

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

Application of Pacific Gas and Electric
Company for Approval of Energy Savings
Assistance and California Alternate Rates for
Energy Programs and Budgets for 2021-2026
Program Years (U39M)

Application 19-11-003
(Filed November 4, 2019)

And Related Matters.

Application 19-11-004
Application 19-11-005
Application 19-11-006
Application 19-11-007

**AMENDED ANNUAL REPORT OF SOUTHERN CALIFORNIA GAS
COMPANY (U 904 G) ON LOW INCOME ASSISTANCE PROGRAMS
FOR PROGRAM YEAR 2025**

[PUBLIC VERSION]

ISMAEL BAUTISTA, JR.

Attorney for:

SOUTHERN CALIFORNIA GAS COMPANY

555 W. 5th Street, GT14G1

Los Angeles, CA 90013

Telephone: (213) 231-5978

E-Mail: ibautista@socalgas.com

Date: June 26, 2026

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

Application of Pacific Gas and Electric
Company for Approval of Energy Savings
Assistance and California Alternate Rates for
Energy Programs and Budgets for 2021-2026
Program Years (U39M)

And Related Matters.

Application 19-11-003
(Filed November 4, 2019)

Application 19-11-004
Application 19-11-005
Application 19-11-006
Application 19-11-007

**AMENDED ANNUAL REPORT OF SOUTHERN CALIFORNIA GAS
COMPANY (U 904 G) ON LOW INCOME ASSISTANCE PROGRAMS
FOR PROGRAM YEAR 2025
[PUBLIC VERSION]**

This report represents the amended results and expenditures for Southern California Gas Company's (SoCalGas) California Alternate Rates for Energy (CARE) Program and Energy Savings Assistance (ESA) Program for Program Year (PY) 2025. The purpose of this report is to consolidate activity for the CARE and ESA Programs and provide the California Public Utilities Commission's (Commission or CPUC) Energy Division (ED) with all the necessary information to analyze SoCalGas's low-income programs. Amended content throughout the report is noted in red font and underlined.

Respectfully Submitted
on behalf of Southern California Gas Company,

By: _____ /s/ Ismael Bautista, Jr.

ISMAEL BAUTISTA, JR.

Attorney for:

SOUTHERN CALIFORNIA GAS COMPANY

555 W. 5th Street, GT14G1

Los Angeles, CA 90013

Telephone: (213) 231-5978

E-Mail: ibautista@socalgas.com

Date: June 26, 2026



Energy Savings Assistance Program
and
California Alternate Rates for Energy Program
Annual Report

2025 Amended Results

June 26, 2026

ESA PROGRAM AND CARE ANNUAL REPORT

TABLE OF CONTENTS

Title	Page
1. ESA PROGRAM EXECUTIVE SUMMARY	2
1.1 <i>ESA Program Overview.....</i>	6
1.2 <i>Marketing, Education and Outreach</i>	14
1.3 <i>Energy Savings Assistance Program Customer Enrollment.....</i>	32
1.4 <i>Disability Enrollment Efforts.....</i>	36
1.5 <i>Leveraging Success Including LIHEAP.....</i>	40
1.6 <i>Integration Success</i>	46
1.7 <i>Workforce Education & Training.....</i>	55
1.8 <i>Studies.....</i>	61
1.9 <i>Pilots</i>	68
1.10 <i>ESA Working Group (WG) and Sub-working Groups (SWG)</i>	70
1.11 <i>Annual Public ESA Program and CARE Meeting</i>	75
1.12 <i>Multifamily Properties.....</i>	75
2. CARE EXECUTIVE SUMMARY	93
2.1 <i>Participant Information</i>	98
2.2 <i>CARE Program Summary.....</i>	104
2.3 <i>CARE Program Costs</i>	105
2.4 <i>Marketing, Education and Outreach (ME&O).....</i>	110
2.5 <i>Processing CARE Applications.....</i>	145
2.6 <i>Program Management</i>	149
2.7 <i>Pilots</i>	149
2.8 <i>Studies.....</i>	150
2.9 <i>CARE Working Groups and Sub-working Groups (SWG) CARE/FERA PEV SWG</i>	153
2.10 <i>Miscellaneous</i>	155
3. CARE EXPANSION PROGRAM	158
3.1 <i>Participant Information</i>	158
3.2 <i>Usage Information</i>	158
3.3 <i>Program Costs</i>	158
3.4 <i>Outreach</i>	159
3.5 <i>Program Management</i>	162

4.	FUND SHIFTING.....	162
4.1	<i>Report Energy Savings Assistance Program fund shifting activity that falls within rules laid out in Section 10.5.8.2 of D.21-06-015.....</i>	<i>162</i>
4.2	<i>Report CARE fund shifting activity that falls within rules laid out in Section 10.5.8.2 of D.21-06-015.....</i>	<i>162</i>
4.3	<i>Was there any Energy Savings Assistance Programs or CARE fund shifting activity that occurred that falls OUTSIDE the rules laid out in Section 10.5.8.2 of D. 21-06-015?</i>	<i>163</i>
5.	COMMONLY USED ACRONYMS	163
6.	APPENDIX A: COLLATERAL MATERIALS	166
6.1	<i>ESA Program Tables.....</i>	<i>166</i>
6.2	<i>CARE Tables.....</i>	<i>167</i>
6.3	<i>Tribal Outreach Contacts</i>	<i>168</i>

ENERGY SAVINGS ASSISTANCE (ESA) PROGRAM ANNUAL REPORT

1. ESA PROGRAM EXECUTIVE SUMMARY

For many income-qualified households across Southern California, affordability is not an abstract concept: it is the daily reality of rising essentials, limited time, and deferred home repairs. The ESA Program exists for that reality: delivering no-cost, professionally installed improvements that reduce energy use, help stabilize bills over time, and improve health, comfort, and safety (HCS) where home conditions require urgent attention. [This Amended Annual Report presents the total achievements and expenditures for SoCalGas's ESA Program for PY 2025.](#)

SoCalGas's ESA Program provides no cost energy saving home improvements, efficient natural gas appliances, and in-home energy education to qualified low-income customers throughout the service territory. These offerings help reduce household energy use, support customer affordability, and contribute to HCS. This [Amended](#) Annual Report presents [the](#) ESA Program achievements and expenditures for PY 2025, [including all completed and invoiced work from committed funds \(representing households enrolled during PY 2025 and treated during the period from January 1 through March 27, 2026\).](#)

PY 2025 occurred in a challenging operating environment for income-qualified customers, with continued affordability stress and limited ability to invest in home upgrades that reduce ongoing energy costs. At the same time, ESA is a program delivered through people: outreach staff, contractors, inspectors, and scheduled visits into customers' homes, and therefore is sensitive to shifts in community conditions, customer trust, and contractor labor and supply-chain constraints. In 2025, SoCalGas continued serving hard-to-reach customers while navigating cost

pressures and market dynamics that affected production and delivery, including tariff-related cost uncertainty and evolving immigration policies that influenced customer willingness to engage. These factors increased the importance of program management: aligning outreach strategies, reinforcing delivery priorities with contractors, preserving safety and quality, and maintaining stewardship within authorized budgets.

Despite these headwinds, the ESA Program delivered strong results in 2025, sustaining the therm-savings focused design implemented earlier in the current cycle. [For PY 2025](#), the ESA portfolio achieved approximately 1.58 million therms saved, exceeding the annual portfolio therm savings goal and demonstrating goal-exceeding therm performance for the second consecutive year. Average savings were approximately 26 therms per household served.

These savings translate into meaningful affordability outcomes for participating households. The average per-home lifecycle bill savings for the PY 2025 ESA Program was [\\$443](#). For households living close to the margin, sustained savings matter because they lower the baseline cost of keeping a home functional and safe.

The above challenges were addressed through adjustments to outreach messaging and an increased emphasis on trusted, utility-authorized contractor communications and digital engagement channels. In response to broader cost pressures affecting program delivery, SoCalGas also evaluated contractor compensation and, where feasible, made adjustments to account for changing economic conditions, including rising costs and tariff-related impacts in 2025, to support continued contractor participation and service continuity. At the same time,

improvements to outreach and enrollment systems enabled more effective tracking and reporting of outreach activities, allowing SoCalGas to assess program reach and make data-informed adjustments to improve delivery effectiveness.

Energy savings have been achieved alongside an expanded delivery of essential HCS measures, reflecting a balanced program delivery approach. At the same time, SoCalGas reinforced energy savings-focused delivery expectations with contractors by encouraging more comprehensive home assessments and prioritization of measures with higher therm-savings potential, including appliance services, attic insulation, and other feasible measures.

In support of this balanced approach, at the beginning of the program cycle, SoCalGas observed a decline in furnace repair and replacement activities under the HCS measures, which limited the ESA Program's ability to address certain customer health and safety needs. Following the July 2024 adjustment that removed certain negative-therm HCS measures from therm-savings accounting¹, the program provided increased flexibility for contractors to focus on essential safety-related activities based on household conditions throughout 2025. As a result, the ESA Program delivered 8,305 of these HCS measures to households in 2025, representing a 572 percent increase in heaters serviced compared to 2024. These interventions directly supported customer health and safety by restoring and maintaining dependable heat, while preserving overall alignment with program energy-savings objectives.

¹ These measures are Furnace Repair/Replacement and Furnace Clean and Tune. These measures had negative therm savings that were counterproductive in achieving therm savings goals, but important to the health, comfort, and safety of eligible customers.

Outside of core single-family delivery, participation and completed work within the Southern Multifamily Whole Building (MFWB) program continued to fall short of the sub-program's treatment and energy savings goals. Completed work however, increased by more than 60 percent compared to 2024, reflecting progress in a segment that has presented challenges under the current third party implemented program structure. Participation in the ESA Program Pilot Plus/Deep also increased by more than 400 percent compared to 2024, reflecting improvements to customer targeting, contractor support, and administrative processes as the pilot framework matured, but also falling short of their savings targets.

Comparatively, the Main ESA Program continued to thrive for a second straight year under SoCalGas's locally administered model, once again exceeding its therm savings goals. This performance reflects the program's ability to respond to affordability pressures by coordinating ESA and CARE enrollment efforts, expanding targeted marketing, education, and outreach (ME&O) activities—including direct mail, digital channels, and community partnerships. The program also provided in-home energy education and refined customer targeting to focus on income-qualified households most in need of bill relief. While both MFWB and ESA Whole Home showed measurable improvement, this comparison highlights therm savings and treatment outcomes have remained meaningfully stronger under the SoCalGas-administered ESA Main Program, and expenditures remained consistent within authorized levels. For PY 2025, the Main ESA Program spent over 90 percent of its authorized budget, reflecting steady implementation and continued focus on cost-effective use of ratepayer funds.

Overall, PY 2025 reflects sustained program performance, continued operational stability, and meaningful energy and non-energy benefits for income qualified customers. SoCalGas continues to refine ESA Program delivery strategies based on stakeholder feedback, program experience and data insights, supporting a flexible, reliable, and responsive program. PY 2025 results demonstrate compliance with Decision (D.) 21-06-015 and continued progress toward long-term energy-savings and customer-assistance objectives.

1.1 ESA Program Overview

Building on the success achieved in 2024, SoCalGas continued to leverage its experienced ESA Program contractor network in PY 2025 to deliver a therm savings-focused program. Following the successful validation of program enhancement implemented earlier in the current program cycle—including refinements to contractor compensation structures (emphasizing therm savings over treatment targets), outreach and enrollment practices (focusing on homes with higher energy usage), and the prior use of performance-based incentives (PBI)² to support the transition from a treatment based delivery model to one focused on therm savings—the program design entered PY 2025 in a stable and mature operating state. As a result, the contractor network remained well positioned to execute reliably under the current program design.

² PBIs were discontinued in PY 2025 after serving as a transitional tool to support contractor alignment with therm savings objectives. The ESA Program achieved its therm savings goal in PY 2024 following implementation of PBIs and continued to meet therm savings expectations under the established program design.

Twelve weatherization contractors continued refining program delivery in PY 2025, while addressing cost pressures, including the introduction of new tariff considerations, and maintaining alignment with the program’s energy savings objectives and budgetary parameters. No new measures were introduced in 2025, allowing contractors to build on effective measure offerings and sustain efficient delivery. All existing measures continued to be assessed for feasibility and energy savings potential through established outreach, assessment, and installation processes, supporting an effectively implemented ESA Program delivery framework. This steady approach was a complete pivot from prior statewide ESA Program cycle goals³, which resulted in SoCalGas surpassing its therm savings goal while remaining within its authorized budget for a second consecutive year, reaffirming the effectiveness of the refined program delivery framework.

ESA Program Measure Categories and Measures Delivered	
Category	Measures
Appliances	High-Efficiency Clothes Washers
Domestic Hot Water Measures	Tankless Water Heaters
	Water Heater Repair or Replacement
	Water Heater Tank and Pipe Insulation
	Faucet Aerator
	Low-Flow Showerheads
	Thermostatic Shower Valves
	Tub Diverters
Enclosure Measures	Attic Insulation Improvements
	Envelope and Air Sealing measures
Heating Measures	Smart Fan Controllers
	Smart Thermostats
	Furnace Repair or Replacement
	Duct Sealing Weatherization
Maintenance Measures	Furnace Clean and Tune
In-Home Energy Education	In-Home Energy Education

³ The prior program cycle (D.16-11-022, as modified by D.17-12-009) measured performance based on homes treated, prior to the adoption of therm-savings-based goals.

SoCalGas provided and/or serviced 26,506 total appliances, including 14,681 water heaters, 9,616 furnaces, and 2,209 HE clothes washers. The average per home lifecycle bill savings for the PY 2025 ESA Program was \$443 sustaining success in this area since PY2023 (a 61% increase compared to 2023).

1.1.1 Provide a summary of the Energy Savings Assistance Program elements as approved in D.21-06-015:

Main ESA Program

2025 Main ESA Program Summary ⁴			
	Authorized Budget/ Planning Assumptions*	Actual	%
Budget	\$95,388,391	\$ <u>88,447,808</u>	<u>93%</u>
Administrative Costs ⁵	\$12,538,096	\$ <u>9,032,202</u>	<u>72%</u>
Homes Treated	69,837	<u>45,535</u>	<u>65%</u>
Therms Saved	1,435,220**	1, <u>162,289</u>	<u>81%</u>
GHG Emissions Reduced (Tons)***	7,594	<u>6,160</u>	<u>81%</u>

* Authorized funding and homes treated goals per D.21-06-015. Authorized budget does not include unspent funds carried over from prior cycles, per D. 19-06-033.

** Per D.21-06-015, authorized therms saved goal of 1,435,220 is for the *entire* ESA Program portfolio, including main ESA Program (SF) and MFWB, with the singular exception of the Staff Proposal pilot. However, the actual-to-date therm count in this table does not include therm savings contributions from MFWB. See next table, Program Summary for 2024 ESA Program Southern MFWB.

*** GHG Emissions Reduced calculated using EPA Greenhouse Gas Equivalencies Calculator.

⁴ Includes Single Family (SF) and Mobile Home (MH) treatments for PY 2025. D.21-06-015 permits IOUs to carry forward funds for committed work started in 2025 but finished in 2026. SoCalGas allowed its main ESA Program contractors to complete and invoice such committed work by March 27, 2026 (the committed funds period).

⁵ Page 316 of D.21-06-015 states, “We approve a cap on administrative expenses for the ESA Program at either 10 percent of total program costs, or the IOU’s historical five-year average spend on administrative costs as a percentage of total program costs, whichever is greater. We phase out the use of the historical five-year average spend such that the IOUs must propose to spend no more than 10 percent of total program costs on administrative costs starting in program year 2024.”

In 2025, SoCalGas administered the ESA Main Program within the cost parameters outlined in D.21-06-015⁶ in the fourth full year of the 2021-2026 program cycle, spending 93% of its authorized budget in 2025. The administrative budget cap of 10% of the authorized budget “expenses” was \$9,032,202 with SoCalGas successfully in 2025 remaining below this cap at 8.7% towards administrative costs.

The Main ESA Program treated a total of 45,535 homes in 2025 and achieved 1,162,289 therms in savings. Measures installed through SoCalGas’s MFWB South effort delivered an additional 416,576 therms saved, accounting for 29% of the total annual them savings goal as of December 31, 2025. Collectively, the Main ESA Program and MFWB have achieved approximately 1.58 million therms in savings as of December 31, 2025, exceeding the annual therm savings goal of 1.44 million therms. SoCalGas achieved its therm savings goal while staying within both its administrative and overall budget caps. This information reflects the committed-funds process being completed. D.21-06-015 permits IOUs to carry forward funds for committed work started in 2025, but finished in 2026. SoCalGas arranged for its Main ESA Program contractors to complete and invoice such committed work by March 27, 2026 (the committed funds period).

In terms of measures, the Smart Fan Controller continued to be one of SoCalGas’s most impactful measures in 2025, with nearly 11,000 installations, saving over 300,000 therms, and representing 26% of total therm savings. Tankless water heater impact was

⁶ See D.21-06-0-15, Attachment 1 Table 10: ESA Program Approved Budgets (SoCalGas).

also significant, with 1,926 installations, saving 171,816 therms, and contributing over 15% of total therm savings. Together, these measures generated over 40% of all therm savings.

Also continuing to perform well in 2025, Prescriptive Duct Sealing remained the leading infiltration-related therm saving measure installed, providing 184,459 therms and about 16% of total program savings. SoCalGas completed over 2,200 HE Clothes Washer installations in 2025, reflecting steady performance as supply conditions normalized.

Additionally, SoCalGas tracked customer experience in 2025 through a quarterly customer satisfaction survey, with annual results showing clear improvement relative to 2024. Across PY 2025, 48% of customers rated the overall quality of service received through the SoCalGas ESA Program as “excellent⁷,” representing a 7% increase compared to 2024. The customer experience during enrollment also improved year over year, with 61% of customers rating the Overall Quality of Sign Up as “excellent,” an 8% improvement from 2024.

The customer satisfaction survey evaluates service quality across enrollment, installation (service quality and materials), and inspection visits, and provides actionable insight to support ongoing program management and continuous improvement. Sustained and

⁷ The Southern California Gas Company (SCG) -- Energy Savings Assistance Program (ESAP) Customer Satisfaction Survey - #4754th Quarter 2025 has a satisfaction rating ranging from 1 to 5, including 1) Poor 2) Fair 3) Good 4) Very Good 5) Excellent with 1 being the lowest rating and 5 being the highest rating.

improving customer satisfaction remains an integral component of the continued success of the SoCalGas ESA Program.

2025 MFWB Southern Program Summary SoCalGas			
	Authorized Budget/ Planning Assumptions*	Actual	%
Budget	\$20,649,505	\$13,637,142	71%
Administrative Costs	\$2,394,924	\$1,448,588	60%
Multifamily WB Properties Treated	126	57	45%
Multifamily Tenant Units w/in Properties Treated	21,269	10,202	48%
kWh Saved	N/A	N/A	N/A
Therms Saved	650,523	416,576	64%
GHG Emissions Reduced (Tons)	3,442	2,204	64%

* Per D.21-06-015

2025 MFWB Southern Program Aggregate Summary			
	Authorized Budget/ Planning Assumptions*	Actual**	%
Budget	\$47,662,229	-	-
Administrative Costs	\$4,489,523	-	-
Multifamily WB Properties Treated	260	-	-
Multifamily Tenant Units w/in Properties Treated	46,783	-	-
kWh Saved	11,834,944	-	-
Therms Saved	723,721	-	-
GHG Emissions Reduced (Tons)	3,829	-	-

* Per D.21-06-015

** Table is left blank intentionally. This data is reported by the Southern MFWB lead SDG&E in their 2025 Low Income Annual Report.

Pilot Plus/Deep

2025 ESA Program Pilot Plus/Deep Summary SoCalGas			
	Authorized Budget/ Planning Assumptions*	Actual	%
Budget	\$6,510,545	\$182,706	2.8%
Administrative Costs ⁸	\$651,054	\$66,057	10.1%
Homes Treated	N/A	115	N/A
kWh Saved (Plus = 1-15 Percent)	N/A	N/A	N/A
kWh Saved (Deep = 15-50 Percent)	N/A	N/A	N/A
kW Demand Reduced	N/A	N/A	N/A
Therms Saved (Plus = 5-15 Percent)	N/A	875	N/A
Therms Saved (Deep = 15-50 Percent)	N/A	7,179	N/A
GHG Emissions Reduced (Tons)	N/A	42.7	N/A

* Per D.21-06-015.

** Includes expenses recorded in SoCalGas SAP.

2025 ESA Program Pilot Plus/Deep Summary SoCalGas and SCE			
	Authorized Budget/ Planning Assumptions*	Actual**	%
Budget	\$3,884,864	\$3,631,633	93%
Administrative Costs ⁹	\$388,486	\$440,726	113%
Homes Treated	400	142	36%
kWh Saved (Plus = 1-15 Percent)	N/A	18,728	N/A
kWh Saved (Deep = 15-50 Percent)	N/A	454,136	N/A
kW Demand Reduced	N/A	32	N/A
Therms Saved (Plus = 5-15 Percent)	N/A	974	N/A
Therms Saved (Deep = 15-50 Percent)	N/A	9,005	N/A
GHG Emissions Reduced (Tons)	N/A	48	N/A

* Per D.21-06-015

** Provided by SCE. Includes expenses not recorded by SoCalGas in SAP.

† Therm savings differ between the joint Pilot Plus/Deep results and SoCalGas stand-alone reporting because consolidated results include electric measures that yield negative therm savings, whereas SoCalGas results reflect gas-attributable therm savings only.

