*

Water Heating Market Study
Evaluation of Emerging Water Heating Technologies
Commercial Food Service Market Characterization
Boiler Related EE Measure Assessment Study
Hydrogen Readiness Labeling of Gas Appliances
Research and Analyze the Infrared Heaters Market
Gas-Fired Heat Pump Water Heating & Combination System Pilot – Phase 1

Market Assessment of Emerging Ultra-Low NOX Burner Technologies
Controlled Environment Agriculture and Greenhouse HVAC Market & Technology Study
Hospital End-Use Market Assessment

ETP moved forward with identifying technologies and initiating new SW GET projects. ETP was able to complete its local ET projects, communicating project results, supporting technology transfer, and supporting technology development by working closely with program managers, technology actors and industry groups.

SoCalGas ETP met its IP objectives through the activities and results highlighted above.

## **Statewide Codes & Standards Program**

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In accordance with D.18-05-041, D.22-03-010, and D.22-04-034, SoCalGas's role in Statewide Codes & Standards Advocacy Programs is limited to the transfer of funds to the statewide codes and standards lead for program implementation. Please reference lead Program Administrator Annual report for 2023 activities.

## **Workforce Education & Training (WE&T) Program**

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### **SCG3729 WE&T – Integrated Energy Efficiency Training**

#### **Program Overview**

The Statewide Workforce Education and Training (WE&T) Program represents a portfolio of education, training, and collaborative engagement between the IOUs and other stakeholders participating in energy education and training. SoCalGas WE&T targets an audience of incumbent and new workers entering the workforce through technical upskill and core energy education. WE&T actively seeks to deliver measured advancement through outreach in DAC and HTR communities.

#### **Program Strategies & Outcomes**

SoCalGas's Integrated Energy Efficiency Training (IEET) program continued providing relative industry-related training to attract audiences representing various occupations. These trainings allowed immediate application of increased knowledge and skills to trades & professions, emphasizing the value of the SoCalGas IEET program portfolio. During 2023, SoCalGas's IEET program conducted more than 180 seminar/webinar/training sessions, more than 135 outreach consultations, and over 125 equipment demonstrations.

The WE&T program through IEET delivered a hybrid of online and in-person webinars/seminars, providing an effective, cost-efficient delivery of training to portfolio customers. As the training evolves the WE&T team will continue to develop and implement emerging technology applications for delivering relevant training to customers.

IEET continued its' Heating, Ventilation, Air Conditioning & Refrigeration (HVAC/R) industry education and training utilizing both online and in-person delivery methods. The training is in demand and highly valued by the industry workforce. The online delivery of classes was integrated with hands-on training sessions through video & online demonstrations. This training is important to both new and current workers in efforts to achieve industry accreditations and certifications which include HVAC/R Support Training and North American Technician Excellence (NATE) preparation courses and exams.

The SoCalGas WE&T team collaborated with the SoCalREN to market & deliver online workshops & skill enhancement to HVAC contractors as part of its outreach. The IEET program delivered high quality and informative course material designed to address gaps in new and existing workers' educational needs. Examples include Building Science seminars, Distributed Energy Resources and Steam License Preparation seminars. The training

emphasized compliance with current building code design, energy-efficiency standards, and energy conservation including water resources.

## **SCG3760 WE&T – HERS Rater Training Advancement**

### **Program Overview**

The HERS Advanced Rater Training 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. The program focuses on participants involved in new and existing engineering and construction in the SoCalGas service territory. 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.

### **Program Strategies & Outcomes**

CHEERS is California's largest Home Energy Rating System (HERS) Rater provider. Under regulatory oversight by the California Energy Commission, CHEERS implements parts of California Building Energy Code Title 24. The 2023 implementer identified market sectors in a targeted effort to reach prospective candidates who reside and work in HTR, DAC and low-income communities in SoCalGas's service territory.

The implementer and CHEERS delivered HERS Rater training courses to more than 1,400 eligible trainees. Based on direct experience and demonstrated success of live virtual classroom and self-directed on-demand training methods, the implementer optimized scheduling of training events to achieve the maximum number of trainings.

To date, 48 of 203 SoCalGas HERS Rater by CHEERS trainees have completed full coursework (21%) and 15 of 48 trainees have become fully certified, including external EPA 608 certification and completing the HERS Rater field test portion (31%).