⁸ Attachment 2 of D.21.06-015 states, “General Administration – Funds may be allocated for administration of the pilot, not to exceed 10 percent of the pilot budget.

⁹ *Id.*

In D.21-06-015, the Commission approved a pilot-based redesign of the ESA Program, guided by recommendations from the ED. The restructured initiative, referred to as ESA Pilot Plus/Deep PP/D or ESA Whole Home (ESA WH), represents a collaborative effort between Southern California Edison (SCE) and SoCalGas, targeting high-usage CARE customers in shared service territories. Maroma Energy Services (Maroma) was selected as the program implementer in late 2022, with Illume serving as the pilot evaluator.

Strategic adjustments to marketing materials and enhanced email outreach contributed to steady progress throughout 2024. Due to the increased outreach that year, 2025 installations increased by more than 400% compared to 2024 levels.¹⁰ Nine contractors are now actively managing customer leads. The separation of installation contractors from the audit process has streamlined operations in 2025 by enabling contractors to focus exclusively on installation and post-installation activities.

Despite these advancements, both utilities continue to pursue higher installation rates and have implemented several strategies, including:

- Modifying customer segmentation and increasing the frequency of lead list updates provided to Maroma; this increased the eligible pool of customers for the implementer to pursue.
- SCE establishing bulk equipment purchase agreements with Maroma; this assists the implementer with having equipment more readily available for installations, speeding up the installation process, allowing for new installations to take place. By reducing the need for contractors to cover significant equipment costs, this

¹⁰ As mentioned in the Executive Summary, despite exponential improvement in the pilot's performance compared to 2024, therm savings and treatment outcomes continued to be meaningfully stronger under the SoCalGas-administered ESA Main Program.

approach frees up contractor capital, shortens project close-out timelines, and enables contractors to complete more installations concurrently.

- Revising payment terms from Net-30 to Net-10 to expedite contractor reimbursement, which allows contractors to have more capital available to perform more treatments.
- Providing Maroma with weekly usage data, based on the most recent 12 months of consumption, to confirm that percent savings meet program eligibility requirements. Providing up-to-date usage data supports accurate energy modeling, compensates for customer data access challenges, and helps prevent delays that could otherwise slow installation timelines.

After these enhancements were implemented, the pilot experienced improved operational efficiency and contractor performance. As of December 31, 2025, a total of 753 customers have enrolled, with 433 currently in the pipeline. Since this pilot’s inception, the average cost per treated home is \$13,902.

ESA Whole Home Progress PY 2025

Project Status	Number of Homes
In Progress (<i>Enrollment phase</i>)	37
Pending Approval (<i>Enrolled, Pending Review and Approval</i>)	261
Enrolled/Installed (<i>Audit, Savings Verified, Treated, Testing, and Permits</i>)	135
Completed (Invoiced)	170*
De-Enrolled (<i>Min Savings not met, Refused to Participate, Exceeds Mitigation cap</i>)	150*

*not included in current pipeline

1.2 Marketing, Education and Outreach

1.2.1 Provide a summary of the segmentation strategy employed, (i.e. tools and analysis used to segment households, how households are segmented and prioritized for treatment, and how this information is communicated to the contractor/CBO).

SoCalGas remains committed to 1) increasing program awareness among income qualified customers, and 2) reducing participation barriers, including barriers

related to trust and program recognition. SoCalGas's marketing communications are designed to build awareness and drive participation by customers.

Focusing on current CARE customers who had not recently received program services, and prioritizing communities with the lowest enrollment, SoCalGas implemented a multichannel outreach strategy using direct mail, email, and text messaging to support access to ESA Program services. By leveraging customers' familiarity with the CARE Program, the goal was to encourage participation in the ESA Program.

The direct-mail letters and emails provided a program overview, detailed eligibility requirements, and encouraged customers to visit the program's webpage (www.socalgas.com/Improvements) to learn more and apply. Text messages highlighted the potential for no-cost home improvements by professional contractors and directed customers to the program website for details. Leads generated from these communication efforts are referred to program contractors, supporting timely follow-through of program services.

In 2025, the SoCalGas ESA Program reached out to approximately 295,000 customers through direct-mail letters, 245,000 via emails and over 270,000 through text messages.

1.2.2 Provide a summary of how customers are targeted/referred to implementation Pilots (Pilot Plus/Pilot Deep and Building Electrification).

Pilot Plus/Deep Targeting

Customer segmentation modifications maximize the potential for eligible customers which are sent to Maroma quarterly,¹¹ supporting continued growth in participation. Maroma’s targeted marketing, email campaigns for customers with registered email addresses and direct mail for others, has significantly improved response rates, more than doubling since February 2024. Co-branded materials from Maroma, SCE, and SoCalGas continue to enhance credibility, and door-to-door outreach paired with direct mail has proven highly effective. Customers are currently targeted by any of the following factors:

- Residing in Los Angeles, San Bernardino, or Riverside counties,
- A current CARE customer at the time of reporting, and
- 200% above baseline for electricity and 100% above baseline for gas.

Email campaigns launched in April 2024 led to higher response rates in 2025, as the campaign introduced a new and ongoing outreach channel that continued throughout 2025, enabling sustained engagement, repeated targeting of lead lists, higher open and click-through rates, and the collection of updated customer contact information that had previously been incomplete or outdated in utility databases. Customers provided accurate contact information, making it easier for contractors to assess and schedule promising leads. These campaigns helped identify the most qualified customers for enrollment and targeted groups by

¹¹ Prior customer segmentation was sent yearly before modifications.

geography, reducing travel time for auditors and installation crews to maximize efficiency.

1.2.3 Provide a summary of the customer segmentation strategies employed (i.e. tools and analysis used to identify customers based on energy usage, and other factors) and how these customer segments are targeted in program outreach.

In PY 2025, CARE program concentrated its outreach efforts in broader geographical zones, aligning with program needs and customer characteristics, as part of the new program cycle initiatives. SoCalGas focused on customers with year-round high energy usage, who fall within the 200-250% Federal Poverty Guidelines (FPG), identified using CARE as a proxy, or reside in ZIP codes likely to have high eligibility percentage and low penetration rates. This approach enabled focused outreach to underserved areas across the entire SoCalGas service territory.

1.2.4 Describe how the current program delivery strategy differs from previous years, specifically relating to Identification, Outreach, Enrollment, Assessment, Energy Audit/Measure Installation, and Inspections.

In 2025, SoCalGas's ESA Program continued implementing strategies aimed at achieving deeper energy savings as described below. The refined approach across Marketing and Outreach (M&O), Enrollment and Assessment (E&A), and Operations aimed to achieve more profound energy savings while maintaining program effectiveness, supporting affordability and long-term sustainability through deeper per-home energy savings.

Since 2023, the ESA Program has delivered per-home therm savings in excess of 20 therms each year, peaking at more than 28 therms in 2024. In 2025, the program continued to perform at a high level, delivering an average of nearly 26 therms saved per home, while simultaneously installing 3,384 more heating HCS measures, an increase of 69 percent compared to the prior year.¹² This increase in 2025 of HCS measures installed was largely due to the July 2024 change that allowed contractors to install certain negative therm savings HCS measures without it counting against therm savings totals. The pivot attributed to a change in focus to avoid these measures, to installing them without consequence to energy savings goals.

Marketing and Outreach

Yearly ESA Program Paid Media Campaign

The ESA Program was promoted as part of a broader Customer Assistance Programs (CAP) paid media campaign. This campaign launched during the final week of PY 2024 and continued through March 2025, and due to the high level of impressions and page visits generated, this campaign was relaunched from July through December 2025. Details on the metrics of this campaign are shown in section 2.4. The multichannel, targeted mass media effort increased awareness of CAP and directed eligible customers to the ESA Program landing page, supporting affordability initiatives to help reduce household energy costs. The

¹² The heating HCS measures Furnace Repair/Replacement and Furnace Clean and Tune installations totaled 4,921 in 2024. The 2025 total is 8,305 an increase of 3,384 treatments.

campaign used a combination of broad reach and targeted channels, including digital video, digital display, and social media. The campaign’s message, “Everybody needs a little help sometimes,” highlighted the support SoCalGas provides through its suite of assistance programs—such as CARE, ESA Program, and MBL—and directed audiences to the CAP landing page for more information.

Email Optimization

To bolster ESA Program participation, SoCalGas continued personalized email outreach efforts targeting potentially eligible customers in 2025. These efforts focused on high natural gas usage customers throughout the SoCalGas service territory, identified either by income - ranging from 200% - 250% of FPG, or by ZIP codes with a high likelihood of eligibility and low enrollment rates, supporting affordability by focusing on households with the greatest potential bill impacts.

The ESA Program email campaigns had an average open rate of 53.7% and an average Click-Through-Open-Rate of 7.95% (exceeding the industry benchmark of 7%), indicating interest and positive engagement among the targeted audience.

Texting Potentially Eligible Customers

During 2025, SoCalGas continued its text message campaign aimed at potentially eligible customers to raise awareness about the ESA Program. Text messages were tailored for current CARE customers situated in ZIP codes with the lowest

program enrollment who were likely to have a high percentage of eligibility. This targeted approach reached over 270,000 customers.

Recipients were encouraged to explore further details through the program's dedicated webpage (www.socalgas.com/Improvements) that prominently highlights the message, "Save money and energy with professional energy-saving home improvements at no cost to you." This no-cost framing captures customer attention and clearly communicates program value. The webpage emphasizes tangible benefits such as lower energy bills, increased home comfort, and professionally installed improvements by authorized contractors. It also clearly states that both renters and homeowners may qualify, broadening appeal across customer segments, including mobile home park and multifamily residents.

Customers are provided the option to complete an online interest form or apply by phone. Additional trust-building elements include a step-by-step explanation of how the program works, references to oversight by the California Public Utilities Commission, multilingual access (Spanish, Chinese, Korean, and Vietnamese), and examples of potential energy-saving home improvements, all of which help customers better understand and visualize the benefits of participation.

ESA Program Webpage Alignment

SoCalGas redesigned its ESA Program webpage in the Fall of 2024 to deliver a simplified and enhanced user experience for our customers. In PY 2025, the webpage provided clear and consistent communication that helps customers

understand the program and its processes, supporting reliable program participation and reducing confusion during enrollment and service delivery.

The webpage will undergo further updates as the program evolves, incorporating new information and supportive tools such as videos and an updated online platform to serve our customers better.

ESA Program Social Media Posts

In 2025, SoCalGas refined its social media strategy to maintain a continuous, year-round presence with ongoing messaging. This approach allowed Meta's delivery algorithms to optimize performance over time, reducing efficiency losses associated with stop-and-start campaigns. This shift supported more efficient use of budget, and improved overall outreach effectiveness.

As part of this approach, SoCalGas worked with an advertising agency to launch an ESA Program social media campaign on Meta platforms (Facebook and Instagram) during Q3 and Q4 of 2025. These posts reached approximately 5.5 million unique viewers and generated 106,310 link clicks across both general and Hispanic/Latino markets.

Beginning in Q3 2025, the focus expanded from driving link clicks to increasing general program awareness, reflecting a broader outreach objective. Messaging during this period also addressed customer concerns related to ongoing

immigration enforcement activity, which had affected door-to-door outreach and resulted in a temporary program slowdown and canceled contractor appointments.

To build trust and encourage participation, SoCalGas' social media content emphasized that only certified contractors, authorized by SoCalGas, conduct scheduled ESA Program visits to install energy-saving improvements, supporting customer safety and authorized service delivery. This reassurance has remained a consistent component of the outreach strategy to support program enrollment and reduce customer apprehension.

Additional ESA Program Bill Communications

In 2025, SoCalGas promoted the ESA Program through various bill communications targeted at residential CARE customers. Bill communications include inserts, messages printed on the bill, and messages printed on the bill envelope.

Bill inserts remain a cost-effective means to promote program awareness and encourage enrollment, featuring bilingual content in English and Spanish with basic program details. In September of 2025, SoCalGas distributed bill inserts to 753,855 customers.

ESA Program messages were printed directly on mailed bills and deployed in August and November. Relative to traditional bill inserts, on-bill messaging

offered a more cost-effective approach for engaging targeted customers, reaching an estimated 3.5 million CARE-enrolled residential customers. In addition, SoCalGas utilized bill envelope messages in July and October to promote the ESA Program, directing all residential customers receiving paper bills during those months – approximately 4.6 million – to the ESA Program webpage for additional information.

In 2026, SoCalGas will continue leveraging bill communications to promote the ESA Program and other customer assistance initiatives.

Enrollment and Assessment (E&A)

The ESA Program is administered by SoCalGas, with services delivered to eligible households by contractors throughout SoCalGas' service territory. These contractors are responsible for onboarding their outreach staff, including conducting background checks and Live Scan fingerprinting. E&A contractor training covers utility-specific topics such as policies, eligibility, documentation requirements, customer service standards, and practices for leveraging opportunities with other investor-owned utilities' (IOU) low-income programs, including Low Income Home Energy Assistance Program (LIHEAP), Family Electric Rate Assistance (FERA), MBL program, and SCE's one-time bill assistance, the Energy Assistance Fund. Additional training for contractor personnel, like telemarketers and canvassers, is provided to enable them to conduct their own training sessions. Telemarketers do not need an active Home

Improvement Salesperson Registration (HISR) and therefore do not receive a SoCalGas badge after training. In contrast, canvassers in the field are issued a SoCalGas badge upon completing their training. All Program Representatives are required to apply for and maintain an active HISR with the State of California. This process can take up to three months to complete. To support contractors during the onboarding of Program Representatives, SoCalGas implemented the use of temporary badges. These temporary badges allow Program Representatives who are awaiting issuance of their HISR to work alongside a fully credentialed Program Representative in a training capacity. Temporary badge holders are not permitted to create enrollments independently but may observe and assist as a seasoned Program Representative conducts the enrollment process.

In prior program cycles, enrollment efforts primarily emphasized the number of homes treated rather than the level of therm savings achieved per household. This enabled the program to serve a high volume of households and deliver baseline improvements to a broad participant base. Following updated program direction and evolving performance expectations, the program transitioned, placing a greater emphasis on identifying homes with higher therm savings potential through more comprehensive home assessments. Contractors were encouraged to focus on therm-savings measures, particularly appliance services, attic insulation and other measures where feasible, to improve overall program delivery and energy savings outcomes. In 2025, SoCalGas sustained this approach by continuing to target homes with greater therm savings potential while balancing

the installation of essential HCS measures in homes where they were needed most. SoCalGas monitored and engaged its contractor network to reinforce the importance of delivering higher therm savings opportunities while balancing the installation of HCS measures to enhance customer experience and help customers reduce monthly utility costs.

ESA Mobile¹³ Agreement PDF – Additional Documents

SoCalGas continued its practice of delivering the Statewide Energy Education Guide (EE Guide) and flyers electronically, along with the Customer Agreement, after processing an ESA Mobile application. Contractors are encouraged to collect or verify the correct email address from each applicant for document delivery. Additionally, ESA Mobile continues to check if the Primary Language field collected during enrollment matches one of the seven additional languages available for the EE Guide. If it matches, the corresponding in-language EE Guide is sent electronically; otherwise, the English/Spanish version is provided.

Language Barriers

In 2025, SoCalGas continued to address language barriers throughout program implementation by integrating a dedicated language translation line service for ESA Program contractors in the field. This service provides ESA Program

¹³ ESA Mobile is the mobile version of the Home Energy Assistance Tracker (HEAT) software application which SoCalGas ESA Program contractors utilize in the field via handheld devices to implement the ESA Program for SoCalGas.

Representatives with access to live translators in over 80 languages and offers live video translation to help overcome customer trust issues, supporting safe and reliable communication during in-home program delivery.

To further remove language barriers and enhance the delivery of program information and energy education, SoCalGas continued using the EE Guide, which is translated into six languages and Braille. The EE Guide is available on the SoCalGas ESA Program webpage and was delivered electronically to customers whose primary language matched one of the translated versions. Additionally, having the EE Guide online allowed customers needing larger print to access the information provided during program enrollment.

Operations

The supporting efforts reflecting SoCalGas' shift to a program focused on providing deeper energy savings, especially to those in underserved segments, are as follows:

- In 2025, the program continued its focus on enhancing the online enrollment database that our contractors use to generate outreach canvassing lists of households, specifically identifying and targeting designated segments such as HTR, DAC, HEU, and MBL.
- By refining these systems, SoCalGas provided its contractors additional tools to focus their outreach efforts on underserved populations to better provide service delivery to those in need. Additionally, the improved systems facilitated more effective tracking and reporting, allowing SoCalGas to measure the impact of outreach activities and make data-driven decisions for future improvements.
- SoCalGas continued to encourage contractors to install measures during the initial enrollment visit. Typically, ESA Program enrollment program representatives enroll the customer, provide energy education, and assess

measure feasibility during the first visit. A second visit is then scheduled with an energy-savings improvements installer to begin installing the measures. However, some customers may not respond to scheduling attempts or may miss the second appointment, resulting in no measures being installed. By encouraging ESA Program enrollment representatives to install simple measures during the first visit, homes can benefit from energy savings even if a second visit does not occur, supporting reliable delivery of program benefits and earlier affordability impacts.

- Receiving benefits on the first visit can make the program feel more tangible to customers, increasing the likelihood of them keeping subsequent appointments. The approach is flexible, allowing contractors to install only the measures their representatives are comfortable installing, such as those that may be installed manually, without tools.
- SoCalGas provides a monthly report to their ESA Program contractor network, detailing average therms saved and average costs per therm saved, as well as total therms saved compared to their individual therm savings goal. The report includes both total and measure-level data. The report is cumulative, allowing contractors to track their progress toward meeting their annual therm savings goal. This report provided to contractors encourages contractors to prioritize the installation of high therm saving measures in customer homes.
- In 2025, SoCalGas improved the administrative process of onboarding contractor personnel conducting ESA Program enrollments. In previous program cycles, the Badge Request and Specialist Profile forms were designed to be completed as online, fillable documents. For contractors who did not have the current version of Adobe software, this created challenges, as they were unable to access the dropdown menus required to enter information related to Program Representative HISR status, request type, reason for request, job title, and date fields. To improve accessibility for contractors, the forms were modified to replace dropdown menus with checkboxes, allowing users to easily select options that were previously hidden within dropdowns. This modification simplified the process, making it more intuitive and user-friendly. Contractors can now more quickly and accurately fill out forms, reducing time spent on administrative tasks and allowing them to focus on their essential work. This improvement was significant in supporting the program's success by enabling contractor personnel to perform their duties more effectively and efficiently. The improvements to the Badge and Specialist Profile forms proved to be very beneficial in reducing processing time for those requests. The changes eliminated compatibility issues and simplified form completion, supporting reliable and efficient onboarding of contractor personnel.

- All personnel entering a Gas Company customer’s home for the purpose of offering ESA Program services are required to obtain a HISR. In previous program cycles, a Program Representative badge was issued only if the individual already possessed an HISR issued by the California State Licensing Board (CSLB). With the introduction of temporary badges, this requirement was modified, as individuals awaiting their HISR could be issued a badge labeled “Temporary” in lieu of an HISR number. Furthermore, the HISR field remained a non-required field on the badge request form. This decision has reduced delays in badge issuance due to pending HISRs. By not making the HISR a mandatory requirement to request a badge, contractors could receive their badges promptly, ensuring their work is not hindered by administrative hold-ups. This policy helped maintain a smooth and efficient badging process, contributing to the overall success and productivity of the program.

1.2.5 Describe Tribal outreach activities, including a summary of the biannual Tribal meetings, and an up-to-date list of Tribal contacts, including progress towards meeting goal for relationships with non-federally recognized tribes.

In 2025, SoCalGas continued implementing the Tribal outreach directives of D.21-06-015 by collaborating with a Tribal Consultant to coordinate biannual meetings and direct engagement with Tribal leadership. These meetings included both Federally- and Non-Federally recognized Tribes, as well as Tribal community organizations. Discussions focused on identifying community needs, expanding program awareness, and building long-term relationships. Within SoCalGas’s service area there are 19 Federally-Recognized Tribes, ten of which have residential natural gas service. Despite limited natural gas access for many Tribal communities, SoCalGas emphasized inclusive outreach across all Tribes to increase awareness of SoCalGas’s Customer Assistance Programs (ESA Program, CARE, MBL, etc.) and strengthen trust with Tribal leaders and service organizations.

To broaden engagement, SoCalGas worked with its Regional Public Affairs representatives to support Tribal Community Partners with program materials, resource links and direct points of contact. Outreach activities included presentations, informational briefings, and coordinated meetings tailored to the needs identified by each Tribal Community. SoCalGas maintains an up-to-date list of Tribal contacts, which includes Tribal administrators, government affairs staff, and community service personnel for both Federally and Non-Federally recognized Tribes. This list supports ongoing relationship building and reflects continued progress expanding outreach to non-federally recognized Tribes. The current contact list is provided confidentially in Appendix A.

Outreach presentations and meetings conducted by SoCalGas in 2025 with Tribes and Tribal organizations are summarized in the table below.

Tribal Nations	
Agua Caliente Band of Cahuilla Indians	Pechanga Band of Luiseño Mission Indians of the Pechanga Reservation
Augustine Band of Cahuilla Indians	Santa Ynez Band of Chumash Mission Indians of the Santa Ynez Reservation
Cahuilla Band of Mission Indians of the Cahuilla Reservation	Soboba Band of Luiseño Indians
Chemehuevi Indian Tribe of the Chemehuevi Reservation	Tachi Yokut Tribe of Indians
Fort Mojave Indian Tribe	Torres-Martinez Desert Cahuilla Indians
Los Coyotes Band of Cahuilla and Cupeno Indians	Tule River Indian Tribe of the Tule River Reservation

Non -Federally Recognized Tribes / Organizations Representing Tribal Nations	
American Indian Chamber of Commerce of California	Owens Valley Career Development Center
Barbareño/Ventureño Band of Mission Indians	The Salinan Tribe of Monterey and San Luis Obispo Counties
Fernandeno Tataviam Band of Mission Indians	Southern California Indian Center
Kern Valley Indian Community - Nuwa (Kawaiisu)	Southern California Tribal Chairmen's Association
Juaneño Band of Mission Indians	Tribal Alliance of Sovereign Indian Nations (TASIN)
Indigenous Women Rising	

In accordance with D.21-06-015, SoCalGas confirms it has an up-to-date list of Tribal contacts. The Tribal outreach list contains contacts of Tribes and Tribal service organizations that SoCalGas has contacted to provide income-qualified assistance information. Efforts were made to contact Tribal staff instead of Tribal members as a courtesy to preserve a level of privacy for Tribal members. Those contacted and listed are either Tribal administrators, government affairs, economic development, or emergency services personnel. Additionally, SoCalGas provided the Tribes with a referral/link to the socialgas.com/Assistance webpage, email and cell phone contact information for SoCalGas staff, a brief presentation of SoCalGas's Customer Assistance Programs, and a one-page informational pamphlet in PDF and JPG formats for internal distribution to Tribal members by the Tribal Administration. The list of Tribal contacts is provided confidentially in Appendix A.

1.2.6 Track Costs of AB 793 related Energy Management Technologies programs (identify all of the programs or initiatives that will be able to benefit from the availability of the end-use and electric usage profiles, and to coordinate with the relevant proceedings so that the relevant costs can be considered in those proceedings' cost-effectiveness decision-making), including costs for Energy Education.

SoCalGas did not implement any new Energy Management Technology programs that could have been added to its ESA Program in 2025.

1.2.7 Managing Energy Use

ESA Program E&A representatives consistently provide personalized energy-saving tips to customers, tailoring energy education to each individual household's needs. For instance, advising customers on optimal thermostat settings helps maintain a comfortable home environment, reduces energy consumption, and prevents their furnace from overworking. Additionally, customers receive the SoCalGas MyAccount flyer via email, which offers guidance on managing bills and energy use online. This includes instructions on online bill payment, enrolling in automatic monthly payments and paperless billing, setting up bill alert notifications, paying by text, scheduling services, and reviewing past usage to identify opportunities for reducing gas consumption (energy use). These tips and resources are shared through verbal discussions and with either a physical or online Energy Education Guide during the enrollment process.

1.2.8 Services to Reduce Energy Bill

Before enrolling in the ESA Program, customers are informed about the potential

energy and bill savings they may achieve by having their home serviced by an ESA Program contractor. Throughout the enrollment, assessment, and energy education process, customers learn various ways to reduce their energy use which may result in reduced energy bills. Additionally, customers receive information about other assistance programs through a leave-behind infographic provided after enrollment. This includes a California Emerging Technology Fund (CETF) flyer that informs eligible customers about the opportunity to enroll to receive low-cost home internet services, details on the CARE program, which offers a 20% discount on energy bills, the Medical Baseline program that provides additional natural gas at the lowest rate for qualifying medical conditions, Past Due Bill Forgiveness programs, appliance rebates, and access to the My Account portal for tracking and paying bills and managing gas services.

1.3 Energy Savings Assistance Program Customer Enrollment

1.3.1 Report the number of customers or households treated, the IOU specific household treatment target, and the percentage of households treated. If the IOU was not able to reach the total household target, please explain.

In PY 2025, SoCalGas treated 45,535 homes, representing 65 percent of the 2025 household treatment target of 69,837. SoCalGas continued to demonstrate strong and sustained performance by intentionally prioritizing deeper energy savings per home within the main ESA Program. In the context of the challenges described above, contractors focused on the homes with greater potential to achieve higher therm savings and placed less emphasis on homes with limited therm saving potential, by using home evaluations. This contributed to average therm savings

per household have increasing substantially over the current program cycle, rising from approximately 6 therms per home in 2022 (the first full year of the cycle) to more than 20 therms per home in 2023, approximately 29 therms per home in 2024, and over 25 therms per home in 2025. This overall progression reflects continued success in delivering meaningful and durable savings to participating households year over year.

This focus on savings depth supports affordability outcomes by helping reduce ongoing energy costs per household and underscores the program's emphasis on delivering reliable, high value savings. As a result, efficiency per home remains a key driver of overall program performance contributing to SoCalGas's ESA Program exceeding its therm savings goal of 1,435,220, consistent with SoCalGas's recent performance levels.

Taken together, PY 2025 results for the main ESA Program reflect a program that continues to deliver meaningful savings year over year, balances household reach with savings depth, and remains focused on advancing affordability and reliable energy savings for low-income customers.

1.3.2 Please summarize new efforts to streamline customer enrollment strategies, including efforts to incorporate categorical eligibility and self-certification.

In 2025, SoCalGas continued its streamlined approach to customer enrollments

into the ESA Program using Categorical Eligibility (CE)¹⁴ and self-certification¹⁵ methods. With CE, customers can provide documents showing recent participation in designated state or federal assistance programs, eliminating the need for additional income documentation that may present unnecessary barriers to enroll in the ESA Program and/or CARE. With self-certification, customers living in designated low-income PRIZM codes only need to provide their total household size and stated annual income and sign a statement certifying that their income meets the program's eligibility guidelines.

Categorical Eligibility: SoCalGas continues to list CE programs on its website and in ESA Program brochures, which are available in multiple languages, including English, Spanish, Chinese, Korean, and Vietnamese. These resources aim to raise customer awareness about the minimal documentation required for enrolling in the ESA Program when already participating in certain state or federal assistance programs. To update ESA Program CE documentation requirements and streamline the enrollment process, SoCalGas reviewed changes to CE program administration, including allowing contractors to submit virtual

¹⁴ Categorical programs include: Medicaid/Medi-Cal, Women, Infants and Children Program (WIC), Low-Income Home Energy Assistance Program (LIHEAP), Supplemental Nutrition Assistance Program, Tribal Temporary Assistance to Needy Families (TANF), Bureau of Indian Affairs General Assistance (BIA GA), and the National School Lunch Program.

¹⁵ In D.05-10-044, the CPUC allowed SDG&E and SoCalGas to use 2000 census tract data to identify neighborhoods where they could suspend income documentation requirements enroll customers in the ESA Program through self-certification, if those customers lived in areas where 80% of the households were at or below 200% of the Federal Poverty Level (FPL). D.21-06-015 allows customers to self-certify that they meet the ESA Program eligibility requirements to receive ESA basic measures.

screenshots of Special Supplemental Nutrition Program for Women, Infants, and Children (WIC) benefits that have recently become available to recipients.

Providing contractors with clear direction early on helps minimize questions and potential delays in customer enrollment.

Self-certification: SoCalGas offers various methods for households to income qualify via self-certification such as PRIZM code, CARE Post Enrollment Verification (PEV), and leveraging other IOUs' ESA Program enrollment for SoCalGas ESA Program enrollment.

1.3.3 If the IOU has failed to meet its annual energy savings goal, please provide an explanation of why the goal was not met. Explain the programmatic modifications that will be implemented in order to accomplish future annual energy savings goals.

Energy Savings Goal

The ESA Program exceeded ed its therm savings goal for the second straight year. For PY 2025, SoCalGas recorded 1,162,289 therms saved achieved through the main ESA Program alone. When combining these therm savings with the MFWB therm savings of 416,576, the total 2025 savings collectively exceed the therm savings goal of 1,435,220 by double digit percentage points (10%). These combined results further reinforce SoCalGas's consistent strong program performance in significantly exceeding its energy savings goals deep into the current program cycle.

1.4 Disability Enrollment Efforts

1.4.1 Provide a summary of efforts to which the IOU is meeting the 15% enrollment goal.

The penetration rate for disability enrollment efforts increased from 11% in PY 2024 to 14% in PY 2025. As in previous years, SoCalGas continued targeting increased enrollments within the disabled community across SoCalGas's service areas. SoCalGas has a dedicated liaison assigned to work with and expand the company's reach within the disabled community. The liaison continued to leverage existing relationships to expand outreach to organizations, work with organizations serving the disabled community, provide educational materials, and facilitate information sessions and trainings for case workers and staff of organizations working with disabled communities. Some of SoCalGas's highlights for disability outreach in PY 2025 included working with key organizations and sponsoring key events listed below. Organizations that SoCalGas collaborated with to promote CAP materials and build awareness to help increase enrollments as local, trusted resources for the disabled community include:

- Blindness Support Services
- Disabilities Community Resource Center
- Fiesta Educativa
- Frank D. Lanterman Regional Center
- Goodwill of Orange County
- Greater Los Angeles Agency on Deafness
- Orange County Autism Foundation
- South California Resource Services for Independent Living (SCRS-IL)
- South Central Los Angeles Regional Center

SoCalGas had representation at 956 events specifically held for the disability community, attended by 134,855 people throughout SoCalGas's service territory.

SoCalGas will continue to enhance its reach by employing various practices and approaches to remain connected with the disabled community and identify other community partners that provide services for disability communities.

1.4.2 Describe how the Energy Savings Assistance Program customer segmentation for ME&O and program delivery takes into account the needs of persons with disabilities.

In 2025, SoCalGas sustained its commitment to accessibility by producing large-print customer assistance program brochures for vision-impaired customers.

Additionally, Braille customer assistance program brochures were distributed to Community Based Organizations (CBOs) supporting Braille users and featured at outreach events.

Since 2019, SoCalGas’s My Account online bill pay platform has consistently earned the AA¹⁶ Seal of Approval from the Center for Accessible Technology (CforAT), confirming it meets the AA-level accessibility criteria. This certification, maintained through 2025, verifies that key online functions, particularly those within the “Account” section, support inclusive access for customers with disabilities.

¹⁶ Denotes WCAG level of compliance. To meet Level AA, a webpage must satisfy all Level A and Level AA success criteria or provide a Level AA conforming alternate version. The same criteria that Federal sites are required to meet.

To further support compliance, SoCalGas conducts regular audits aligned with the Web Content Accessibility Guidelines (WCAG) 2.1. These reviews confirm that its website remains user-friendly for customers who rely on screen readers and other assistive technologies.

As of 2025, SoCalGas entered a contract with The Paciello Group (TpGI), extending through 2028, to conduct comprehensive accessibility audits of the website, implementing techniques for accessibility compliance with WCAG 2.2AA. Continuous updates to site structure, navigation, and content design reinforce SoCalGas’s dedication to providing an inclusive, accessible online experience for all customers.

1.4.3 Identify the various resources the IOUs utilize to target the disabled community and the enrollments as a result.

Disability Enrollments			
Source	Total Enrollment	Disability Enrollment	% of Disability Enrollment
Campaign	791	213	27%
Capitation	39	2	5%
CARE Referral	1,626	128	8%
CARs Referral	213	17	8%
CPUC 2020 Clear Plan	260	16	6%
Direct Mail	333	80	24%
Energy Efficiency Referral	180	45	25%
ESA Mobile ESAP SCE	1	0	0%
Gas Bill Insert	753	221	29%
HEAT Canvassing List	300	4	1%
InfoLine 211	69	7	10%
Joint Utility Datasharing	1	0	0%
Joint Utility ESAP SCE	5	1	20%

LI-HEAP	176	11	6%
Master Agreement	79	3	4%
Media/Leveraging Dept./Event	80	10	13%
Muni	31	2	6%
Neighbor/Friend/Relative Referral	1,620	239	15%
Newspaper/Radio/Television	58	20	34%
Other	4	3	75%
Other Utility or Municipality Referral	716	203	28%
Outreach – Canvassing	32,001	3,857	12%
Received services at another location	59	11	19%
REN Referral	3	0	0%
SoCalGas – Internet	47	14	30%
SoCalGas Referral	1,534	394	26%
SoCalGas Email	407	109	27%
Telemarketing – Telephone	2,315	455	20%
Univision – Telethon	4	2	50%
Whole Neighborhood Approach	707	72	10%
Total	44,412	6,139	14%

1.4.4 If participation from the disabled community is below the 15% goal, provide an explanation why.

Although the participation rate for disabled enrollments fell slightly below the 15% goal in PY 2025 at 14%, many efforts were pursued to enhance and expand outreach to the disability community and results have been increasing year after year. SoCalGas continued to partner with several key organizations such as Blindness Support Services, Fiesta Educativa, Disability Community Resource Center, MEND San Fernando, OC Autism Foundation, and Southern California Rehabilitation Services—all trusted organizations that provide special resources for these communities. SoCalGas’s outreach included presentations, workshops, training of organization staff and case workers, and distributing printed and electronic program materials for one-on-one visits with community members and at local community events.

Additionally, disability enrollments are tracked by an ESA Program enrollment representative who may not be aware of a customer's disability at the time of enrollment, particularly if the customer does not self-disclose their disability. In PY 2025, SoCalGas continued to increase collaborative partnerships with organizations that work towards enrolling individuals with disabilities who may qualify for the ESA Program as well as other Customer Assistance Programs such as CARE and MBL, as well as participating in events geared towards community members. As in previous years, SoCalGas has continued to focus its efforts on organizations and events with a focus to reach and enroll special needs customers.

1.5 Leveraging Success Including LIHEAP

In PY 2025, SoCalGas continued to leverage resources to support low-income customers. Resources are leveraged to increase customer enrollments, achieve measurable cost savings, and deliver energy savings to participating low-income households. Effectiveness is measured by tracking the following criteria:

- **Dollars saved:** Leveraging efforts are measurable and quantifiable in terms of amount of dollars saved by the IOU. Leveraging and integration activities reflect cost savings and resources leveraged by SoCalGas, including leveraging activities such as:
 - Shared, contributed, and donated resources,
 - Shared marketing materials,
 - Shared information technology,
 - Shared programmatic infrastructure, and
 - Replacement and repair of measures.

These examples represent some of the cost and/or resource savings achieved by SoCalGas.

- **Amount of Dollars Saved:** SoCalGas saved \$2,488,771 through its leveraging efforts in 2025. For additional detail regarding dollars saved from leveraging efforts, see ESA Program Table 13A – Leveraging & Integration in the attachments.
- **Energy Savings and Benefits:** Leveraging efforts are measurable and quantifiable in terms of home energy benefits and savings to eligible households.
- **Enrollment increases:** Leveraging efforts are measurable and quantifiable in terms of program enrollment increases and/or customers served. Enrollments represent customer participation. There were 21,629 enrollments achieved from leveraging efforts in 2025.

For SoCalGas’s ESA Program dollar savings, energy savings, and enrollment tracking and reporting associated with leveraging efforts, refer to ESA Program Table 13A – Leveraging & Integration in the attachments.

Additionally, information regarding LIHEAP leveraging efforts related to enrollment increases can be found in ESA Program Table 12 – Categorical and Other Enrollment in the attachments.

1.5.1 Describe the efforts taken to reach out to low income customers and coordinate the Energy Savings Assistance Program with other related low-income programs offered outside the IOU.

SoCalGas identifies participating agencies based on two categories: (1) Water Agencies/Providers, and (2) Municipal Electric Providers. Water agencies focus on water measures such as HE clothes washers, faucet aerators, low flow shower heads, thermostatic shower valves, tub spouts and low flow toilets. Participating agencies contribute to SoCalGas’s ESA Program dollar savings and energy savings/benefits through co-funding of HE clothes washers and/or the other water measures listed above. In PY 2025 the following agencies participated in leveraging water measures:

- Anaheim Public Utilities¹⁷
- California American Water¹⁸
- Eastern Municipal Water District¹⁹
- Fontana Water Company²⁰
- Liberty Utilities²¹
- Metropolitan Water District²²
- Moulton Niguel Water District²³
- San Gabriel Valley Water Company²⁴
- Rancho California Water District²⁵

Due to rising costs, suppliers are installing fewer HE Clothes Washer units that qualify under CEE Tier 1 criteria. This reduction in qualifying measures has limited our ability to co-fund these installations in partnership with the water agencies. As a result, co-funding from all water agencies totaled \$348,489 in PY 2025.

¹⁷ Anaheim Public Utilities (“APU”) – delivers water to the city of Anaheim’s 345,000 residents and more than 15,000 businesses.

¹⁸ California American Water serves customers throughout California, and its collaboration with SoCalGas focuses on customers residing in Los Angeles and Ventura Counties.

¹⁹ Cities in the Eastern Municipal Water District service territory include Hemet, Menifee, Moreno Valley, Murrieta, Perris, San Jacinto, and Temecula.

²⁰ Fontana Water Company serves the communities of Fontana, Rialto, Rancho Cucamonga, Ontario, and unincorporated areas of San Bernardino County.

²¹ Liberty Utilities, formerly Park Water Company serves the Compton/Willowbrook, Lynwood, and Bellflower/Norwalk water systems.

²² Metropolitan Water District is a regional wholesaler that delivers water to 26-member public agencies: 14 cities, 11 municipal water districts, one county water authority – which in turn provides water to more than 19 million people in Los Angeles, Orange, Riverside, San Bernardino, and San Diego and Ventura counties.

²³ Moulton Niguel Water District services more than 170,000 customers in Laguna Niguel, Aliso Viejo, Mission Viejo, Laguna Hills, Dana Point, and San Juan Capistrano.

²⁴ San Gabriel Valley Water Company serves the communities of: Arcadia, Baldwin Park, El Monte, Industry, Irwindale, La Puente, Montebello, Monterey Park, Pico Rivera, Rosemead, San Gabriel, Santa Fe Springs, South El Monte, West Covina, Whittier and unincorporated portions of Los Angeles County, in the communities of Bassett, Hacienda Heights, Los Nietos and South San Gabriel.

²⁵ Rancho California Water District is a special water district serving approximately 150,000 people in Temecula, Murrieta, and unincorporated areas of Riverside County.

The other category for leveraging opportunities focuses on municipal electric providers. SoCalGas administers programs for municipal electric providers by collaborating with ESA Program contractors to install electric measures such as Light Emitting Diode (LED) bulbs, smart power strips, LED torchiere lamps, A/C tune-ups, refrigerator assessments, duct testing & sealing, and room A/C replacement. Qualifying measures varied per electric provider and availability of funding. The municipal electric providers that partnered with SoCalGas in PY 2025 include:

- Anaheim Public Utilities²⁶
- Riverside Public Utilities²⁷

Municipal Utility	Number of Units Served
Anaheim Public Utilities	1,382
Riverside Public Utilities	339
Total	1,721

SoCalGas also collaborated with the Metropolitan Water District to install cold water measures such as premium high efficiency toilets (0.8 or 1.0 gallons per flush to replace existing toilets with 1.6 gallons per flush or higher), weather-based irrigation controllers, and smart hose bib controllers that are entirely funded by Metropolitan Water District.

Water Agency	Number of Units Served
Metropolitan Water District	577

²⁶ Anaheim Public Utilities – delivers electricity to the city of Anaheim’s 345,000 residents and more than 15,000 businesses.

²⁷ Riverside Public Utilities – serves more than 109,616 metered electric customers and over 68,640 metered water customers (serving a population of more than 300,000) in and around the City of Riverside.

SoCalGas also collaborated with Los Angeles Department of Water and Power (LADWP) to install premium high efficiency toilets (0.8 or 1.0 gallons per flush to replace existing toilets with 1.6 gallons per flush or higher) that are entirely funded by LADWP. LADWP is also co-funding other measures such as HE clothes washers, faucet aerators, low flow shower heads, thermostatic shower valves, and tub spouts.

Agency	Number of Units Served
Los Angeles Department of Water and Power	272

1.5.2 In addition to tracking and reporting whether each leveraging effort meets the above criteria in order to measure the level of success, please describe the Other Benefits resulting from this particular partnership not captured under the 3 criteria described above.

For SoCalGas’s ESA Program dollar savings, energy savings/benefits, and enrollment tracking and reporting associated with leveraging efforts, refer to ESA Program Table 13A – Leveraging & Integration.

In PY 2025, SoCalGas’s collaborative efforts with Anaheim Public Utilities and Riverside Public Utilities created leveraging opportunities to provide comprehensive energy savings to the joint customers of the respective municipal electric providers. The added benefits of working together include the addition of water-saving devices, leveraging combined marketing materials, and focused efforts on high potential customers including those in disadvantaged communities. The preference of customers to participate in programs that provide water, electric, and natural gas measures at the same time contributes to higher

participation rates and greater customer satisfaction. The joint efforts reduce the number of touchpoints per customer which traditionally cause disruption, and the combined efforts minimize administrative burden and cost inefficiencies.