The implementer has established relationships with many builders, HERS Raters, builders' trade groups, and their electrical contractors. Additionally, the implementer leveraged its strong relationship with the California Building Industry Association (CBIA) and the local Building Industry Association of Southern California (BIASC) as a channel partner and actively outreached to over 200 non-profit and educational organizations.

To maximize recruitment, training access, and completion of the HERS Rater training program in DACs, CHEERS works with local community colleges to recruit students and provide access to the laboratories for critical hands-on training. Furthermore, CHEERS has numerous existing regulatory and industry partnerships and relationships that the team leverages to provide leads on customers who might benefit from the services of a HERS Rater.

Monthly marketing efforts are made via e-mail to the existing student database which announces classes at least one month prior as well as refreshing the schedule and landing page on the website. Phone outreach to HVAC companies and distributors, local government building

entities and other building professionals has proven to be effective in reaching potential students who might not otherwise be aware of class offerings.

The HERS Rater Training Program is implemented to leverage resources and funding from other utility, state, and local programs. SoCalGas's commitment to DBEs is an important component of the program. Relationships with DBE subcontractors who conduct the training continue to provide strong percentage numbers impacting total spend each year. Curriculum development and delivery is an essential part of the program with a major emphasis on Building Energy Science and HVAC curriculum that includes hands-on training with classroom delivery of the most current industry standards.

Within the CHEERS training program, individuals are designated as "enrollees" until they fulfill specific criteria. To be recognized as an "eligible trainee," enrollees must complete a survey, providing city and zip code information and fulfill a pre-requisite course.

Enrollees who do not reside, work, or attend school within SoCalGas territory remain as enrollees and do not contribute to the program's goal count. Those meeting eligibility criteria transition to becoming eligible trainees.

After completing the Introduction to the HERS Rating Industry course, participants are surveyed for interest in HERS Rater certification. Upon determination of eligibility by the CHEERS team, individuals are assigned to the HERS Rater Certification course track.

### **HERS Rater Certification Track**

The training and testing required for California HERS Rater certification consists of 3 facets:

1. Online Training - Complete videos and materials covering the HERS process. Quizzes at the end of each module test proficiency. Depending on pace, course duration is 20 to 30 hours.
2. Knowledge Exam - A comprehensive exam must be completed with an 80% or higher score.
3. Field Training - Schedule and meet a CHEERS trainer in the field for hands on training with HERS testing equipment.

The program continues to refine and improve its delivery as it determines ways it can strategically and operationally support the WE&T goals of SoCalGas.

## **SCG3901 WE&T – Community Support Outreach (CSO) Program**

### **Program Overview**

The Community Support Outreach (CSO) Program is an in-language, non-resource, highly targeted EE marketing, outreach, and education program. The program targets DACs and HTR customers in underserved communities, such as Vietnamese, Indian, Chinese, Korean, and Hispanic speaking customers, and other ethnic customer segments across all sectors. The CSO

program goals were revised to increase focus on community booths, local government engagement, churches, and door-to-door marketing to the targeted sectors.

The program markets SoCalGas's EE programs with energy efficiency education and training, through professional organizations, customer intermediaries, faith-based organizations, and community events. The program's marketing efforts garner interest and lead to participation in SoCalGas's EE Programs. CSO is active in all SoCalGas territory.

### **Program Strategies & Outcomes**

The CSO program conducted outreach through more than 1,700 door-to-door marketing efforts, targeting small commercial and multifamily properties within the SoCalGas territory. This initiative spanned across various cities throughout the SoCalGas service territory.

The program secured event space and time by scheduling community booths and seminars with community centers, public libraries, municipal utilities, civic organizations, faith-based organizations (FBOs), and community resource events. The CSO program successfully held over 160 booth events, encompassing various sectors such as local government, partnership events, churches, and FBOs.

Additionally, the program conducted 9 seminars across the SoCalGas territory, reaching cities such as Los Angeles, Rosemead, Montebello, Downey, Pomona, Monterey Park, Ontario, Chino, and San Bernardino. This extensive outreach effort effectively connected with more than 680 interested customers seeking information on SoCalGas rebates in 2023.



## Finance

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### SCG3735 Finance – On-Bill Financing

#### Program Overview

On-Bill Financing (OBF) offers interest-free, unsecured, repayment of loans on-the-utility-bill that work in conjunction with SoCalGas energy efficiency rebate programs.