Additionally, leveraging with water utilities and districts to offer HE clothes washers provides up to 8,000 gallons per washer, per year savings. HE clothes washer purchase costs may otherwise limit low-income customers from realizing the water and energy savings. Leveraging of the ESA Program with other water utilities that do not have direct install programs for HE clothes washers provides an opportunity to reach low-income customers that would otherwise not be able to fund the difference between the appliance cost and available water utility rebate offers, as well as demonstrates SoCalGas's support for statewide conservation efforts.

1.5.3 Please provide a status of the leveraging efforts with CSD. What new steps or programs have been implemented for this program year? What was the result in terms of new enrollments?

SoCalGas continued to coordinate with the California Department of Community Services and Development's (CSD) LIHEAP in support of the ESA Program. In 2025, SoCalGas utilized one LIHEAP agency to conduct ESA Program enrollment, assessment, and installation services. Through its outreach and enrollment activities, the agency leveraged LIHEAP customers who had received payment assistance, as a source of potential ESA Program leads. The LIHEAP income verification process also supported ESA Program enrollment by reducing the time required for contractor personnel to verify customer eligibility for

program services. In 2025, the LIHEAP contractor enrolled 11,789 customers into the ESA Program.

1.5.4 Describe the coordination efforts with water agencies or companies (wholesalers or retailers).

SoCalGas's leveraging opportunities maximize joint energy collaboration where possible for comprehensive natural gas, electric and water savings. SoCalGas's ESA Program has coordinated co-funding opportunities and program support with numerous water agencies. These efforts promote collaboration and allow for comprehensive savings to be captured and reported.

SoCalGas continues to install cold-water measures funded entirely by these water agencies. One example is SoCalGas's partnership with Metropolitan Water District to install premium HE toilets and weather-based irrigation controllers. Additionally, SoCalGas partners with Los Angeles Department of Water and Power to install premium HE toilets through the ESA Program.

1.6 Integration Success

1.6.1 Describe the new efforts in program year to integrate and coordinate the Energy Savings Assistance Program with the CARE Program.

In 2025, SoCalGas continued to employ data sharing, Integrated Voice Recognition (IVR), Customer Contact Center (CCC), and other efforts as noted below, to connect the two low-income programs.

Data Sharing:

In an ongoing effort to reduce barriers to participation and enhance overall program accessibility, SoCalGas's ESA and CARE Programs continued to coordinate and share enrollment data. Customers determined to be CARE-eligible through their participation in the ESA Program were automatically enrolled in the CARE discount and received PEV approval when income eligibility was verified by the ESA Program. CARE customers who had not yet participated in the ESA Program were referred for potential enrollment.

Integrated Voice Recognition (IVR): Multi-lingual messages regarding the ESA and CARE Programs are made available on SoCalGas's main call center IVR system. While on hold to speak to a Customer Service Representative (CSR), customers hear an automated message regarding Customer Assistance Programs including CARE, ESA, and MBL. This message is also reinforced by live CSRs when customers call to establish service or make bill payment arrangements and take CARE applications over the phone during these specific calls. Additionally, a separate IVR phone number is printed on self-certification and recertification CARE applications. Through the IVR, customers can follow the prompts in either English or Spanish and respond verbally or through push-button on their phone, to enroll in CARE or recertify their eligibility.

Branch Payment Offices (BPO): Customer Assistance Program information is displayed and available at SoCalGas BPOs, as well as 244 of the 382 Authorized

Payment Locations (APL). When income guidelines are updated each year, all branch offices and payment locations receive new brochures, which are regularly replenished. BPO clerks are trained to promote both the CARE and ESA Programs.

Customer Contact Center (CCC): Since February 2018, SoCalGas CSRs have been offering CARE and enrolling customers during turn-on and payment extension calls. Information regarding other Customer Assistance Programs is provided to facilitate enrollment of eligible customers in the ESA Program and MBL. When a customer expresses interest in the ESA Program, a direct 800 telephone number is provided. MBL applications are mailed upon request. In addition, SoCalGas offers information on integrated programs for residential customers by mailing a conservation package during CCC bill inquiries. The package includes information on the ESA Program, CARE, MBL, Energy Efficiency (EE) rebates and energy-saving tips to help customers manage their gas bills, paired with information regarding CSD programs.

Outreach by Field Employees: Field service employees continued to distribute CAP brochures to customers whenever it was necessary to enter a customer's home.

1.6.2 Describe the new efforts in program year to integrate and coordinate the Energy Savings Assistance Program with the Energy Efficiency Residential Program.

SoCalGas' Multifamily Single Point of Contact (SPOC) team's fundamental role

is to provide affordable MF property owners with fully integrated, energy savings opportunities. During 2025, the SoCalGas SPOC team provided detailed information and contact with IOU/Muni and Water provider programs. The team provides direct support to owners and property management stakeholders that simplifies and accelerates participating in utility programs and services.

Traditionally, these property owners participate in ESA Program and Multifamily Energy Savings (MFES) Common Area Measures (CAM), which can be at no-cost to the owner. To better serve our MF market segment partners, SoCalGas's SPOC team continued to evolve its role, and now offers support to assess applicability of several additional programs and services. These include enrollment into CARE, On-Bill Financing (OBF) (a 0% interest financing option from SoCalGas that helps property owners pay for energy-efficiency upgrades over time through their monthly utility bill), Energy Efficient New Home (a SoCalGas incentive program that rewards new home builders for installing high-efficiency equipment that exceeds current energy code requirements) and Solar Thermal programs. SoCalGas's SPOC team also facilitated internal connections for owner requests to other available services on a range of property and/or project-related issues including Field/Planning services, new/upgrades to gas service and meter sets. Additionally, the team has also assisted owners of affordable housing with connections to electric and water saving programs which can provide measures such as ceiling fans, refrigerators, windows, toilets, and turf removal, among others.

During PY 2025, the SPOC model advanced coordination between the ESA Program and the EE Residential Program. The SPOC team worked closely with the ESA Program MF implementer, Resource Innovations (RI) (formerly Richard Heath & Associates - RHA), and San Diego Gas & Electric (SDG&E) to streamline customer intake, reduce administrative barriers, and make certain multifamily property owners could more easily access in unit, ESA Program measures in combination with whole building and Residential EE offerings.

Key integration efforts included:

- **Unified customer engagement pathways** enabling property owners to access ESA Program in unit measures, MFWB upgrades, and Residential EE rebates through a single coordinated point of contact. To date, SoCalGas's SPOC team has delivered over 10,000 in unit treatments for third-party contractor, Resource Innovations.
- **Improved alignment of ESA Program and EE program pathways**, allowing customers to pair no cost ESA Program measures with deeper whole building upgrades that improve long term affordability and operational performance.
- **Supported delivery of (44) MFES enrollments and (43) Multifamily Energy Alliance (MEA) projects**, providing coordinated guidance and technical support across more than (80) multifamily projects during PY 2025.
- **Provide multifamily owners a clear pathways into all applicable ESA Program and EE programs**, including MFWB, MEA, and financing options such as OBF, helping customers leverage the full suite of available programs.
- **Total SPOC influence resulted in more than 15,000 units being served across ESA Program and/or EE programs**, reflecting strong customer engagement and improved program accessibility for owners and residents.

1.6.3 Describe the new efforts in program year to integrate and coordinate the Energy Savings Assistance Program with the Energy Efficiency Government Partnerships Program.

SoCalGas no longer has Local Government Partnership programs and instead leverages third-party programs to engage with local governments and deliver energy efficiency programs. SoCalGas provided CAP information, including the ESA Program materials to Local Government Program Managers for virtual distribution and in person distribution to partners as well at community events.

1.6.4 Describe the new efforts in program year to integrate and coordinate the Energy Savings Assistance Program with any additional Energy Efficiency programs.

In addition to the established ESA Program and MFES enrollment path, SoCalGas's SPOC team continually looks for opportunities to layer-on energy-saving measures with other EE programs. This coordination across program teams has allowed the SPOC team to bring forward opportunities which can deliver additional energy savings that fall outside of the ESA Program or MFES scope. In 2025, thirteen multifamily properties enrolled in the MFES program through the SoCalGas SPOC team that had prior or concurrent participation in the ESA Program or other SoCalGas funded energy efficiency programs, consistent with program layering across participation pathways.

Importantly, the SoCalGas SPOC team's cross-portfolio approach and intimate knowledge of our customer's property portfolio enables the team to pivot ESA Program and MFES projects to the EE team to evaluate for participation.

SoCalGas continues to refine data collection and tracking systems, perform cross-

departmental communication, and deploy coordination strategies with the objective of serving the full scope of customer needs to accentuate benefits achieved by programs and support customer affordability.

These efforts also improved administrative efficiency, enhanced the overall customer experience, and established a unified program strategy for multifamily property owners to pursue both in unit and whole building upgrades.

Key activities included:

- **Providing cross program technical guidance** for multifamily owners to navigate ESA Program requirements alongside incentives and measures available through additional EE programs.
- **Improving income verification and documentation procedures**, reducing administrative burden and accelerating enrollment and approval timelines.
- **Streamlining post-installation evaluation and payment processes**, strengthening coordination with program implementers and improving project delivery consistency.
- **Managing (43) MEA enrollments (2000 + Units)**, an EE program focused primarily on in-unit tankless water heater replacements. This measure is not currently offered through the MFES program, making MEA a critical complement for customers needing unit level domestic hot water improvements.
- **Coordinating simultaneous MEA and MFES participation** for many property owners, enabling MEA to address in unit tankless replacements while MFES provided common area and whole building measures (e.g., boiler systems, storage tanks, pump assemblies, in unit water saving devices). This blended approach allowed customers to install more energy efficient equipment across entire properties, aligning in unit upgrades with larger central plant improvements for deeper energy savings and improved system reliability.

One SoCalGas SPOC Integrated Program Delivery Model as an example: Retirement Housing Foundation & Pilgrim Towers (Eaton Fire, Recovery Support, and Cross Program- Integration)

During PY 2025, one meaningful example of cross-program coordination involved Pilgrim Towers North & East, two senior affordable housing communities owned and operated by the Retirement Housing Foundation (RHF). The properties are located a few blocks from the area directly impacted by the Eaton Fire, and the buildings experienced substantial smoke infiltration, which compromised multiple mechanical systems and impacted hot water reliability for residents.

To support the property's recovery and maintain safe, reliable energy service for more than 400 senior households, the SPOC team supported the property owner to enroll into the MFES program while simultaneously coordinating eligibility across additional ESA Program and EE pathways. The property was also enrolled onto CARE to help stabilize energy costs for income qualified residents.

Recognizing the need for whole property restoration, the SPOC team also referred the owner to the local municipality to explore additional water and electricity saving measures, promoting a comprehensive approach to postfire building resilience.

Through MFES, Pilgrim Towers received eligible upgrades, including:

- High efficiency commercial boilers;
- A 462gallon hot water storage tank;
- Expansion tank and scale reduction filtration;
- Recirculation and boiler pumps and

- In unit measures such as weatherstripping and water saving devices.

These no cost improvements are expected to save over 150,000 therms over 10 years, while stabilizing hot water delivery and improving overall system reliability.

1.6.5 Describe the new efforts in program year to integrate and coordinate the Energy Savings Assistance Program with the Demand Response Programs including successes in Air Conditioning Cycling or other Demand Response Programs, and the new Summer Reliability programs from D.21-12-015.

This section is not applicable to SoCalGas.

1.6.6 Describe the new efforts in program year to integrate and coordinate the Energy Savings Assistance Program with the California Solar Initiative Programs.

SoCalGas does not have activity to report for 2025. Funding was not available for this program year.

1.6.7 Provide the number of referrals to the Single Family Affordable Solar Homes Program Administrator.

This section is not applicable to SoCalGas.

1.6.8 Report annually the number of participation referrals provided to other PAs and the number of leads they successfully acted on by program type.

During PY 2025, the SoCalGas MF SPOC team continued to support the MFES program, implemented by Resource Innovations, by delivering full project enrollment packages directly to the implementer. These enrollment packages include complete site documentation, measure opportunities, and customer intake

information necessary for MFES to perform a technical review and begin project development. These direct submissions represent fully qualified opportunities identified through the SPOC team's engagement with multifamily owners and operators.

In addition to these directly delivered MFES project packages, the SPOC team has also provided a substantial volume of property level participation referrals since program launch. Through ongoing engagement across its portfolio network, the SPOC team has supplied more than 63,000 in-unit leads across more than 750 multifamily properties for consideration and potential enrollment in MFES.

1.7 Workforce Education & Training

1.7.1 Please summarize efforts to improve and expand Energy Savings Assistance Program workforce education and training. Describe steps taken to hire and train low income workers and how such efforts differ from prior program years.

In 2025, SoCalGas continued to promote the growth of a trained ESA Program workforce and applied its more direct approach to expand the employee pool for contractors and promote contractor expansion. Contractors are responsible for distributing online training modules to potential outreach personnel. Following successful completion of the training, contractors submit a request to SoCalGas for test administration. SoCalGas relies on its contractors to conduct initial prescreening and hiring of candidates they determine are best suited for performing ESA Program enrollment services. As part of the onboarding process, contractors are responsible for ensuring that each selected Program

Representative completes the required online training. These training modules are available on demand through contractor provided online platforms, allowing Program Representatives to access and complete the curriculum at any time before performing enrollment activities. The SoCalGas-developed curriculum has been provided to contractors for their use when hiring canvassers who do not enter customers' homes or telemarketers who seek customer interest via a live phone call. SoCalGas made this training platform available online to all contractors, mindful of customer comfort levels and that enrollment Program Representative training expectations are met.

The most fundamental change that SoCalGas has introduced in the workforce and education space in recent years was to offer and maintain a fully online E&A training and testing platform to prospective ESA Program enrollment program representatives. SoCalGas has utilized a training platform that allows contractors to continue sending prospective enrollment program representatives to train on SoCalGas's E&A policies and procedures to be prepared to enroll eligible customers into the ESA Program. SoCalGas utilizes an online training platform that is user-friendly for prospective enrollment program representatives and can be managed across all levels of electronic devices and technical expertise. SoCalGas's platform allows for learning modules to be easily updated to accommodate program policy and procedure changes, accepts various forms of multi-media resources, and possesses the ability to store data for retrieval later. SoCalGas's online curriculum is based on the curriculum that was

previously taught in-person. By making the materials available online, prospective enrollment program representatives will have the flexibility to study at their own pace and in locations and times that best suit their needs. The testing platform deployed by SoCalGas offers valuable resources to design, develop, and administer testing to an increased number of candidates in a wholly virtual setting. SoCalGas increased its testing schedule to include the first three Fridays of every month and potentially administer off-cycle testing sessions upon contractor request. This online testing process allowed SoCalGas to offer E&A testing to 180 candidates in 44 sessions throughout 2025. Developing and implementing the fully online training and testing platforms that convey all the necessary policies and procedures to prospective enrollment program representatives in a safe, convenient, and remote format has allowed for a steady pace of enrollment program representatives onboarding throughout the year.

SoCalGas also utilizes CBOs and private contractors to provide program services, including E&A, Heating Ventilation and Air Conditioning (HVAC), weatherization, and inspection services. SoCalGas encourages contractors to hire from the communities they serve. Contractors document the home ZIP code for each enrollment program representative candidate that attends E&A training, using that information to determine the number of candidates from disadvantaged communities.

1.7.2 Please list the different types of training conducted and the various recruitment efforts employed to train and hire from the low income energy efficiency workforce.

In PY 2025, SoCalGas continued to provide various training courses including initial E&A, In-Home Energy Education, Natural Gas Appliance Testing (NGAT), refresher invoicing training, HEAT system, and ESA Mobile site training as well as training on the virtual enrollment process. These are all designed to provide thorough policy interpretation and general technical training to the ESA Program workforce. While all training courses convey the importance of the utility-specific requirements and expectations for customer interactions with participants, each course also supports the development of expert ESA Program knowledge at all levels and stages, from front line to back office, and from newly hired to tenured personnel. SoCalGas requires contractors to verify their employees conform to contract and industry standards indicative of the jobs and duties they must perform.

Potential ESA Program Representatives who will complete enrollments and home assessments as well as provide In-Home Energy Education must successfully pass the required SoCalGas E&A training and the Department of Justice background check. The online training covers utility-specific items related to policies, security processes, and overall customer service standards, as well as leveraging opportunities among other low-income programs, and the Energy Education module. A final exam must be passed and candidates who conduct in-person enrollments must be issued an active HISR license from the California State Licensing Board before being eligible to receive a SoCalGas badge.

In addition, to improve program delivery, the SoCalGas Customer Acquisition Team delivered refresher training to both contractors' back-office support staff and to program personnel responsible for completing program enrollments at contractors' local offices. Training was provided to all contractors upon request. These sessions address important program updates, provide an overview of new program requirements, and serve as a general refresher course for all participants. SoCalGas designed these workshops to improve the participants' understanding of the enrollment process and customer enrollment requirements.

SoCalGas Field Operations training includes initial in-person training for new participants in weatherization, inspections, HVAC and NGAT as well as refresher training for existing ESA Program personnel. These training courses are all designed to provide comprehensive policy and procedure training to its ESA Program workforce. In 2025, SoCalGas Field Operations continued conducting all initial training in weatherization, HVAC, and inspection services via an in-person format. Throughout 2025, Field Operations conducted 46 initial and refresher classes for 214 installers.

To promote safety, SoCalGas continued virtual contractor training to continue addressing specific issues affecting contractors' back-office personnel. SoCalGas worked closely with contractor back-office personnel by providing one-on-one support that enabled SoCalGas to better understand the challenges back-office personnel face and propose. The training curriculum helped SoCalGas better

assess contractor needs and assisted in tailoring training provided by SoCalGas to support the growth and development of the contractor workforce. In addition, SoCalGas developed a Reference Guide as a leave-behind after each invoicing training session. In 2025, SoCalGas hosted three invoicing training sessions (two virtual and one in-person), including hands-on, screen-share activity that enabled SoCalGas to provide real-time, personalized feedback.

1.7.3 For the ESA Program – Provide the following metrics related to WE&T in support of Commission’s effort to increase workforce opportunities for workers in disadvantaged areas.

Percent of incentive dollars spent on contracts with a demonstrated commitment to provide career pathways to disadvantaged workers.

For 2025, 100% of incentive dollars were spent on contracts with a demonstrated commitment to increase workforce opportunities for workers in disadvantaged communities, including the hiring of local disadvantaged workers, worker training, and career-ladder job development.

Number of Career & Workforce Readiness (CWR) participants who have been employed for 12 months after receiving the training.

In 2025, statewide, 38 CWR participants have been employed for 12 months after receiving training. This number does not include CWR participants who were employed in 2025 but did not meet the 12-months of employment criteria, or those who are still actively involved in training and have not yet been placed in jobs.

Percent of total WE&T training program participants that meet the definition of disadvantaged worker.

In 2025, SoCalGas's Integrated Energy Efficiency Training (IEET) program (SoCalGas's WE&T training program) conducted more than 160 training sessions both in-person and virtual, and approximately 160 Food Service (FS) outreach consultations/equipment demonstrations. These training classes reached over 8,200 participants, with more than 37% meeting the definition of a disadvantaged worker.

1.8 Studies

1.8.1 For each active Study, provide 1) a summary describing the activities undertaken in the study since its inception; 2) the study progress, problems encountered, ideas on solutions; and 3) the activities anticipated in the next quarter and the next year.

Please refer to Section 1.8.2 for ESA studies completed in 2025.

ESA Main Impact & Process Evaluation

In accordance with D. 21-06-015, the IOUs are conducting a comprehensive impact and process evaluation of the main ESA Program.

The primary objective of the impact evaluation is to develop robust ex post first-year kWh, kW, and therm savings estimates for ESA Main. Savings will be estimated:

- In aggregate;
- By fuel type;
- By IOU service area and fuel type;
- By average participating household;

- By measure and/or measure group; and
- Potentially with measure lifetime and program cycle benefits.

Where feasible, results will also be stratified by climate zone, housing type (single-family or mobile home), DAC status, participant status (new versus returning), and Tribal affiliation or residence within Tribal areas.

The evaluation will focus primarily on PY2024, which is the first full year the ESA Main program operated under its redesigned approach adopted through Decision 21-06-015. Under this redesign, the program shifted away from treating every eligible and willing household and instead began prioritizing homes and measures that are expected to deliver measurable energy savings.

Because PY 2024 reflects the early stage of this transition, some program processes and practices may still have been in the process of being rolled out or refined. If sufficient data are available, PY 2025 results may also be included to evaluate energy savings once the redesigned program has been fully rolled out and is operating more consistently under normal, steady-state conditions.

A complementary process evaluation will address three key research areas:

- **Benchmarking Study** — Compare the main ESA Program with similar low-income and market-rate whole-home energy efficiency programs to identify best practices in delivery models, cost-effectiveness, contractor relationships, enrollment strategies, measure offerings, and process efficiencies.
- **Leveraging Other Income-Qualified Programs** — Identify challenges and opportunities for integrating the main ESA Program with other income-qualified programs, improving referrals, tracking, and

co-enrollment strategies, and providing customers with clear guidance to choose the program(s) best suited to their needs.

- Customer Survey — Assess customer satisfaction, motivations, and barriers to enrollment.

The main ESA Program Impact & Process Evaluation launched its kickoff and began scope development in Q2 2025. The study team and the assigned ED lead met weekly through Q2 and Q3 2025 to refine the scope of work and develop the Request for Proposals (RFP). As the lead IOU, SoCalGas issued the RFP in October 2025, and solicitation activities continued through the end of the year.

In Q1 2026, the study team will convene to align on RFP scoring and select a third-party evaluator through a competitive process. The final study results are expected to be delivered in Q4 2027.

1.8.2 For studies that concluded in 2025, submit a Final Study Report describing: 1) Overview of study; 2) Budget spent vs. authorized budget; 3) Final results of study; and 4) Recommendations.

The table below provides an overview of the ESA Program studies that SoCalGas and/or the IOUs completed in 2025. Budgets associated with these authorized studies are provided in ESA Program Table 14 – Expenditures for Pilots and Studies.

ESA Program Table 1.8.2.1 ESA Program Studies				
Study	Lead Consultant	Contracting IOU	Project Initiation	Project Completion
2025 Low Income Needs Assessment (LINA) ²⁸	Evergreen Economics	SoCalGas	Jan 2024	Oct 31, 2025
2025 ESA Non-Energy Impacts (NEI) Study ²⁹	Evergreen Economics	SCE	Feb 2024	Jun 2025

2025 Low Income Needs Assessment (LINA) Study

The Low Income Needs Assessment (LINA) is a mandated study required every three years under Assembly Bill (AB) 327 and Public Utilities Code (PUC) §382(d). The 2025 LINA Study was completed and posted to the Public Document Area (PDA) site on October 31, 2025. Its primary objective is to deepen understanding of the needs of households with unusually high or low energy usage and to assess how the ESA Program can better support these customers.

The 2025 study was completed within its approved scope and budget and provides a comprehensive view of usage patterns, household characteristics, and opportunities to strengthen ESA Program offerings. The analysis combined customer billing and demographic data, a statewide survey of CARE and FERA participants, and multilingual focus groups to reflect the diverse experiences of customers across climate zones, housing types, and language communities.

²⁸ The 2025 LINA study was authorized in Ordering Paragraph (OP) 167 under D.21-06-015 for \$500,000. The final project budget was \$499,911, of which SoCalGas is responsible for a 25% cost share.

²⁹ The 2025 ESA NEI Study was authorized by D.21-06-015 in the amount of \$500,000 (OP 172). Budget spent on the project was \$449,469, of which SoCalGas’s cost share is 25%.

Findings reveal clear differences between high and low usage households.

- High-usage customers commonly live in larger single-family homes, have more occupants, and rely on older or less efficient heating and cooling equipment particularly in hotter climate zones. Many also depend on medical devices that increase energy demand.
- Low-usage households tend to live in smaller homes or apartments and often practice strong conservation behaviors sometimes to the point of discomfort or unsafe actions, such as using ovens for heat or severely limiting heating or cooling to unhealthy levels.

Across both groups, customers consistently expressed a desire to keep bills low and often felt they were already doing everything possible. The study also highlighted ongoing language access and program navigation challenges especially for Cantonese-, Vietnamese-, and Spanish-speaking households which can reduce awareness and understanding of available programs and services.

Key recommendations include continuing to upgrade equipment for high usage households, evaluating secondary heating and cooling systems, and exploring additional appliance offerings where appropriate. For low usage households, the study underscores the need for safety focused education and clearer, culturally relevant conservation messaging tailored to different living situations.

Strengthening language outreach, expanding partnerships with community-based organizations, and coordinating with the Community Help and Awareness of Natural Gas and Electricity Services (CHANGES) program will improve engagement throughout the customer journey.

Overall, the 2025 LINA offers clear, actionable guidance to refine ESA Program design and delivery, ensuring assistance continues to meet the health, comfort,

and affordability needs of California's low-income households.

2025 ESA Non-Energy Impacts (NEI) Study

The 2025 ESA Program Non-Energy Impacts (NEI) Study was completed and posted to the Public Document Area (PDA) site on June 18, 2025, as directed by the CPUC in D.21-06-015. The purpose of the study was to update California's specific valuations for HCS benefits associated with ESA Program measures. The methodology combined a comprehensive literature review with a large statewide web survey consisting of 865 ESA Program participants who received treatments in PY 2023 and Q1 2024 and 438 comparison households (CARE/FERA customers not treated since 2018). Surveys were administered in English and Spanish based on respondent preference, and participants were provided a \$25 incentive. Statistical analysis included regression and conjoint modeling which were used to estimate both the frequency of reported comfort and noise improvements and their updated monetary values while controlling for factors such as weather variation.

Stakeholder engagement occurred throughout the study. The proposal was reviewed with the ESA Program/CARE Study Working Group in early 2024, and a revised research plan was shared in a public webinar in July 2024. Interim updates were provided through the Working Group, and draft findings were presented during a public workshop in May 2025 prior to final publication.

The study found that ESA Program participants, on average across all IOUs, received an estimated \$9 in comfort NEIs and \$1 in noise NEIs from ESA Program participation in PY 2023 and Q1 2024. These updated nonenergy benefit values have been incorporated into the latest IOUs' NEBs Tool and are being applied in Energy Savings Assistance Cost Effectiveness Test (ESACET) reporting, including the PY 2028–2033 Income Qualified Programs Application. A follow-up memo to the low-income service list showed that applying the updated comfort and noise values to PY 2023 program data reduced total Non-Energy Benefit (NEB) valuation by approximately 16% on average, noting that results vary based on each IOU's measure mix and program year.

While the study successfully updated comfort and noise valuations, it could not directly quantify broader health or safety related NEIs due to the limitations of survey-based data collection. The IOUs have proposed a subsequent study for PY 2028–2033 to assess a wider set of health and safety benefits using additional methods.

In summary, the 2025 NEI Study provides updated, California-specific valuations of comfort and noise benefits delivered by the ESA Program and strengthens the accuracy and consistency of non-energy impacts reflected in ESA Program cost-effectiveness reporting.

1.9 Pilots

1.9.1 For each active Pilot, provide 1) a summary describing the activities undertaken in the pilot since its inception; 2) the pilot progress, problems encountered, ideas on solutions; 3) the activities anticipated in the next quarter and the next year; and 4) Status of Pilot Evaluation Plan (PEP).

Pilot Plus/Deep (ESA Whole Home)

In accordance with D.21-06-015, Attachment 2, SoCalGas and SCE continue to jointly implement the ESA Whole Home Pilot to streamline customer experience, reduce administrative complexity across the shared service territory, and provide a comprehensive package of gas and electric measures to eligible CARE customers. The pilot's coordinated design supports a more comprehensive approach to energy savings and customer comfort by integrating both utilities' offerings under a single enrollment and installation pathway.

Process Evaluation

Throughout 2025, the evaluation team advanced a wide range of process and impact evaluation tasks designed to understand customer experiences, barriers to enrollment and the pilot's overall performance. These efforts included:

- **Contractor Interviews:**
A second round of interviews was completed to capture contractor insights on pilot delivery, customer barriers, and recommendations for improving field operations. Findings were summarized in an interim memo.
- **Participant Interviews:**
Interviews were conducted with customers at various points in the participation including newly enrolled customers and those with completed installations, to understand perceptions of the process, drivers of customer satisfaction, and other customer experience outcomes not captured through quantified non-energy benefits (NEBs). Two case studies were developed to highlight customer experience.

- **Nonparticipants Survey:**
A full wave of surveys was completed with eligible customers who did not participate, providing insight into awareness gaps, outreach effectiveness, and persistent enrollment barriers.
- **Post Installation Survey:**
The evaluation team continued to field post install surveys (six months after installation) to assess NEBs, participant satisfaction, and persistence of benefits. These results were provided through ongoing check-ins.

Across all research components, 2025 findings reinforced several key themes:

customer enrollment remained challenging despite pilot improvements, contractors continued to encounter outdated contact information and limited customer responsiveness, and additional refinements to eligibility targeting and outreach strategies were recommended to improve participant conversion.

Additionally, new immigration law enforcement activity within our service territory hindered customer participation, amplifying concerns and eroding trust in the program.

Impact Evaluation

In support of the impact evaluation, the evaluation team also continued reviewing the logic model, program theory, and evaluability criteria. Given participation levels, the impact evaluation approach was refined to characterize installations to date, develop an appropriate matched control group, and prepare for a difference indifference analysis for the limited number of completed installations.

While scaled back from the original plan, the 2025 work made certain that the evaluation framework remains robust and aligned with the smaller participant population.

Planned Activities

In 2026, evaluation activities will focus on completing post installation surveys, conducting a final set of contractor and participant interviews, continuing annual reviews of the program theory and evaluability, and preparing impact and process results for inclusion in the draft and final reports.

The evaluation is expected to deliver its full findings including updated impact results, process lessons learned, and recommendations for any future program design by Q4 2026, consistent with the approved timeline.

1.9.2 For pilots that concluded in 2025, submit Final Pilot Report describing: 1) Overview of pilot; 2) Description of Pilot Evaluation Plan (PEP); 3) Budget spent vs. authorized budget; 4) Final results of pilot (including effectiveness of the program, increased customer enrollments or enhanced program energy savings); and 5) Recommendations.

There were no Pilots concluded in 2025 for SoCalGas.

1.10 ESA Working Group (WG) and Sub-working Groups (SWG)

1.10.1 Please provide a brief background on each WG and SWG.

ESA WG

D.21-06-015 specified the requirement for the IOUs to establish an ESA WG with multiple sub-groups to address a diverse set of program operations and improvements; one of the guiding principles being to provide energy savings and hardship reduction to low-income households in line with IOU program goals.

The ESA WG held its first kick-off meeting in January 2022 and since then, the

group has been meeting six times a year to address specific subjects and/or deliverables with rotating SWG discussions.

The ESA WG functions were initially divided into the ESA Council and three SWGs: ESA Program CE SWG, ESA Program Policy & Procedures and Installation Standards Manuals (PP&IS) SWG, and Universal Application System (UAS) SWG. D.22-12-029 added the CARE/ FERA Program PEV SWG to expand the SWGs from three to four for PY 2023.

The ESA WG operates with specific guiding principles that are outlined in the Charter and Governance documents, and once the planned SWG tasks are completed, the SWG members delegate the SWG charter back to ESA WG. Prior to 2025, three of the four SWGs were completed: the CARE/FERA PEV SWG in 2024, the ESA Program CE SWG in 2023 and the UAS SWG in 2022.

CARE/FERA PEV SWG

This SWG was tasked with developing recommendations for improving the income verification procedures policies. This SWG was open to the public and supported by selected ESA WG Members. Although this SWG ended activity at the close of the PY2023, the IOUs didn't present their conclusive annual findings until the ESA WG June Public Meeting in 2024, officially completing this SWG.

Status: Completed in 2024

PP&IS SWG

The statewide PP&IS SWG discusses and recommends revisions to the P&P Manual and IS Manuals and conducts an initial assessment of "healthy building materials" and reviews proposed revisions to Main ESA and MFWB measures. Since 2022, this SWG has held public meetings and is supported by selected ESA WG Members. This SWG meets on the second Wednesday every other month, is open to the public and accepts new participants.

Status: Ongoing into 2026.

1.10.2 What were the accomplishments of each WG and SWG in PY 2025?

2025 ESA WG

In 2025, the ESA WG grew to twelve non-IOU members, comprised of contractors and non-profit organizations and retained four IOU members and one ED representative. The ESA WG completed six statewide public meetings throughout 2025, capturing the interest of more than 400 total attendees including ESA WG IOUs, non-IOU member organizations and the public. Throughout the six public meetings, the ESA WG presented a combination of annual and monthly reports as outlined in the decision, as well as additional meeting topics as suggested by stakeholders. In addition to the public and council meetings held, two additional meetings were held in collaboration with the ED to help further achieve the objectives outlined in the decision and Charter: the Multi-Family workshop and the TECH Low Income Electrification Findings presentation. The Multi-Family workshop was held to discuss the MFWB program model and multifamily-specific challenges while the TECH Clean California team presented

insights and analysis on the benefits, opportunities, and strategies for advancing low-income electrification for ESA Program-eligible customers, specifically focusing on heat pump deployment in alignment with both programmatic and state heat pump adoption goals.

Ongoing opportunities for growth identified during the 2025 PY included balancing HCS and energy savings measures; ESA Program workforce development planning, training, and recruitment; outreach and marketing adaptations for contractors; permit acquisition and inspection delays; Multi-Family Whole Building program challenges; and program lessons learned as new Full Cycle Applications are prepared. The WG has discussed and set goals for the 2026 PY including a list of priority topics and objectives to address the challenges faced in 2025.

In addition to delivering annual and monthly reports as outlined in the decision, the ESA WG collaborated on several additional items including but not limited to:

- The annual Clean Energy workshop;
- Income Qualified Program (IQP) California Energy Data and Reporting System (CEDARS) updates;
- Pilot Program budget(s);
- Northern and Southern Multi-Family programs;
- Income qualified potential and goals study report results;
- ESA Program workforce development;
- Pacific Gas & Electric (PG&E) FERA barriers studies;

- ESA Program building electrification pilot advice letter (AL);
- Full cycle applications; and
- Contractor experiences with city permitting process, marketing and outreach.

2025 PP&IS SWG

The PP&IS SWG continued executing its core function throughout 2025 including revisions and updates to program manuals, updates to PP&IS measure specifications to include polices and installation standards and modifications, and revisions to the charter. The SWG met bi-monthly and provided updates and/or presentations in five out of six ESA WG public meetings.

2025 accomplishments for this SWG include but are not limited to the following:

- Released two revisions of statewide ESA program P&P manual;
- Completed one revision of IS Manual (v.1.5);
- Released two revisions of MFWB Program P&P Manual;
- Completed one revision of Measure Spec Manual (v4.0);
- Provided loading order (LO) guidance to ESA WG Council and ED;
- Developed infographic document detailing partial electrification's effects on the pressure dynamics of a home and examples of when NGAT may be needed;
- Developed decision tree outlining when combustion appliance testing is needed during electrification; and
- Developed guidance document regarding upgrading and sizing the main distribution panel.

1.11 Annual Public ESA Program and CARE Meeting

D.12-08-044 ordered the IOUs to convene a minimum of one public meeting per year, within 60 days of their filing of the annual report, and other public meetings as deemed necessary by the IOUs, the ED, the Administrative Law Judge (ALJ) or the Commission. Additionally, IOUs were directed to use these meetings as a forum to host the working groups.

In compliance with D.12-08-044, SoCalGas and the IOUs held a webinar meeting on August 28, 2025 in conjunction with the ESA Working Group meeting. There, the IOUs presented an overview of their 2024 CARE and ESA Programs results.

The IOUs presented program statistics, enrollment findings, general activities, outcomes and lessons learned. Among these topics, a variety of other IOU-specific updates were provided including but not limited to marketing and outreach as well as customer engagement. The public meeting format provided an opportunity for a robust discussion and Q&A with stakeholders.

1.12 Multifamily Properties

1.12.1 The IOUs shall conduct and report an annual analysis of the square footage, energy consumption, ESA Program participation and time since the last retrofit of non-deed restricted multifamily properties with a high percentage of low income tenants. Please include the breakdown of market rate and deed restricted properties treated.

This process is managed by the third-party implementer, RI and is overseen by the IOU administrator SDG&E.

1.12.2 The IOUs shall describe the activities conducted in multifamily properties for multifamily common area measures under the ESA Program.

This process is managed by the third-party implementer, RI and is overseen by the IOU administrator SDG&E.

1.12.3 The IOUs shall conduct and report an annual Normalized Metered Energy Consumption (NMEC) analysis of the multifamily common area initiative

I. Introduction / Key Findings and Recommendations

SoCalGas contracted Recurve Analytics, Inc. to perform the normalized energy use analysis for the reporting purpose in this Annual Report. The report titled, “Metered Performance of the SoCalGas ESA Program Multifamily Common Area Measures” by Recurve Analytics, contains results and recommendations from the backcast of the SoCalGas ESA Program Multifamily Common Area Measures projects (ESA CAM). This backcast analyzes nine projects completed between July 2024 and December 2024. Across the portfolio, projects achieved approximately 12,024 therms of savings in the first 12 months of performance, representing about 18% savings relative to counterfactual consumption, with all projects delivering positive savings. Overall, the results indicate that the installed equipment upgrades consistently reduced gas consumption across the portfolio. Savings were observed across projects of varying sizes and equipment configurations, indicating the robustness of the measures implemented through the ESA CAM program.

In a backcast, Recurve assesses savings by measuring changes in NMEC that customers experience after program participation. The backcast analysis provides actionable insights into program outcomes, particularly as they relate to meter-based performance. For this backcast, Recurve uses the OpenDSM Hourly methods to measure gas savings at each enrolled meter. The meter-level results are then aggregated to produce project and portfolio-level savings estimates.

In SoCalGas’s ESA CAM projects, customers receive upgraded equipment. New systems are installed by a participating contractor. Depending on the multifamily housing configuration these systems may serve common areas that are separate from the housing units themselves or may also serve building tenants. Table 1 summarizes project-level savings results, installed measures, and installation dates.

Table 1: Backcast results by project

Project	Reporting Year 1 Savings (therms)	Reporting Year 1 Counterfactual (therms)	Reporting Year 1 % Savings	Measures Installed	Installation Date
Ashwood Court Apartments	1,059	6,300	16.8%	Central Domestic Hot Water Boiler & Water Heater Tank and Pipe Insulation	12/5/24
Bonnie Brae	3,752	11,428	32.8%	Central Domestic Hot Water Boiler	12/20/24
Heninger Village Apartments	516	5,463	9.4%	Central Domestic Hot Water Boiler	11/15/24
Hollywood Fountain North	1,013	7,611	13.3%	Central Domestic Hot Water Boiler & Demand Control DHW Recirculation Pump & Water Heater Tank and Pipe Insulation	7/31/24
Hollywood Fountain South	1,556	5,939	26.2%	Central Domestic Hot Water Boiler & Demand Control DHW Recirculation Pump & Water Heater Tank and Pipe Insulation	7/31/24
La Mirada Vistas	1,268	6,865	18.5%	Central Domestic Hot Water Boiler & Water Heater Tank and Pipe Insulation	12/26/24
Miracle Terrace	1,662	10,702	15.5%	Storage Water Heater	11/7/24
Noble Pine Apartments	1,090	11,911	9.2%	Water Heater Tank and Pipe Insulation	11/19/24
Palo Verde Apartments	106	704	15.1%	Storage Water Heater & Tankless Water Heater & Water Heater Tank and Pipe Insulation	12/19/24
Totals 9 Projects	12,024	66,923	17.97%		

II. Methods and Data Summary

Recurve utilized the OpenDSM Hourly methods and open-source code-base to conduct all savings calculations presented in this backcast. The OpenDSM Hourly model is a Time-of-Week and Temperature (TOWT) model and operates using a temperature-binning scheme of up to seven distinct bins. The model is piecewise linear across the bins. The model is also weather-normalized and captures time-of-week usage patterns depending on hourly usage patterns. The OpenDSM Hourly methods are described in full detail at <https://opensdm.energy>. In measuring savings, Recurve first establishes a model based on the 365 days leading up to program participation. This time period is known as the “baseline” period and the model as the “baseline” model. Recurve then projects this model into the 365-day period following program participation (the “reporting” period) applying the temperature data of the reporting period. This model projection, known as the “counterfactual” represents the estimation of hourly energy usage that would have occurred in the absence of program intervention. The difference between this counterfactual and actual consumption is taken as the savings attributable to the program. This process is completed for each meter and results are aggregated as needed to analyze different segments of the population.

Recurve screens for a number of potential issues with meter data, models, and results (e.g., insufficient baseline data, poor model fit, savings outliers, etc.). If a project triggers any of these predesignated thresholds, then projects are flagged and removed from measurement. To maintain transparency, Recurve reports on

these disqualifications, and in the case of the 2024 SoCalGas ESA Program CAM portfolio, there were no disqualifications across the nine meters/projects.

III. Figures

Figure 1 below shows the therms savings results plotted against predicted consumption for all qualified projects in the portfolio. As one would expect, there is a general upward trend in savings as a function of usage, which extends from smaller projects to the largest project in the portfolio. Overall, there are no projects with negative savings.