The program is designed to facilitate the purchase and installation of qualified energy efficiency measures by non-residential customers who lack up-front capital to invest in real and sustainable long-term energy cost reductions. Loan terms range from up to ten years for commercial customers and up to fifteen years for government agency customers. The eligible loan amount is based on the project cost, less incentives, or rebates, up to the loan maximum of the OBF product and within the loan term thresholds.

Customer loan repayments are calculated to approximately equal the monthly energy savings and repaid through a fixed monthly installment on their utility bills. There is no prepayment penalty and loans are non-transferable. Partial or non-payment of loans could result in gas service disruption. The OBF program serves as a tool to remove capital restraint barriers for customers interested in moving forward with deeper energy efficiency retrofits.

On-Bill Financing (OBF) program features:

- Zero percent interest;
- No closing costs;
- Unsecured loan;
- Loan repayment added directly to SoCalGas utility bill; and
- Works in conjunction with utility energy efficiency rebate programs.

#### Loan Terms:

Customer Segment	Loan Amounts	Loan Terms
Business	Up to 10 years	Min- \$5,000- Max \$250,000
Multi-Family	Up to 10 years	Min- \$5,000- Max \$250,000
Local Government/Public Sector	Up to 15 years	Min- \$5,000- Max \$250,000
State of California	Up to 15 years	Min- \$5,000- Max \$1,000,000

## **Program Strategies & Outcomes**

The OBF program continued working with SoCalGas customer account representatives, third-party implementers, Trade Professionals, Multifamily Whole Building Program, Foodservice group, and other internal teams to create awareness and education through webinars to encourage customer participation.

In 2023, the CPUC approved the program team's proposal to expand OBF measure offerings to include all clean energy technologies, paving the way for more comprehensive future projects.

The OBF team facilitated monthly meetings with the other IOU OBF program leads to share best practices and to collaborate on administrative, policy, regulatory, and program changes.

The OBF program team was invited to share the program details on live radio during the SoCal Restaurant Foodservice show and launched a targeted email campaign to hospitality customers. As a result of the marketing activities the OBF team disbursed 15 OBF loans projects for over \$500,000, representing the second largest disbursement since program inception.

## **SCG3737 Finance – SW-New Financing Offerings**

### **Program Overview**

CPUC Decision (D.) 13-09-044 authorized the development of statewide financing pilot programs leveraging third-party capital products to increase the availability of financing for underserved sectors and encouraging deeper energy savings.

A key feature of the financing pilots is providing credit enhancements and an On-Bill Repayment (OBR) option to attract private capital support for financing energy improvement projects. The pilots were developed to reach residential, multifamily, and small business sectors. Ratepayer-supported credit enhancements are made available to participating lenders offering financing for these programs. Credit enhancements provide additional security to participating lenders to mitigate loan defaults and provide more attractive borrowing terms for the customers.

The California Hub for Energy Efficiency (CHEEF) is administered by the California Alternative Energy and Advance Transportation Financing Authority (CAEATFA), a state agency in the California State Treasurer's Office. CAEATFA is responsible for designing and developing program regulations for the Financing Pilots through an existing public rulemaking process with support from the IOUs. The Residential program was the first pilot to launch in 2016 and was followed by the small business pilot and Multifamily pilots that launched in 2019.

D. 21-08-022 authorized CAEATFA to continue as the program administrator and for the IOUs to continue support of the program through 2027, with SoCalGas continuing as lead.

SoCalGas along with the other IOUs continued to support CAEATFA in the implementation and marketing of the financing programs. Decision 21-08-022 authorized incremental funding of \$8 million for Marketing, Education, and Outreach of financing programs. The programs are marketed under the brand GoGreen Financing and a complete website redesign launched in the 4<sup>th</sup> quarter of 2023.

## **Program Strategies & Outcomes**

SoCalGas relaunched financing energy-efficient measures through its online Marketplace in 2023. The Marketplace loans are limited to under \$5,000 with loan terms of 50 months at an interest rate of 9.99%. There have been approximately 1,000 loans disbursed for gas appliances with over half the loans going to customers with credit scores under 640.

The residential program, GoGreen Home, which offers residential customers unsecured loans up to \$50,000 for the installation of energy-efficient equipment, approached a \$100 million dollars milestone in loan originations and has enrolled close to 5,000 loans since program implementation. The program continues to reach underserved communities and more than 50% of the loans were made to properties in low to moderate income census tracts. The most commonly funded measures for the program have been HVAC, windows, and cool roofs. Customers can select repayment terms up to 15 years with the average interest rate around 5%.

In 2023, GoGreen Home had its strongest funding year in program history, funding over \$40 million in energy efficiency projects. The program has enrolled 8 participating lenders and over 800 contractors.

The GoGreen Business financing program launched in all IOU territories and offers small businesses the option to repay their loan directly on the utility bill. The program has enrolled close to 40 loans and financed over \$4 million in loan originations. The small business program has 128 participating contractors and 8 participating financing lenders. The most common measures financed through the program were lighting, refrigeration, and HVAC.

## **SCG3803 Finance – SW-California Hub for EE Financing**

### **Program Overview**

The California Hub for Energy Efficiency Financing (CHEEF) was established to design and implement new statewide financing pilots targeting single family residential, multifamily, and small businesses.

The CHEEF infrastructure coordinates the flow of third-party private capital to fund energy improvements, manage the availability of project, loan, and energy consumption data, and facilitate a streamlined process for program participants. Key components of the CHEEF infrastructure include a Master Servicer responsible for the day-to-day administrative operations of the program, a trustee bank responsible for holding and transferring ratepayer funds used for credit enhancements, a contractor manager that provides quality assurance and control (QA/QC) for finance-only projects, and data manager that will make anonymized and aggregated program data available to the public.

In D.13-09-044, the Commission requested the CAEATFA to take on the role as CHEEF manager. CAEATFA is responsible for administering the CHEEF which includes developing program regulations for the Financing Pilots through a public rulemaking process, operationalizing program processes and forms, and managing outreach efforts to both contractors and financial institutions. A contract was executed by the IOUs and CAEATFA in September 2014 with the most recent amendment executed in July 2022. SoCalGas is the lead utility for the

Financing Pilots Program and lead contract administrator for the CHEEF agreement. SoCalGas extended the CHEEF agreement through 2027 and administers monthly invoicing and reporting activities to the commission and IOUs.

In August 2021, the commission issued D.21-08-006 which restated the Commission's approval for CAEATFA to continue administering the pilots.

Moreover, the decision ordered the IOUs to provide up to an additional \$75.2 million in ratepayer funding to CAEAFTA for implementation of the programs through 2027. The decision authorized IOUs to request additional funding to support the programs through either utilization of unspent funds, Annual Budget Advice Letter (ABAL), submittal of Tier 2 Advice Letter, or through future business plan filings. SoCalGas's advice letter seeking approval to utilize unspent funds for program year 2022 to support CHEEF programs was accepted in October 2021. The IOU funds went toward supporting operational activities including marketing and designated SoCalGas to continue as the lead utility partner.

### **Program Strategies & Outcomes**

In 2023 the IOUs assisted CAEATFA in the marketing of the GoGreen Home, GoGreen Business, and GoGreen Multifamily. The IOUs utilized each organization's Trade Professional Networks to promote the Business and Multifamily programs and SoCalGas launched a Digital and Social media campaign that generated over 25 million total impressions.

SoCalGas is engaged in coordination meetings with CAEATA, Energy Division, the state-wide marketing implementer Riester, and facilitated meetings with the Finance leads from the other IOU's.

GoGreen Financing is the IOU co-branded website and contains lender, contractor, and partner information for customers to learn and apply for the loan programs. SoCalGas extended the CHEEF agreement through 2027 and administers monthly invoicing and reporting activities to the Commission and IOUs. Riester launched an updated GoGreen Financing website with a new look and feel, added more color, animation, and simplified messaging to provide a better user journey.

## **Public Sector Programs**

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### **SCG3912 Public – Regional Energy Pathways**

#### **Program Overview**

The Public Sector Regional Energy Pathways is a transition from the retired Local Government Partnership (LGP) model. To build on successes and lessons with the LGP model, SoCalGas updated the Public Sector partnering approach to ensure valuable programs and services for all Public Sector customers are provided. The objective of this model is to maintain support for local government partners along with all Public Sector customers to allow for more flexible engagement. SoCalGas believes the model demonstrates the value of regional partnering by maintaining direct relationships with existing partners and implementers while developing new relationships with public agencies.

Regional Energy Pathways is a non-resource program that is implemented by SoCalGas and external resources based throughout the service territory to expand knowledge of available EE.

#### **Program Strategies & Outcomes**

In 2023, SoCalGas's Public Sector Regional Energy Pathways program supported cities, counties, State of California Agencies including higher education and K-12. Through the Energy Pathways efforts, SoCalGas facilitated engagement between local EE third-party Implementers and Public Sector Customers which contributed to EE projects being completed in K-12 schools and local government facilities.