Figure 1: Savings vs. Predicted Usage for ESA CAM Meters

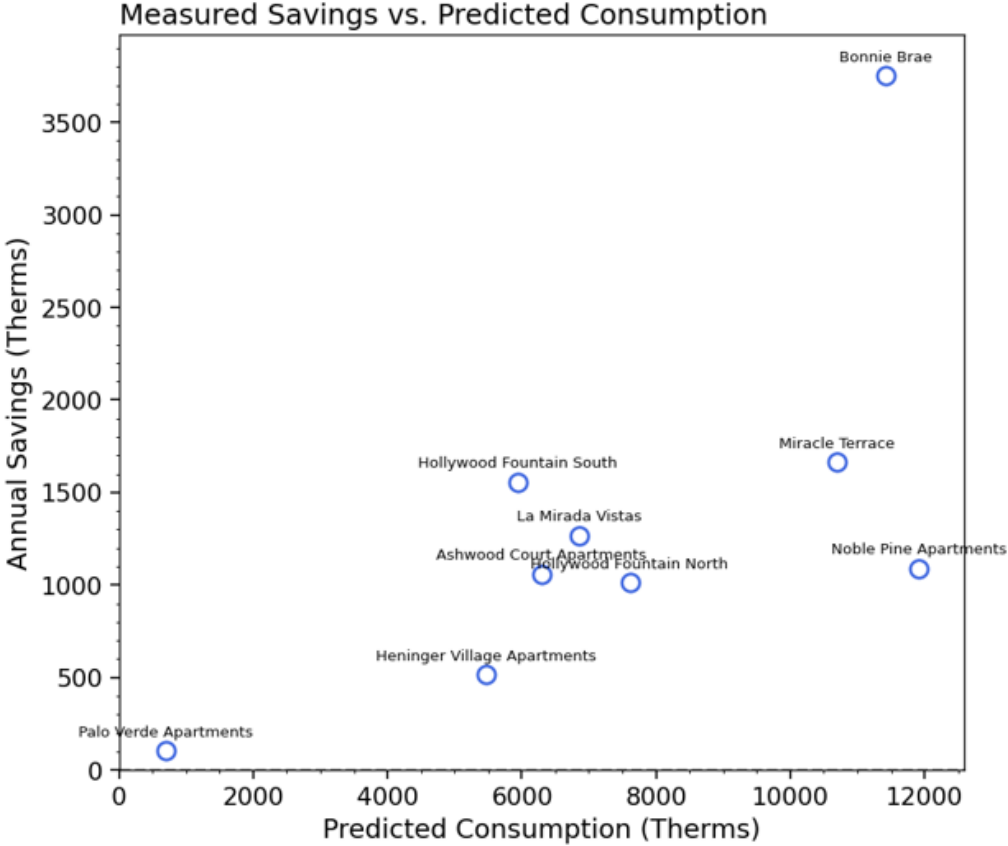


Figure 2 below shows the therms savings results plotted against fractional savings (i.e., percent savings relative to the counterfactual) for all qualified projects in the portfolio. Percent savings range from approximately 9% to 33%, with an overall average of about 18%. Projects with similar predicted consumption and measure packages exhibit varying percent savings levels, suggesting that project performance is influenced by site-specific conditions rather than a single dominant factor. Overall, the results demonstrate consistent positive savings across all projects.

Figure 2: Percent Savings vs. Predicted Usage for ESA CAM meters

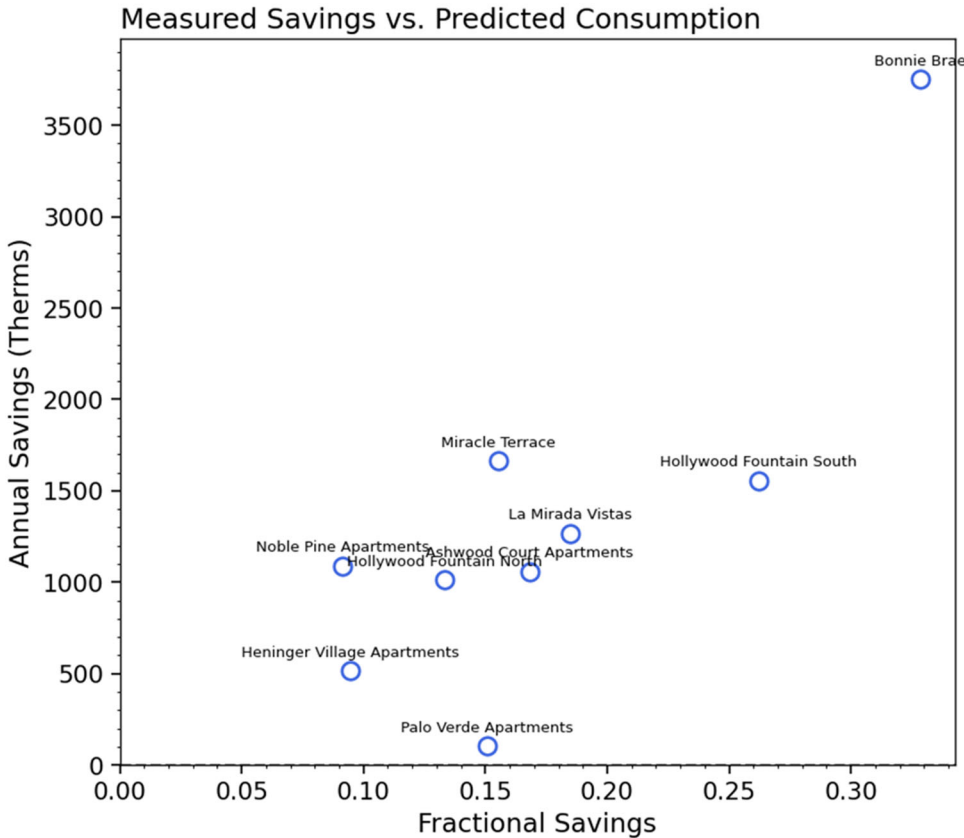


Figure 3 below shows the distribution of savings across the ESA Program CAM portfolio on both an absolute (therms) and normalized (percent) basis. The therms

savings distribution reflects the variation in project size and hot water demand across the portfolio, with higher absolute savings generally associated with projects with larger predicted consumption.

The percent savings distribution shows a moderate variation in performance, with most projects clustered around the portfolio average of approximately 18%. While a small number of projects achieved higher fractional savings, the majority of projects fall within a relatively narrow range of outcomes.

Overall, the distributions indicate consistent positive savings across the portfolio, with no projects exhibiting negative performance and no extreme outliers driving the portfolio-level results.

Figure 3: Savings Distribution for ESA CAM Projects

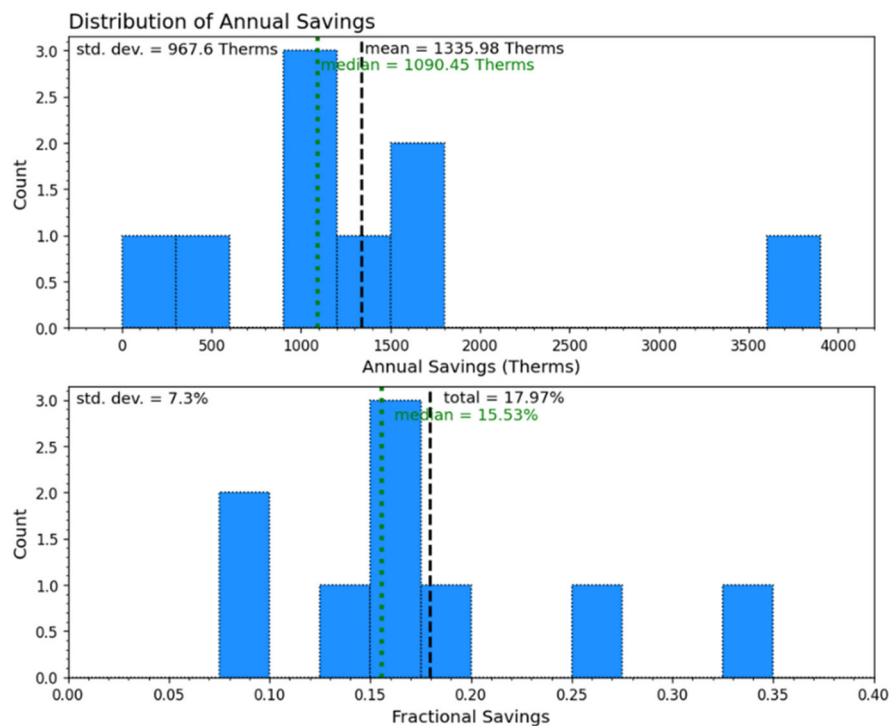
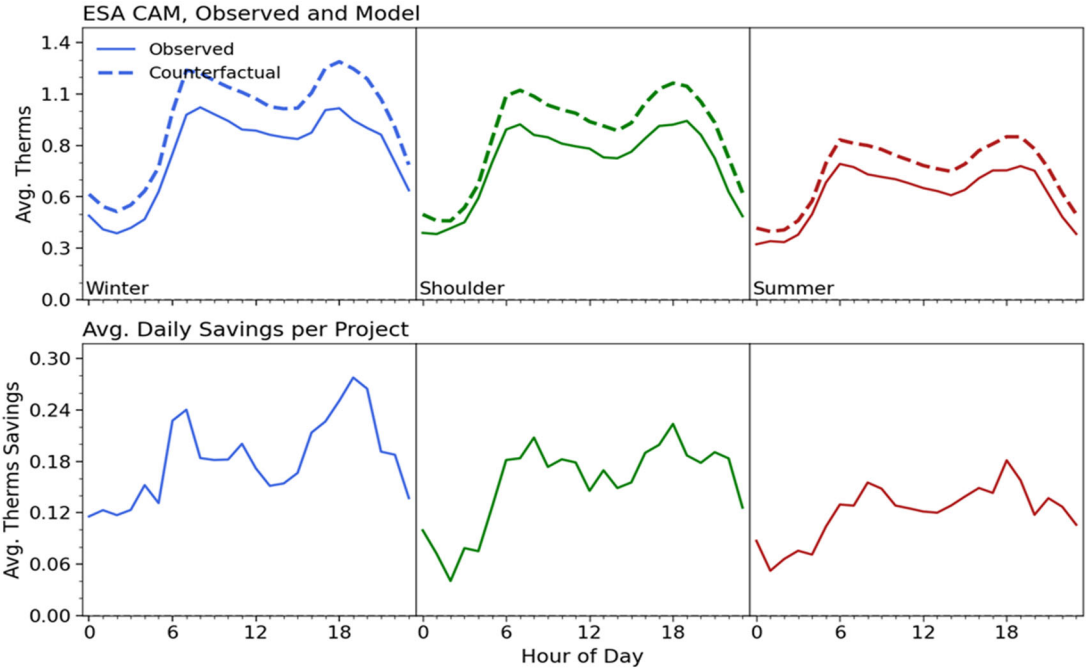


Figure 4 below shows the average daily observed and counterfactual gas load shapes (upper) and savings (lower) for each season for the entire portfolio of 2024 enrolled projects. The observed load profiles generally follow the predicted usage patterns across the day, though with consistently lower consumption during the reporting period, reflecting the impact of the installed measures. Savings are observed across most hours of the day, suggesting that the installed domestic hot water equipment improvements reduce gas consumption throughout normal operating periods rather than concentrating savings in a single-time window. The hourly profiles generally follow the expected pattern of domestic hot water demand, with higher usage during morning and evening periods and lower consumption overnight. Overall, the results show consistent reductions in gas usage across the daily load profiles, suggesting steady operational efficiency improvements across the portfolio.

Figure 4: Hour of Day Results by Season - Entire Portfolio

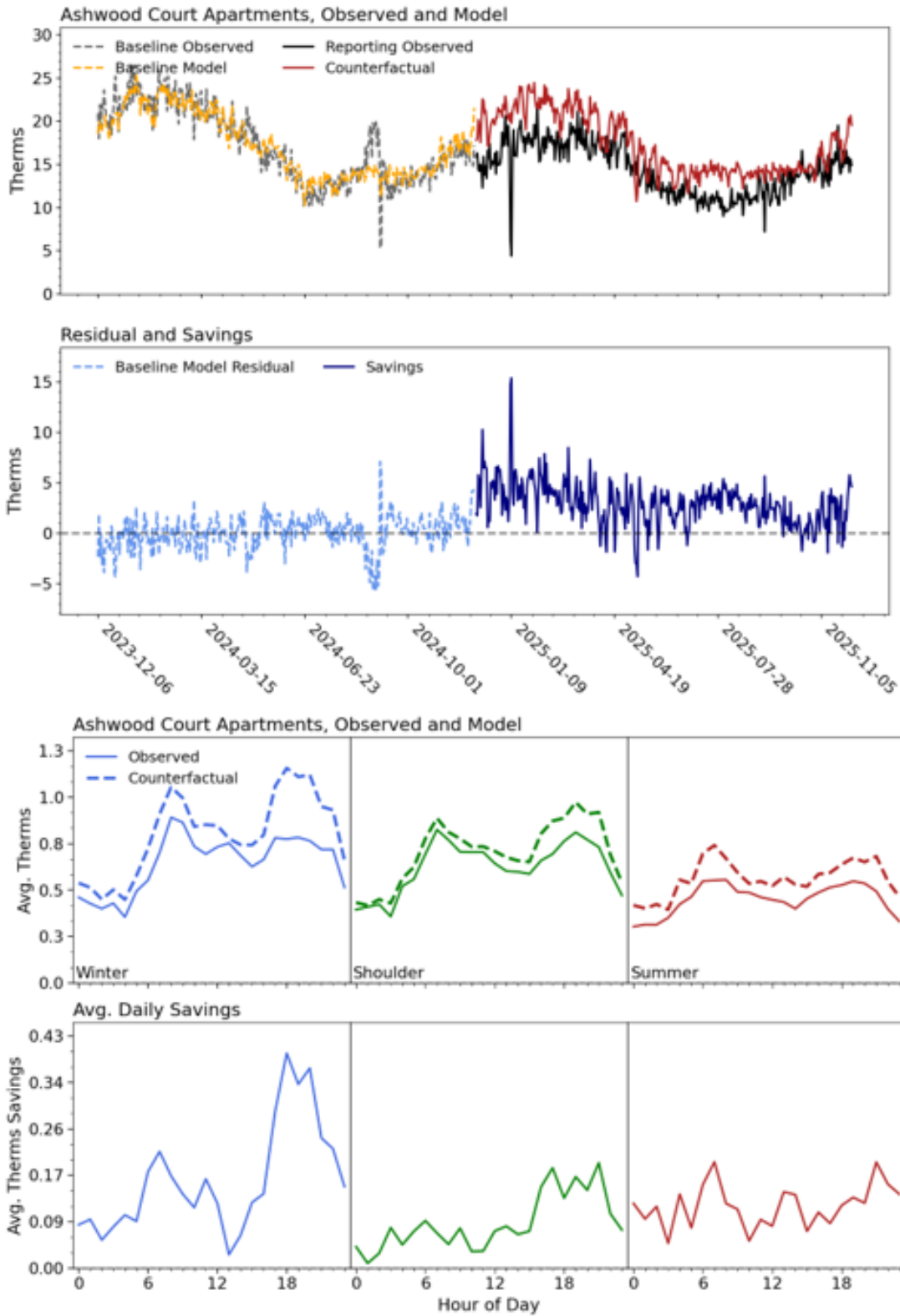


IV. Individual Project Analysis

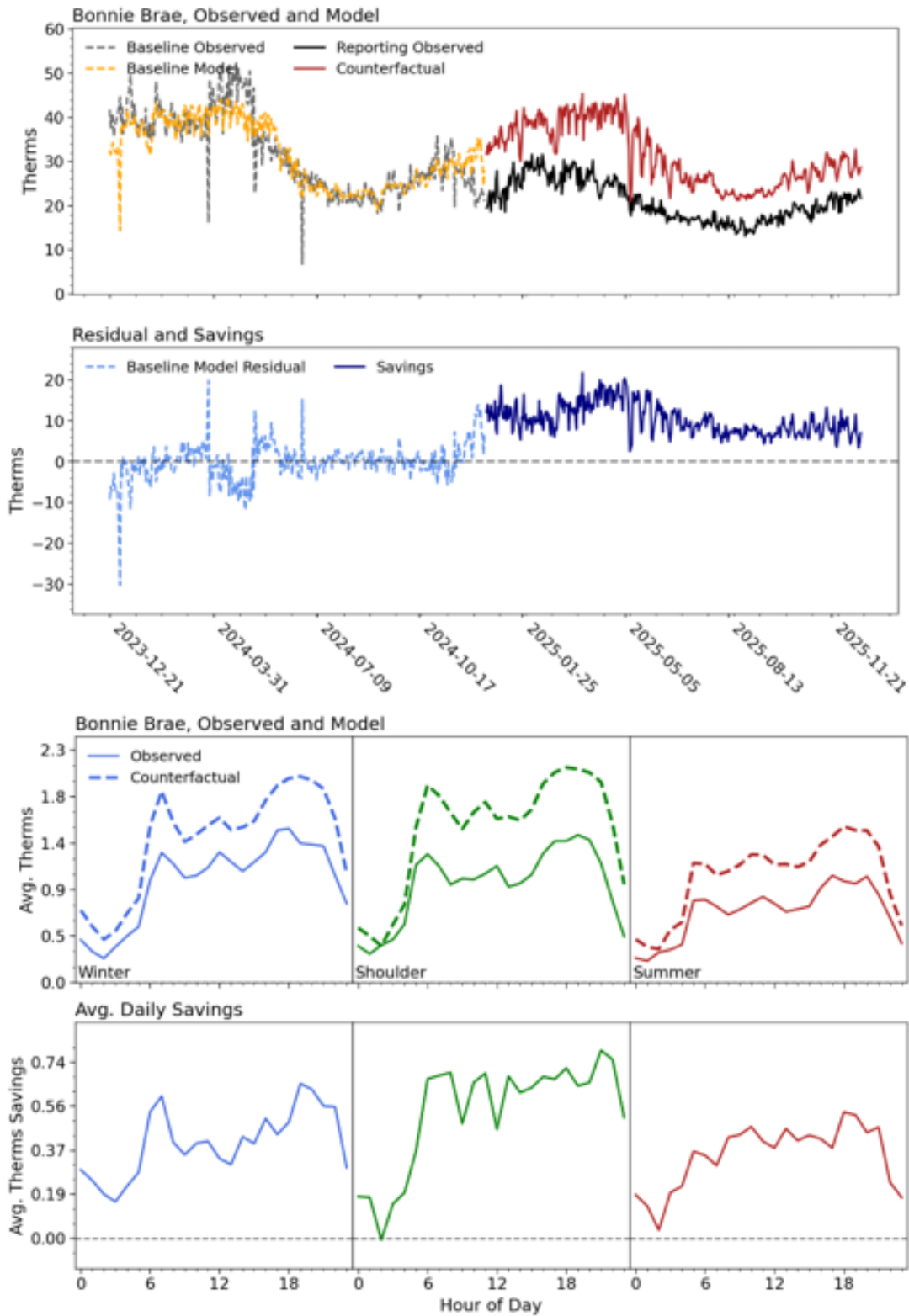
The following figures present project level analysis across four graphs, with one project presented per page:

1. **Annual Load Shapes:** The top graph shows the daily observed and model (counterfactual) gas load shapes for the project during the baseline and reporting year.
2. **Annual Savings:** The second graph shows the daily observed gas savings during the reporting year. Differences during the baseline period represent model residuals rather than program savings.
3. **Seasonal Load Shapes:** The third graph shows the average daily gas load shape at hourly resolution for each season, comparing observed and counterfactual consumption.
4. **Seasonal Savings:** The fourth and final graph shows the average daily savings at hourly resolution for each season.