SoCalGas expanded its reach by enrolling ambassadors regionally to help bring EE program information to customers and increase participation in EE programs including the Public Sector Direct Install Program for Small-Medium customers and raising awareness of the Large Public Sector program. The newly enrolled Ambassadors include the South Bay Council of Governments, The Santa Maria Chamber of Commerce, The San Joaquin Valley Clean Energy Organization, and the Western Riverside County Council of Governments.

SoCalGas hosted the third annual K-12 EE Webinar which included participation from EE programs, equipment manufacturers. Program information was also provided on other programs offered by SoCalGas for K-12 customers. The Regional Pathways and the Region Ambassadors collaborated on identifying opportunities which resulted in projects for the Direct Install Program and for deemed rebates offered by SoCalGas. In addition, SoCalGas continued to support cities with their goals to reduce energy with providing data required to complete updated GHG inventories.

SoCalGas collaborated with the SoCalREN to jointly support public sector customers to maximize benefits. SoCalGas provided data to customers working with the SoCal REN, IREN, and 3C REN as requested.

The program met its objective to enroll Ambassadors to extend their reach to customers and help connect them with multiple programs as well as incentive and finance offerings. In 2024 SoCalGas will continue evaluating ways to improve connecting customers with EE solutions.

## **SCG3886 Public – Public Direct Install Program**

### **Program Overview**

The SoCalGas Public Direct Install Program (PDIP) is a turnkey cost-effective end-to-end solution for SoCalGas that serves very small, 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.

### **Program Strategies & Outcomes**

SoCalGas and the implementer collaborated throughout 2023 to discuss marketing, inspections, production, invoicing, and program strategies. The collaboration led to a successful program implementation in 2023.

The public market segment began to show signs of saturation with the program measure mix in 2023. However, the implementer provided tier 1 program services to many public facilities including LA and Riverside Counties that are expected to be revisited in 2024 for additional offerings.

The implementer has experienced challenges in delivering the installation of Tier 2 energy efficiency technologies due to intricacies in the decision-making process within customer portfolios. Synergy began providing a more comprehensive ASHRAE level one audit to increase the appeal to customers. Even with challenges, the program performed with a suitable net cost per therm. The program's net cost per therm was less than 50% of anticipated cost.

Solar thermal water heaters and patio heating measures will be introduced to the program in 2024. We expected that with a more robust measure mix, and an emphasis on expanding program participation as well as new partnerships within the community there will be an increase in participation of Tier 2 energy efficiency technologies.

## **SCG3899 Public Large Public Sector Program**

### **Program Overview**

The Large Public Sector Program (LPS) serves large public sector customer segments located in SoCalGas territory: Local Government, Federal Government, K-12 Education, Special Districts, and Public Owned Utilities. The program offers energy efficiency solutions tailored to large public sector customers, including those serving HTR and DAC segments. It identifies and manages project opportunities that utilize the deemed, custom, and NMEC measurement platforms.

## **Program Strategies & Outcomes**

The program successfully developed marketing materials, deemed and custom incentive applications, fact sheets, and website presence for the LPS program.

A primary focus in 2023 was building relationships with large public sector customers including outreach to all twelve counties within SoCalGas territory. Additionally, cities and municipal governments with population exceeding 100,000 were identified and contacted. Energy Infrastructure Partner ( EIP )reached out to school districts and presented the LPS program along with its deliverables.

EIP participated in the custom engineering workshop organized by SoCalGas for all implementors to gain insights into custom projects, the filing and reporting process, and the various steps involved in submitting proper supporting documents for custom process review.

In addition to program launch activities, EIP met the following objectives:

- Audited and assessed approximately 30 sites;
- Developed a robust project pipeline for 2024 and beyond;
- Revised measure list for eligible sites;
- Successfully engaged stakeholders, reaching out to more than 700 customers for comprehensive briefings detailing program offerings and benefits; and
- Conducted presentations for approximately 70 customers, either virtually or in person, providing insights, identifying energy-efficient measures, and achieving substantial energy savings.

For 2024, the EIP team is committed to maintaining a primary focus on outreach efforts and collaborating closely with SoCalGas to identify and target the appropriate large public customers.

## **Energy Atlas**

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The Energy Atlas is a tool or database of building energy consumption that links utility account information to building characteristics, socio-demographic data, and other significant attributes that can be expressed spatially. The public portion of the Energy Atlas is a front-end website which displays spatially aggregated energy consumption statistics at an annual temporal resolution for most neighborhoods, cities, and counties in Southern California.

In D.18-05-041, the Commission directed the IOU Program Administrators, under the leadership of SCE, to oversee the statewide deployment of a tool akin to the Energy Atlas, the California

Analysis Tool for Locational Energy Assessment (CATALENA). The program's goal originally included the Commission's direction to competitively solicit a third-party to implement CATALENA's deployment, maintain its data quality, consistency, and security, and continue development of the Energy Atlas's capabilities. D.18-05-041 also directed the IOU PAs to:

- Allocate up to \$2 million to CATALENA
- Include annual management and maintenance costs for CATALENA in their annual budget advice letters, in proportion to their relevant energy efficiency programs.

### **2023 Developments**

On February 3, 2023, the CPUC issued D.23-02-002. The Decision Addressing Energy Efficiency Third-Party Processes and Other Issues indicates the Commission's intent to seek a memorandum of understanding with the CEC to implement CATALENA. The Decision also "directs the IOUs to allocate \$2 million specified in D.18-05-041 to a new accounting mechanism (e.g., a balancing account or sub-balancing account) for the purpose of transferring those funds to the CEC to develop and maintain the tool."<sup>6</sup>

As part of the Decision, COL 27 indicates the Commission's intent to seek a memorandum of understanding with the CEC for the CEC to implement CATALENA. OP 16 of the Decision orders that, within 60 days of the issuance of the decision, the IOUs must submit a tier 1 AL "to fund and facilitate implementation of the California Analysis Tool for Locational Energy Assessment project in accordance with Section 5 of this decision."

On April 3, 2023, PG&E submitted a joint Tier 1 advice letter on behalf of PG&E, SDG&E, SCG, and SCE to document the process for jointly funding CATALENA.<sup>7</sup> The Advice Letter was subsequently approved by Disposition on May 5, 2023.

SoCalGas continues to collaborate with a working group of IOU, REN, and Commission representatives to develop CATALENA.

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<sup>6</sup> D.23-02-002 at 80

<sup>7</sup> *Id.* at 60.



## **APPENDIX A – SoCalGas PORTFOLIO SUPPORTING DATA**

Please review the file: “SoCalGas 2023 Annual Report Template,” uploaded to the CEDARS website (<https://cedars.sound-data.com/documents/standalone/list/>), to view 2023 Supporting Data including the following tables:

<b>Tab</b>	<b>Content</b>
<b>T-1 Savings&amp;Goals</b>	Net First Year Savings, Goal Attainment and Fuel Sub Load Reduction Adjustments
<b>T-2 Fuel Sub</b>	Fuel Substitution Savings
<b>T-3 EnvImpacts</b>	Environmental Impacts of EE Portfolio by Measure Use Category
<b>T-4 Program Data</b>	EE Programs
<b>T-5 Segment Summary</b>	Savings By Sector and Segment
<b>T-6 Bill Impacts</b>	Average Billpayer Impacts from Net Savings
<b>T-7 SavingsUseCategory</b>	Annual Savings By Use Category
<b>T-8 Commitments</b>	Funding commitments
<b>T-9 Cap &amp; Target</b>	Energy Efficiency Quarterly Cap And Target Expenditure Performance
<b>T-10 BP Metrics</b>	Business Plan Metrics
<b>T-11 3P Calculation</b>	Third-Party Calculations
<b>T-12 3P Contract Info</b>	Third Party Contract Details
<b>T-13 PG&amp;E Marketplace Metrics</b>	PG&E Marketplace Metrics [Not Applicable to SoCalGas]

## **APPENDIX B.1 – UPDATED MONTHLY REPORT**

The Updated SW Monthly Report can be found on the CEDARS website:

<https://cedars.sound-data.com/monthly-reports/statewide/confirmed-dashboard/>

The Updated Local Monthly Report can be found on the CEDARS website:

<https://cedars.sound-data.com/monthly-reports/all-pas-dashboard/>

## **APPENDIX B.2 – UPDATED QUARTERLY REPORT**

The Updated Quarterly SW Report can be found on the CPUC's energy efficiency reports website:

<https://cedars.sound-data.com/claims/confirmed-dashboard/2023/>

The Updated Quarterly Local Report can be found on the CPUC's energy efficiency reports website:

<https://cedars.sound-data.com/claims/confirmed-dashboard/2023/>

## **APPENDIX C – THIRD-PARTY SOLICITATIONS INFORMATION**

See tab T-13 3P Calculation as referenced above for information regarding SoCalGas’s third-party programs budget and contract information.