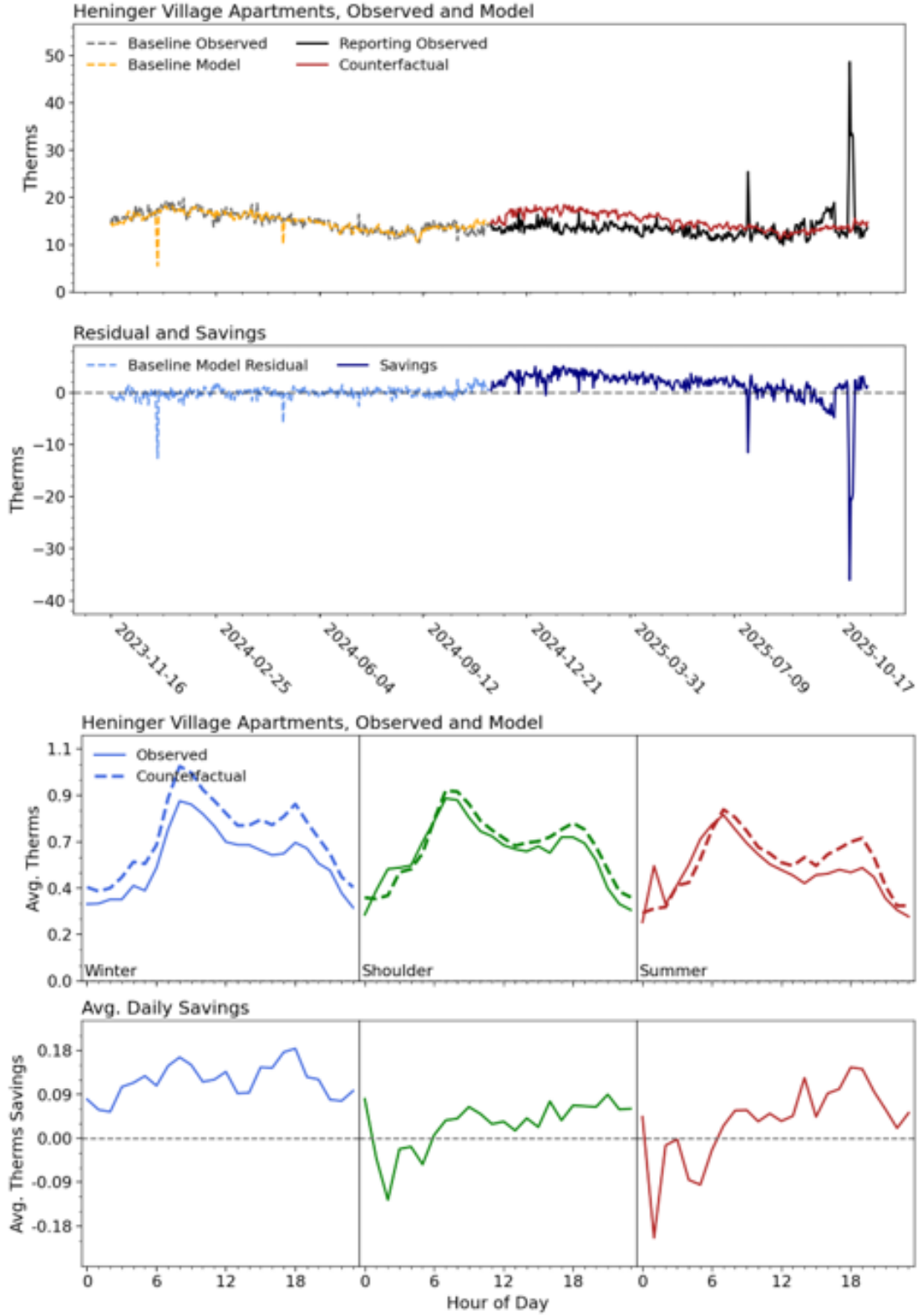
Ashwood Court Apartments: 1,059 therms saved (16.8%)



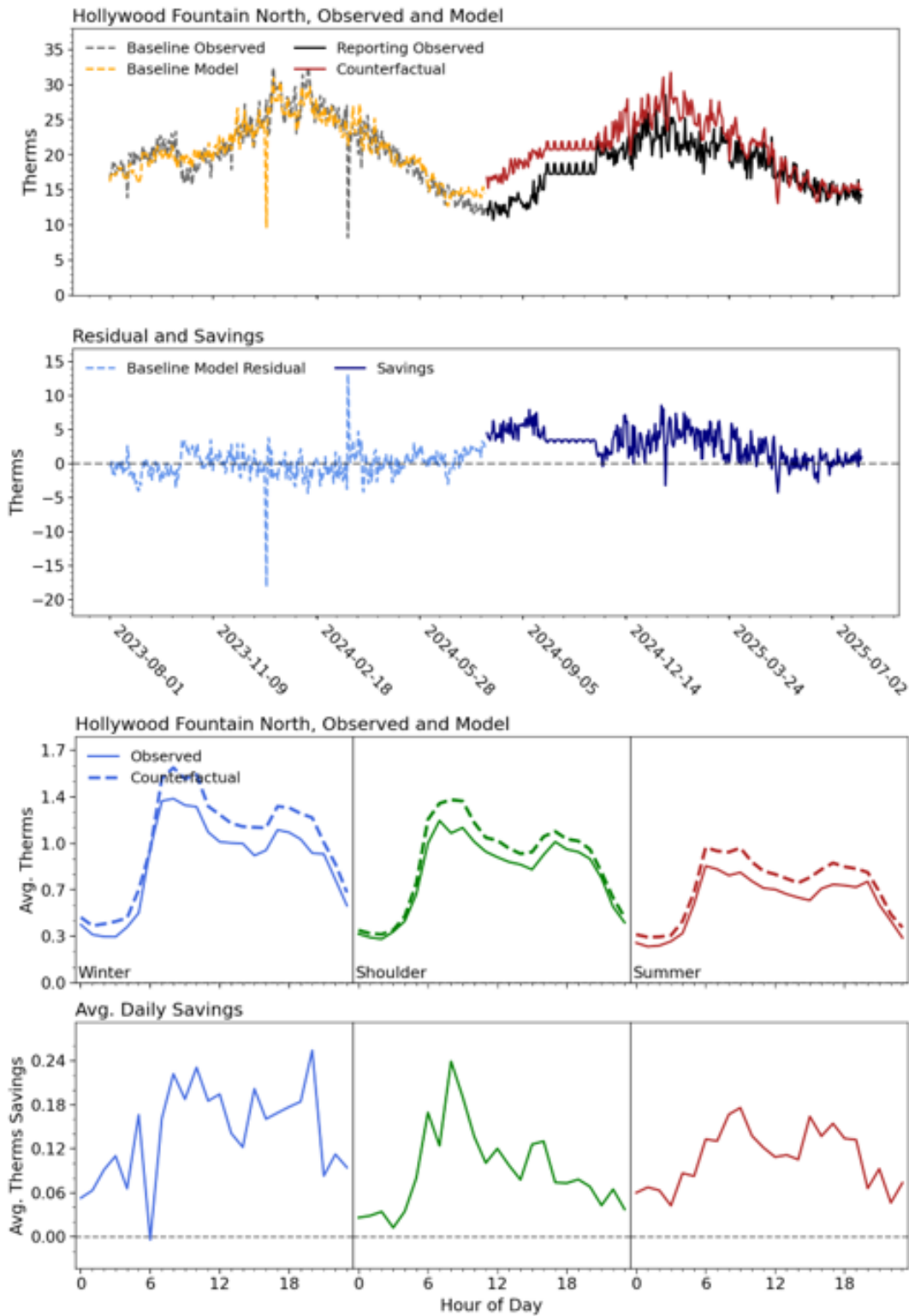
Bonnie Brae: 3,752 therms saved (32.8%)



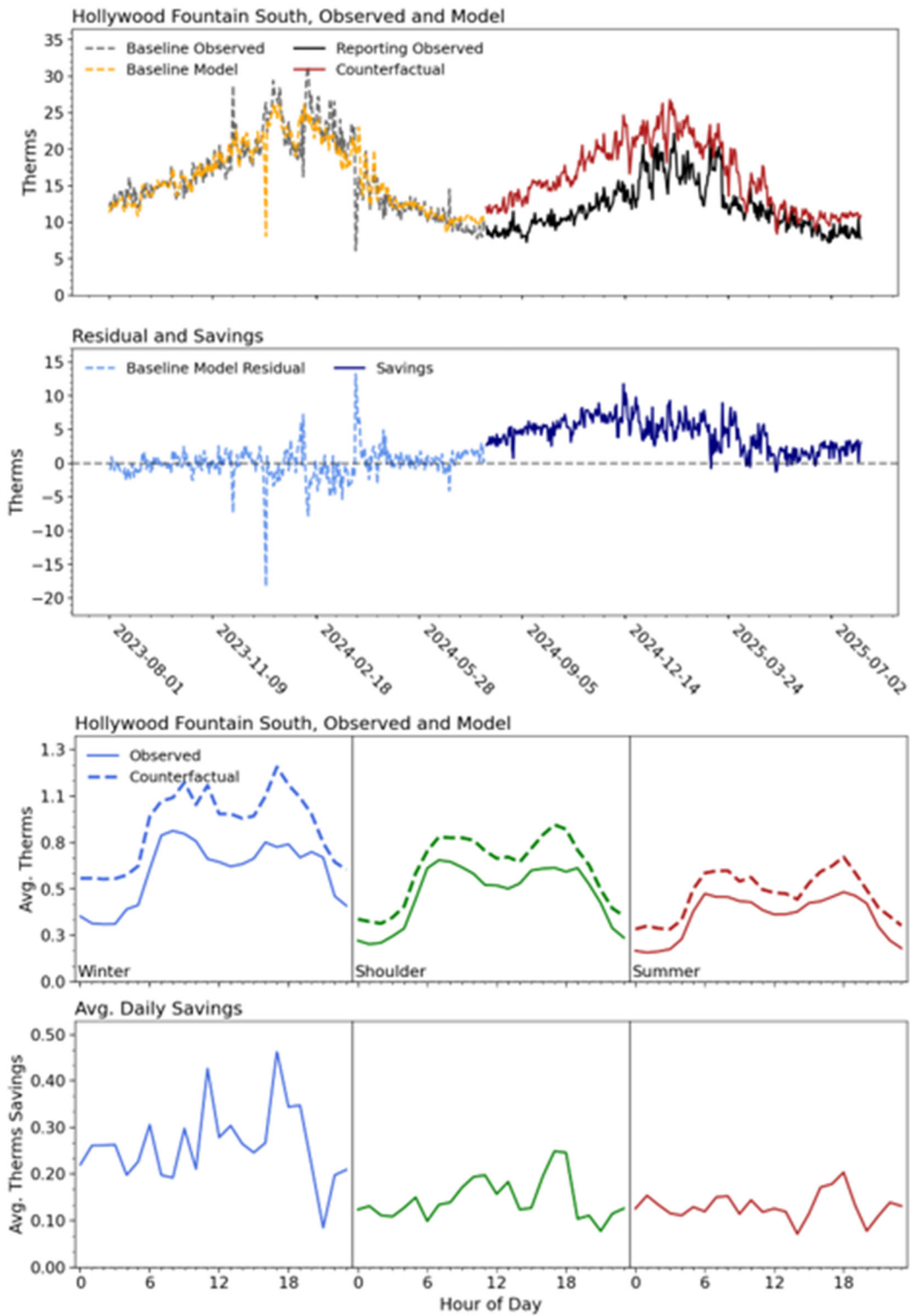
Heninger Village Apartments: 516 therms saved (9.4%)



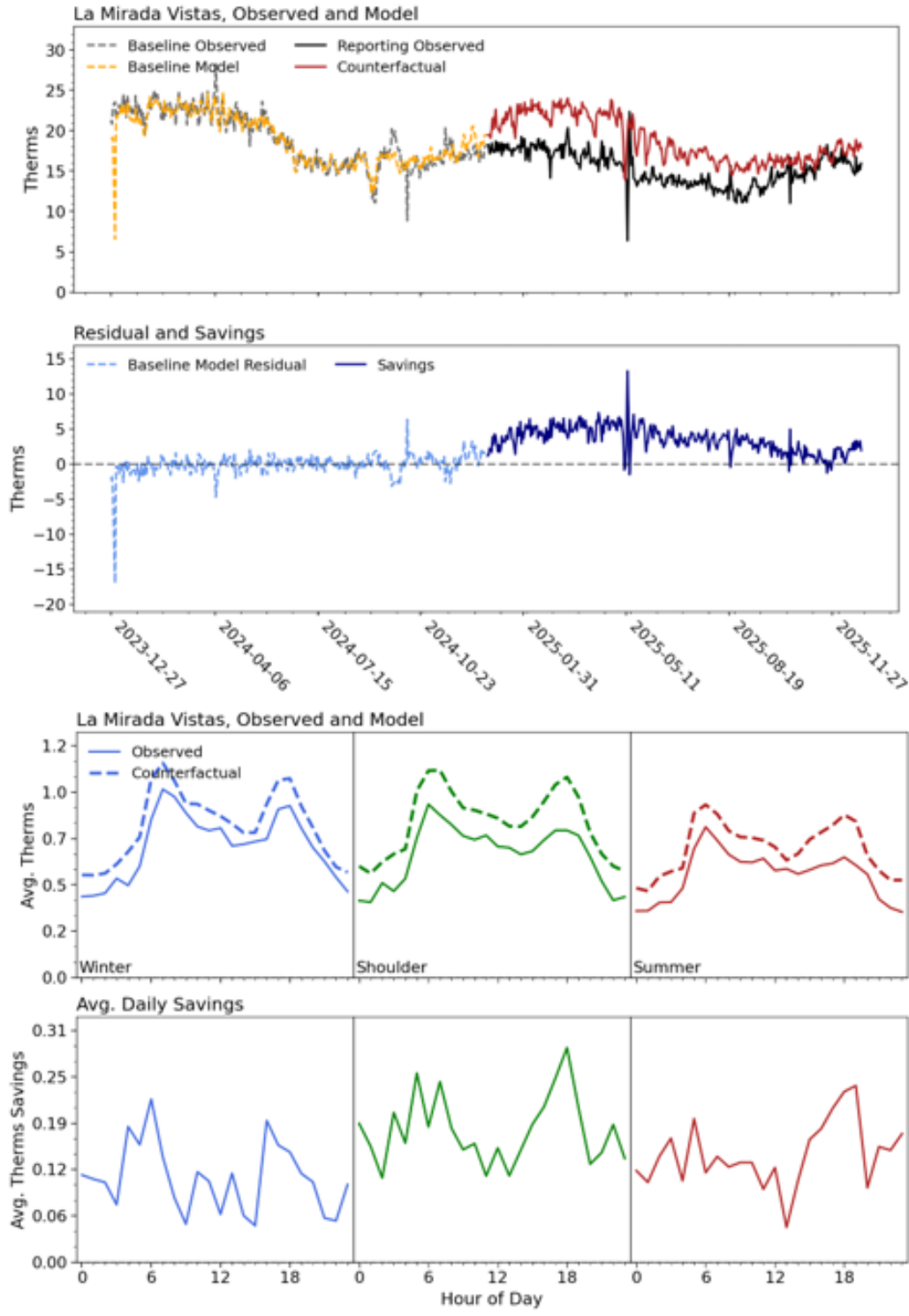
Hollywood Fountain North: 1,013 therms saved (13.3%)



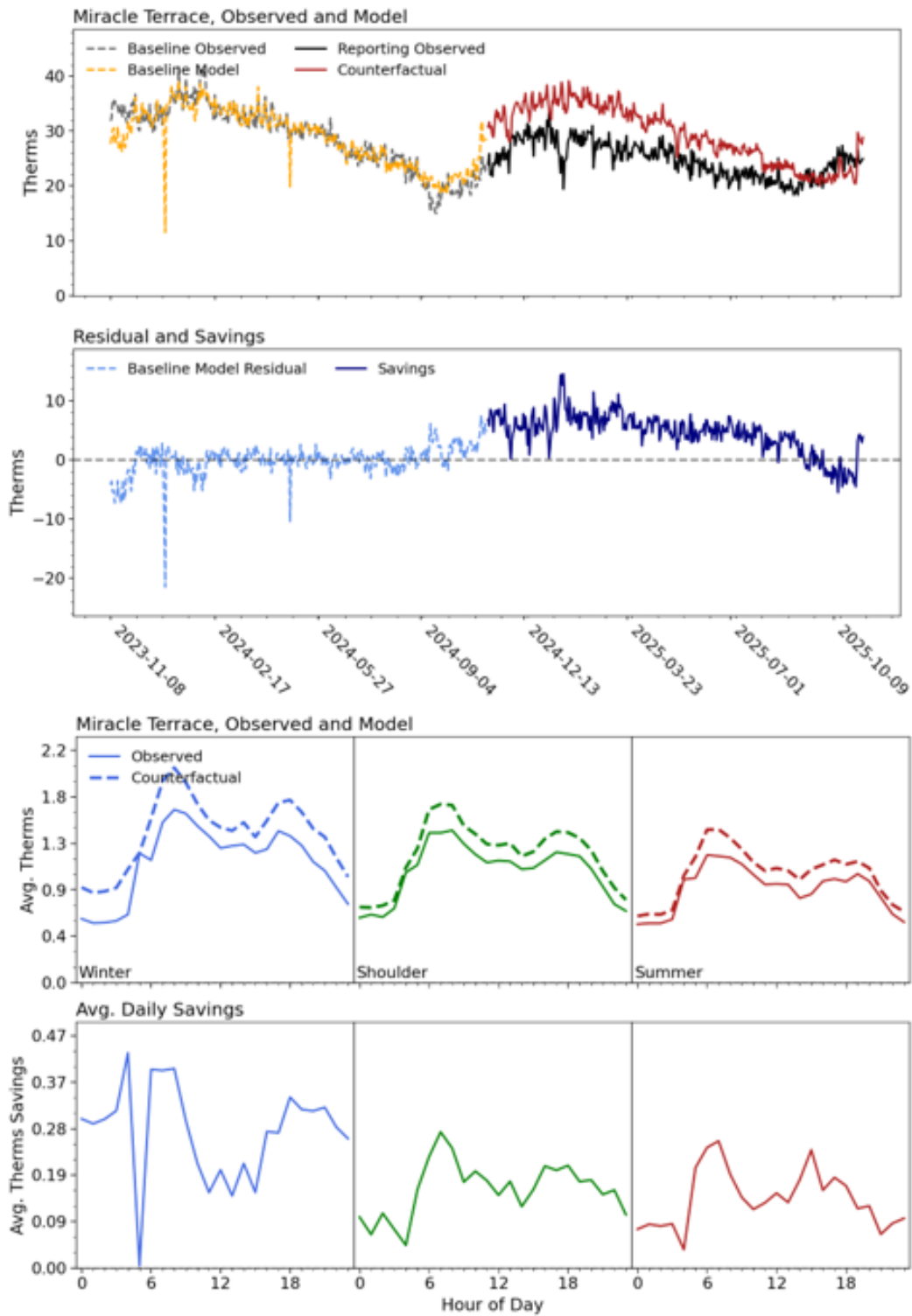
Hollywood Fountain South: 1,556 therms saved (26.2%)



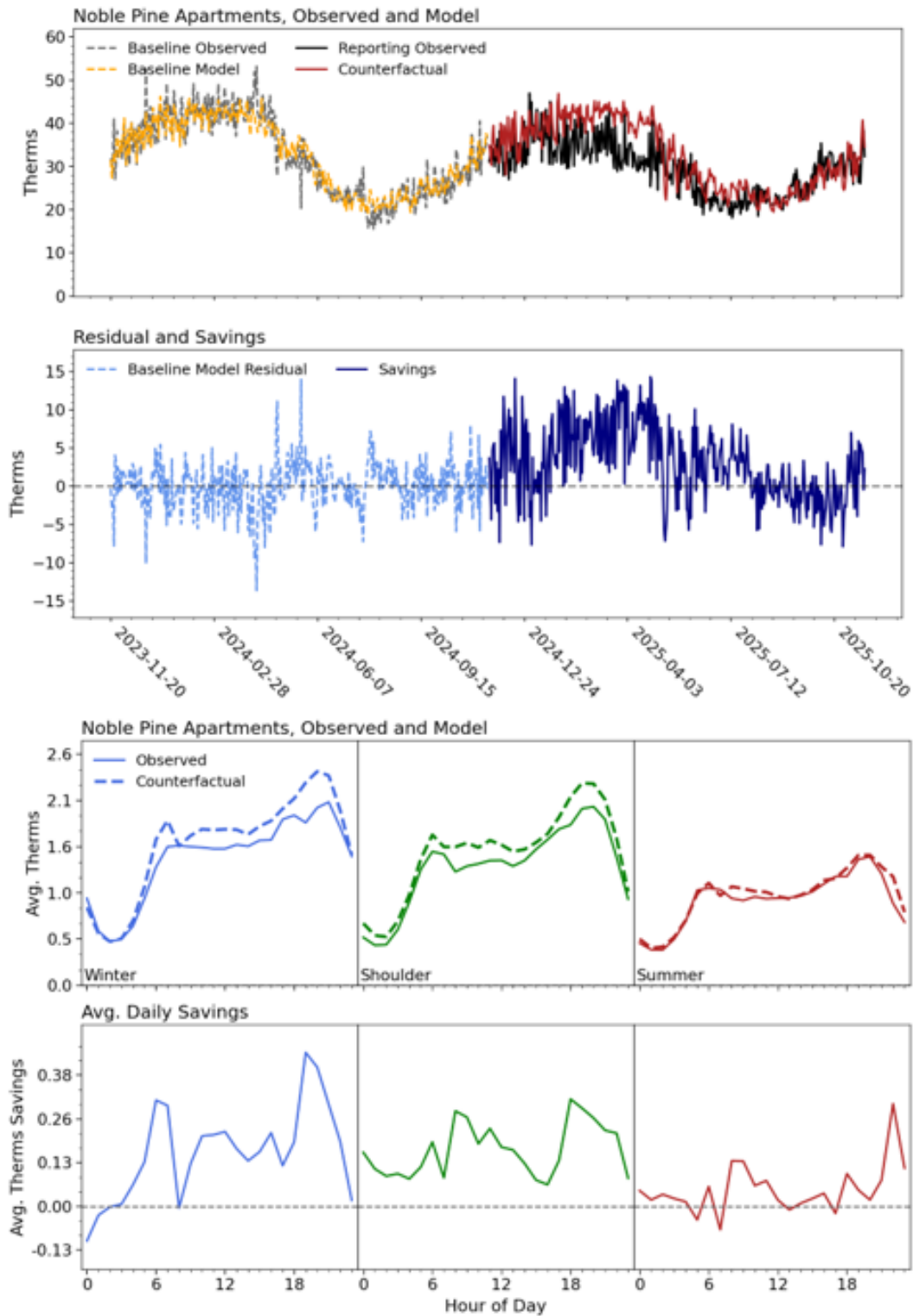
La Mirada Vistas: 1,268 therms saved (18.5%)