Compliance with D.18-05-041

- Program administrators must also assess the relative success of implementers’ strategies, for purposes of identifying lessons learned and best practices for maximizing the contribution of energy efficiency in disadvantaged communities. These assessments shall be included in the program administrators’ annual reports. (OP 11, p. 184).
  - In 2023, SoCalGas met the 60% third-party program percentage requirement. Key performance index and new insights are included in the 2023 Annual Report filing.
- Investor owned utilities must track the number and proportion of third parties that forego the option of using utility account representatives. The utilities must include this information in their annual reports. (OP 17, p. 185)
  - All third-party programs that target customers with SoCalGas account representatives are provided with basic support that includes providing general information of relevant energy efficiency programs, referring program- related inquiries to respective implementers, and coordinate with implementers to address basic customer questions and concerns. By year-end 2023, ten implementers have chosen to utilize SoCalGas account representatives that go beyond the basic support described.

## **APPENDIX D – METRICS**

Appendix D – Metrics; see tab T-10 BP Metrics as referenced above.

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## APPENDIX E – Amended STATEWIDE TRUE-UP REPORT

Per Advice Letter 3268-E-A/2701-G-A, the annual true-up, which provides each IOUs status of statewide program payments, expenses and related interest for the programs administered is included below.

### SoCalGas | Statewide EE Programs, 2023 – As Filed

YE True-Up Reports, Refund Summary

Program	SDG&E	SCG	SCE	PG&E	Total
SW Gas Emerging Technology	\$168,938.00	\$985,590.83	\$0.00	\$1,234,691.04	\$2,389,219.86
SW Food Services	\$119,736.58	\$635,453.07	\$176,521.13	\$528,245.58	\$1,459,956.36
SW Water Heating	\$222,172.77	(\$735,501.84)	(\$470,000.71)	(\$1,406,451.19)	(\$2,389,780.97)
<b>Total Refund/(Amount due to SCG):</b>	<b>\$510,847.34</b>	<b>\$885,542.06</b>	<b>(\$293,479.58)</b>	<b>\$356,485.43</b>	<b>\$1,459,395.25</b>

### SoCalGas | Statewide EE Programs 2023 - AMENDED

YE True-Up Reports, Refund Summary

Program	SDG&E	SCG	SCE	PG&E	Total
SW Gas Emerging Technology	166,806.96	954,724.47	0.00	1,220,921.25	2,342,452.68
SW Food Services	125,720.74	280,012.69	185,343.34	554,646.24	1,145,723.01
SW Water Heating	(336,897.43)	(791,551.16)	(496,697.37)	(1,486,341.43)	(3,111,487.39)
<b>Total Refund/(Amount due to SCG):</b>	<b>(44,369.74)</b>	<b>443,186.00</b>	<b>(311,354.03)</b>	<b>289,226.06</b>	<b>376,688.30</b>

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**SW Gas Emerging Technology 2023 – As Filed**

	<b>SDG&amp;E</b>	<b>SCG</b>	<b>SCE</b>	<b>PG&amp;E</b>	<b>Total</b>
Proportional Contribution per Load-Share	7.80%	41.80%	0.00%	50.40%	100.00%
Total Monthly Payments made	\$338,502.48	\$1,814,026.32	\$0.00	\$2,187,246.40	\$4,339,775.20
Total Interest Payment Accrued	\$8,884.36	\$47,611.04	\$0.00	\$57,406.61	\$113,902.00
Program Costs actually spent	\$178,448.84	\$876,046.53	\$0.00	\$1,009,961.97	\$2,064,457.34
Annual True-Up Payment accrued	\$168,938.00	\$985,590.83	\$0.00	\$1,234,691.04	\$2,389,219.86

**SW Gas Emerging Technology 2023 - AMENDED**

	<b>SDG&amp;E</b>	<b>SCG</b>	<b>SCE</b>	<b>PG&amp;E</b>	<b>Total</b>
Proportional Contribution per Load- Share	7.80%	41.80%	0.00%	50.40%	100.00%
Total Monthly Payments made	\$338,502.48	\$1,814,026.32	\$0.00	\$2,187,246.40	\$4,339,775.20
Total Interest Payment Accrued	\$6,753.32	\$36,190.86	\$0.00	\$43,636.82	\$86,581.00
Program Costs actually spent	\$178,448.84	\$895,492.71	\$0.00	\$1,009,961.97	\$2,083,903.52
Annual True-Up Payment accrued	<b>\$166,806.96</b>	<b>\$954,724.47</b>	<b>\$0.00</b>	<b>\$1,220,921.25</b>	<b>\$2,342,452.68</b>

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**SW Food Services 2023 – As Filed**

	<b>SDG&amp;E</b>	<b>SCG</b>	<b>SCE</b>	<b>PG&amp;E</b>	<b>Total</b>
Proportional Contribution per Load-Share	10.88%	25.08%	16.04%	48.00%	100.00%
Total Monthly Payments made	\$1,995,743.54	\$4,600,480.80	\$2,942,253.00	\$8,804,748.60	\$18,343,225.94
Total Interest Payment Accrued	\$16,393.88	\$37,790.29	\$24,168.91	\$72,325.92	\$150,679.00
Program Costs actually spent	\$1,892,400.84	\$4,002,818.02	\$2,789,900.78	\$8,348,828.94	\$17,033,948.58
Annual True-Up Payment accrued	\$119,736.58	\$635,453.07	\$176,521.13	\$528,245.58	\$1,459,956.36

**SW Food Services 2023- AMENDED**

	<b>SDG&amp;E</b>	<b>SCG</b>	<b>SCE</b>	<b>PG&amp;E</b>	<b>Total</b>
Proportional Contribution per Load-Share	10.88%	25.08%	16.04%	48.00%	100.00%
Total Monthly Payments made	\$1,995,743.54	\$4,600,480.80	\$2,942,253.00	\$8,804,748.60	\$18,343,225.94
Total Interest Payment Accrued	\$22,233.72	\$51,251.98	\$32,778.38	\$98,089.92	\$150,679.00
Program Costs actually spent	\$1,892,256.52	\$4,371,720.09	\$2,789,688.04	\$8,348,192.28	\$17,033,948.58
Annual True-Up Payment accrued	<b>\$125,720.74</b>	<b>\$280,012.69</b>	<b>\$185,343.34</b>	<b>\$554,646.24</b>	<b>\$1,145,723.01</b>



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**SW Water Heating 2023 As Filed**

	<b>SDG&amp;E</b>	<b>SCG</b>	<b>SCE</b>	<b>PG&amp;E</b>	<b>Total</b>
Proportional Contribution per Load-Share	10.88%	25.08%	16.04%	48.00%	100.00%
Total Monthly Payments made	\$1,877,066.76	\$4,326,915.00	\$2,767,293.36	\$8,281,176.96	\$17,252,452.09
Total Interest Payment Accrued	\$34,126.86	\$78,667.43	\$50,312.03	\$150,559.68	\$313,666.00
Program Costs actually spent	\$1,689,025.85	\$5,141,084.27	\$3,287,606.10	\$9,838,187.83	\$19,955,899.05
Annual True-Up Payment accrued	\$222,172.77	(\$735,501.84)	(\$470,000.71)	(\$1,406,451.19)	(\$2,389,780.97)

**SW Water Heating 2023 - AMENDED**

	<b>SDG&amp;E</b>	<b>SCG</b>	<b>SCE</b>	<b>PG&amp;E</b>	<b>Total</b>
Proportional Contribution per Load-Share	10.88%	25.08%	16.04%	48.00%	100.00%
Total Monthly Payments made	\$1,877,066.76	\$4,326,915.00	\$2,767,293.36	\$8,281,176.96	\$17,252,452.08
Total Interest Payment Accrued	\$16,135.91	\$37,195.65	\$23,788.60	\$71,187.84	\$148,308.00
Program Costs actually spent	\$2,230,100.10	\$5,155,661.81	\$3,287,779.33	\$9,838,706.23	\$20,512,247.47
Annual True-Up Payment accrued	(\$336,897.43)	(\$791,551.16)	(\$496,697.37)	(\$1,486,341.43)	(\$3,111,487.39)

## **APPENDIX F – 2024 JOINT COOPERATION MEMORANDUMS**

Per Decision D.23-06-055, Ordering Paragraph 35, Portfolio Administrators must submit Joint Cooperation Memorandums every two years, within 60 days after Commission approval of the last of each JCM's portfolio administrator's true-up advice letters and mid-cycle advice letters (as applicable). Joint 2024 JCMs have been uploaded to the California Energy Data and Reporting System.