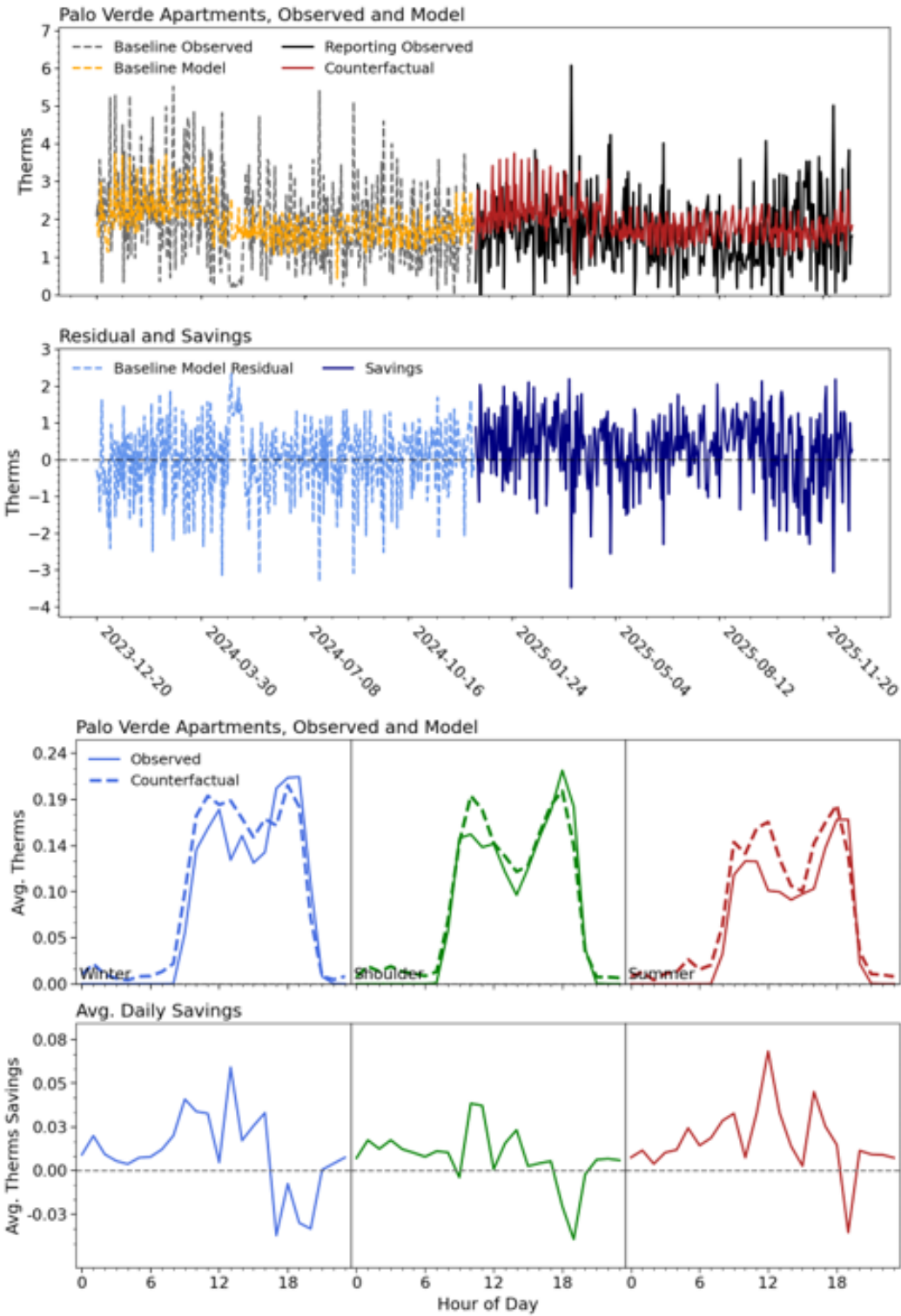
Miracle Terrace: 1,662 therms saved (15.5%)



Noble Pine Apartments: 1,090 therms saved (9.2%)



Palo Verde Apartments: 106 therms saved (15.1%)



**CALIFORNIA ALTERNATIVE RATES FOR ENERGY (CARE)
PROGRAM ANNUAL REPORT**

2. CARE EXECUTIVE SUMMARY

The SoCalGas CARE program, formerly known as the Low-Income Ratepayer Assistance Program (LIRA) was established through a legislative mandate and was implemented by the Commission in D.89-07-062 and D.89-09-044. CARE is a low-income ratepayer assistance program that currently provides a 20% monthly discount on the energy bills of income qualified residential customers and those participating in certain state and federal assistance programs, tenants of sub-metered residential facilities, qualifying group living facilities, agricultural employee housing facilities, and migrant farm worker housing centers. In addition, those who qualify and are approved within 90 days of starting new gas service also receive a \$15 discount on the Service Establishment Charge (“SEC”).

The Commission expanded the program to qualified non-profit group living facilities such as women’s shelters and homeless shelters in 1992. The program was further expanded to qualified agricultural employee housing facilities in D.95-10-047. Issued in PY 2005, D.05-04-052 expanded the program to include authorized agricultural housing facilities managed by the Office of Migrant Services and other non-profit migrant farm worker housing centers.

Since PY 2005, income eligibility for CARE was set by the Commission at 200% of the

FPG.³⁰ In PY2010, the legislature enacted Senate Bill (SB) 695 which changed Public Utilities Code (PUC) section 731.9 to state that eligibility for the CARE program should be no greater than 200% of the FPG. In PY 2006, the Commission authorized the utilities to implement: 1) CE which allowed customers to qualify for CARE based on their participation in certain state or federal public assistance programs; 2) four-year recertification for low-income customers with a fixed income; 3) a process to enroll certain prospective CARE qualified households by telephone; 4) a process to allow all customers to recertify their CARE eligibility through the IVR system; and 5) internet-based CARE enrollment and recertification.

In D.08-11-031, the Commission expanded the list of CE programs to further align with the program-based eligibility programs adopted for the Commission's California Lifeline Program and established an enrollment goal for CARE at 90% of the estimated eligible population³¹. Annual funding and participation targets for 2021-2026 was authorized in D.21-06-015.

In 2025, the CARE program demonstrated strong and stable performance. Enrollment and penetration levels consistently exceeded the Commission's 95% participation target, indicating effective outreach, enrollment, and retention practices. SoCalGas enrolled 280,281³² new CARE customers in 2025. The CARE program's penetration rate

³⁰ See D.05-10-044, OP 1, at 35.

³¹ D.21-06-015 approved a CARE participation goal of 95% for SoCalGas.

³² 2025 CARE Annual Report Table 2 Total New Enrollments.

remained high throughout the year, declining slightly from 110.6% in January to approximately 109% in December, but consistently exceeding the Commission’s 95% participation target. As overall penetration declined modestly and purposely over the year, rates remained well above target, reflecting both conservative eligibility forecasting and effective identification of eligible households. SoCalGas continued to leverage data-driven targeting, cross-utility data exchanges, and community-based outreach to support high program participation while maintaining program integrity.

Key accomplishments for PY 2025 include:

- Expanded real-time enrollment through CSRs resulted in more than 116,715 new enrollments, representing the largest source of new enrollments for 2025;
- Continuation of CARE enrollment, recertification and PEV via SoCalGas’s website and My Account allowing customers real-time enrollment and self-service access to their current CARE status, resulting in 202,146 approved applications;
- Continuation of the Mobile Home Park Utility Conversion Program and effective transfer of CARE and MBL Allowance benefits to residents as their communities transitioned from master-metered to direct utility service;
- Continued best practices in CARE scanning operations for efficiency and accuracy of application processing;
- In accordance with D.11-05-020 and subsequent 2020 All-Party Meeting directives, SoCalGas successfully exchanged data with participating water utilities in March, June, September, and December 2025, yielding 7,940 new cross-enrollments;³³
- Per Joint Stipulation with the IOUs and CETF, promoted education and outreach to assist SoCalGas customers in accessing affordable broadband offers through CETF;

³³ Assigned Commissioner’s Ruling in Response to May 22, 2020 All-Party Meeting on CARE Outreach in Light of COVID, June 15, 2020.

- Renewed or initiated Memoranda of Understandings (MOUs) with more than 40 community- and faith-based organizations and participated in over 3,300 community events to promote Customer Assistance Programs;
- Continued active participation in joint IOU workshops to refine best practices for CARE notifications and processes per the PEV Sub-working Group recommendations;
- In compliance with CPUC D. 21-06-015, the 2022–2024 Evaluation of the CHANGES Program has been completed. The final evaluation report was posted to the PDA in December 2025;
- Completed the annual CARE probability model refresh in October 2025, retaining model accuracy to maintain program integrity;
- Enhanced Recertification and PEV Communications as SoCalGas continued utilizing its real-time SMS notification system to support timely customer responses. New multilingual instructional videos were added to digital channels and linked via QR codes in mailed notices.

Overall, the CARE program continues to be a core affordability mechanism for qualified SoCalGas customers and an essential component of the Commission’s low-income assistance framework. Its statutory foundation and subsequent Commission-directed expansions reflect sustained policy intent to reduce energy cost burdens, promote service continuity, and support equitable access to gas service for vulnerable populations. Program enhancements over time, particularly the adoption of categorical eligibility, extended recertification cycles, and multiple enrollment and verification channels, have reduced participation barriers, increased program enrollment and retention and improved administrative efficiency.

The CARE program continues to operate within a challenging environment, including income volatility, customer mobility, and housing instability among certain populations, which can affect enrollment and recertification outcomes. Ongoing reliance on automated

systems, targeted communications, and partnerships with community organizations remains critical to mitigating these challenges and maintaining continuity of benefits for eligible customers.

CARE provides material affordability benefits to its qualified customers through a 20% bill discount and reductions in service establishment costs for newly connected customers. These benefits play a key role in reducing energy insecurity, supporting bill affordability, and limiting disconnections among low-income households. As such, the CARE program remains a well-performing and essential tool for advancing the Commission's affordability, equity, and consumer protection objectives while adapting to evolving customer and operational conditions.

SoCalGas will continue focusing on sustaining high participation and retention levels through targeted outreach, data-based enrollment strategies, and coordination with community-based organizations. Program priorities include maintaining enrollment penetration above Commission targets, supporting timely and accurate recertification, and ensuring program integrity as customer demographics and eligibility trends evolve. Continued monitoring of participation metrics and operational effectiveness will help ensure that CARE remains responsive to customer needs while advancing the Commission's long-term affordability and equity objectives.

2.1 Participant Information

2.1.1 Provide the total number of residential CARE customers for the reporting period, including sub-metered tenants, by month, and by energy source, and explain any variances of 5% or more in the number of participants

CARE Residential Program		
Gas Customer by Month		
Month/Year	Customers	% Change
January 2025	1,758,224	0.12%
Feb-25	1,759,932	0.10%
March 2025	1,765,712	0.33%
April 2025	1,772,161	0.37%
May 2025	1,771,397	-0.04%
June 2025	1,766,341	-0.29%
July 2025	1,759,511	-0.39%
August 2025	1,753,904	-0.32%
September 2025	1,751,213	-0.15%
October 2025	1,747,505	-0.21%
November 2025	1,738,775	-0.50%
December 2025	1,729,600	-0.53%

2.1.2 Describe the methodology, sources of data, and key computations used to estimate the utility’s CARE enrollment rates by energy source.

SoCalGas continued to use the joint utility methodology adopted in D.01-03-028 for developing monthly enrollment estimates by energy source in 2025.³⁴

This methodology entails annual estimation of eligibility for CARE, FERA and the ESA Program and other income-by-household size parameters at the small

³⁴ Athens Research performs the analysis using the joint utility methodology to provide the estimates of the California IOUs.

area (block group, census tract, ZIP+2, etc.) for each IOU territory and for the state as a whole.

Sources for the 2025 eligibility estimates included: the January 2025 Health and Human Services (HHS) FPG³⁵ (“bundling” one- and two-person households at the HHS-defined 200% FPG limit as required by AB 327), current year small area vendor marginal distributions on household characteristics, Census American Community Survey (ACS) Five Year Summary Block Group Data (2020-2024), five years of American Community Survey Public Use Microdata Survey (ACS PUMS: years 2019-2024, skipping Covid-impacted 2020 data), utility individually-, sub- ,and master-metered household counts, Department of Finance Consumer Price Index series, and various Geographic Information System sources.

The method takes into consideration ACS microdata relationships between guideline status (above/below 200% FPG), tenure, and fuel payment relationships. These cross classifications are fitted to small area (block group) marginals to produce payer type specific distributions, which can be aggregated to various other geographical levels.

Estimates from the block group level are aggregated to county/utility and whole

³⁵ Federal Register/Vol. 90, No 11/January 17, 2025/Notices; p.5917.

utility level, among other aggregations. Quarterly, SoCalGas applies county/utility level eligibility fractions to a new set of “technical eligibility counts” (for CARE, these are metered and sub-metered occupied housing units) to obtain an estimate of income/demographic eligibility in household count form.

SoCalGas counts the number of households (by small area, by county, and overall) that are enrolled in CARE. The CARE household total, including individually metered and sub-metered occupied housing units, is divided by the total income/demographic eligibility to estimate the CARE enrollment rate.

2.1.2.1 Describe how the estimates of current demographic CARE-eligibility rates, by energy source for the pre-June 1st periods, were derived.

The joint utility methodology, as described above, was used throughout PY 2025.

2.1.2.2 Describe how the estimates of current CARE-eligible meters were derived. Explain how total residential meters were adjusted to reflect CARE-eligible meters (i.e., master meters that are not sub-metered or other residential meter configurations that do not provide residential service)

CARE eligibility rates by small and large areas are developed so that they apply to individual residential meters and sub-metered dwelling units only. Non-sub-metered master meters and other meters that do not provide residential service are not included in the “technical eligibility” meter counts.

2.1.2.3 Discuss how the estimates of current CARE-eligible households were developed

See response above to Section 2.1.2. Each start of a quarter (January, April, July and October), SoCalGas applies the county and utility eligibility rates to its current set of CARE-eligible meters that includes both individually and sub-metered housing units. Once the factors are applied, estimates for CARE-eligible households by county were developed. Note that the methodology is based on estimating small area (block group) level household size by income and household-age tabulations for the current year and connecting these estimates with small area counts of households that are individually metered or sub-metered. Block group/utility-specific estimates are then disaggregated/aggregated to various geographic levels within a given utility area such as ZIP+2, ZIP, tract, county, and territory.

2.1.2.4 Describe how current CARE customers were counted.

Current CARE customers were counted by identifying all residential customers receiving the CARE discount at the time of reporting. This total CARE customer count includes individually metered residential customers enrolled in the CARE Program; and sub-metered tenants residing in master-metered residential facilities whose accounts were receiving the CARE discount.

2.1.2.5 Discuss how the elements above were used to derive the utility's CARE participation rates by energy source.

The formula for calculating CARE-participation is:

$$\frac{\text{Number of CARE Customers}}{\text{Number of Estimated CARE-Eligible Households}}$$

The participation rate is the total number of participating CARE customers divided by the estimated eligible CARE population.

2.1.3 Provide the estimates of current demographic CARE-eligibility rates by energy source at year-end.

SoCalGas is a single energy source utility for natural gas. At year-end 2025, based on the available eligibility data, of SoCalGas's 5,774,501 residential CARE-eligible meters, 27.47% or 1,586,607 households were estimated to be eligible for the CARE discount.

2.1.4 Provide the estimates of current CARE-eligible sub-metered tenants of master-meter customers by energy source at year-end.

In December 2025, SoCalGas had 109,288 sub-metered tenants in 1,302 master-meter facilities. Assuming, by the methodology described above, 41% of its sub-metered residential customers are eligible for CARE, SoCalGas estimates 44,885 of its sub-metered tenants are CARE-eligible.

2.1.5 Provide the current CARE sub-metered tenant counts by energy source at year-end.

In December 2025, SoCalGas had 23,521 sub-metered tenants participating in the CARE program.

2.1.6 Provide the current CARE sub-metered enrollment rates by energy source at year-end.

SoCalGas estimates 52% of its CARE-eligible sub-metered tenants were enrolled in the CARE program as of the end of PY 2025.

2.1.7 Discuss any problems encountered administering the CARE program for sub-metered tenants and/or master-meter customers during the reporting period, and how they were addressed to resolve them.

In PY 2025, SoCalGas did not encounter any major problems in administering the CARE program for sub-metered and/or master-metered customers.

2.1.8 Discuss the steps taken towards marketing CARE to customers and converting Mobile Home sub-metering to direct utility served customers.

During resident forums, SoCalGas Account Executives (AEs) and mobile home park residents discuss the full details of each park's participation in the Mobile Home Park Utility Conversion Program (MHPUCP) including access to CAPs. AEs provided forum attendees with CARE informational pamphlets that outlined the program and eligibility requirements. Throughout the account sign-up stage and following conversion completion, AEs dedicate time to help residents sign up for CARE and MBL. AEs partner with a CARE representative to verify that both the CARE and MBL discounts are transferred to the resident's newly established accounts prior to them receiving their first bill and before the project reconciliation stage.

2.2 CARE Program Summary

2.2.1 Please provide CARE Program summary costs

CARE Budget Categories	Authorized Budget*	Actual Expenses**	% of Budget Spent
Outreach	\$4,604,267	\$3,629,741	79%
Proc., Certification and Verification	\$2,354,471	\$1,378,022	59%
Post Enrollment Verification	\$261,652	\$176,958	68%
Information Tech./Programming	\$1,144,150	\$1,033,175	90%
Pilots	--	\$(5,782)	N/A
CHANGES	\$437,502	\$437,502	100%
Studies	\$62,500	\$31,776	51%
Regulatory Compliance	\$624,391	\$357,866	57%
General Administration	\$1,200,786	\$1,099,590	92%
CPUC ED Staff	\$84,413	\$11,279	13%
Total Expenses	\$10,774,132	\$8,150,127	76%
Subsidies and Benefits***	\$143,264,981	\$196,411,109	137%
Total Program Costs and Discounts	\$154,039,113	\$204,561,236	133%
* Reflects the authorized funding per D.21-06-015 dated June 3, 2021.			
** Expenses prior to fund shifting. See CARE Table 1 in Attachments.			
*** Subsidies and Benefits exceeded Authorized Budget due to unusually high January bills.			

2.2.2 Please provide the CARE program enrollment rate to date.

CARE Enrollment Year-end 2025			
Participants Enrolled	Eligible Participants	Enrollment rate	Target Met?
1,729,600	1,586,607	109 %	Yes

2.2.3 Discuss any issues or challenges to maintain enrollment goals, including enrollment, recertification and post-enrollment verification, how those issues or challenges were addressed and why goals were not met, if applicable.

No challenges in maintaining the enrollment goals were encountered.

SoCalGas exceeded its goal for PY 2025.

2.2.4 Report the number of customer complaints received (formal or informal, however and wherever received) about their CARE recertification efforts, and the nature of the complaints.

There were two (2) recertification compliments and (0) zero recertification complaints in 2025.

April 2025: Through the Customer Comment Tracking (CCT) system, a customer who recertified expressed appreciation for the SoCalGas CARE program. The customer stated that the CARE program provided significant support to seniors and customers with disabilities, and that without it, paying her gas bill would have been very difficult.

September 2025: Customer contacted the CARE Call Center and expressed that the CARE clerk had been very professional, courteous, and knowledgeable. The clerk was extremely helpful, made the customer feel at ease throughout the recertification process, and deserved recognition for providing such positive customer service.

2.3 CARE Program Costs

2.3.1 Discount Cost

2.3.1.1 State the average monthly CARE discount received, in dollars, per CARE customer by energy source.

The average monthly discount received per SoCalGas's CARE customer

in PY 2025 was \$9.21³⁶ per month.³⁷

2.3.1.2 State the annual subsidy (discount) for all CARE customers by energy source.

SoCalGas's CARE customers and CARE Expansion customers (i.e., farm and migrant workers and those living in non-profit group living facilities or agricultural housing) received \$194,028,869 in natural gas rate discounts and \$2,382,240 in SEC discounts in PY 2025. The aggregate PY 2025 annual subsidy for all SoCalGas CARE customers was \$196,411,109.

2.3.2 Administrative Cost

2.3.2.1 Show the CARE Residential Program's administrative cost by category.

See section 2.2 or CARE Table 1 in the attachments.

2.3.2.2 Explain what is included in each administrative cost category

Marketing & Outreach (M&O): This category includes costs for the printing and mailing of CARE applications, recertification requests, PEV requests, monthly sub-metered unit lists, and correspondence, the printing

³⁶ The average monthly rate discount was computed by dividing the CARE rate discount recorded to the CARE balancing account in 2024 by the monthly residential CARE customers: the total of the 12 months was then divided by 12 for the average monthly CARE discount per customer.

³⁷ This number does not reflect the CARE customers who received a discount on their Service Establishment Charge (SEC).

and mailing of SB 920 annual notification,³⁸ postage, bill inserts, brochures, flyers, advertising/mass media campaigns, text messaging, direct mailing campaigns, email campaigns, translations, social media, third-party outreach, door-to-door canvassing, community event sponsorships and support, distribution of collateral materials, outreach staff labor, and other outreach and enrollment efforts. Compensation for CBOs who are paid monthly grants based on agreed amounts in Memos of Understandings are also included in this category. Forty CBOs were utilized in 2025 to build awareness on customer assistance programs. Capitation payments and any agency-related outreach support efforts are included in this category as well. Capitation payments are compensation fees paid to CBOs that assist SoCalGas in enrolling hard-to-reach CARE-eligible customers in the program.

Processing, Certification and Recertification: This category includes costs for CSR CARE enrollment, the CARE Processing Group labor, and document scanning costs. The function of the CARE Processing Group includes: 1) processing CARE applications; 2) initiating and responding to customers' inquiries regarding CARE applications and/or the program; 3) enrolling customers over the phone; 4) determining CARE eligibility

³⁸ SB 920 requires that homeowners and residents of a master-metered park receive notification in their utility billing statement of the assistance available to them under the CARE program. This notification must be received on or before February 1 of each year.

based on income or assistance programs documentation received; and 5) conducting follow-up calls to resolve any outstanding customer inquiries.

Post Enrollment Verification (PEV): CARE eligibility verification costs are tracked separately. This category includes staff labor costs for processing the verification of applications and supplemental documentation, handling verification-related calls, and training.

Information Technology (IT) Programming: This category includes IT labor and contractor costs to maintain the SoCalGas CARE application billing system, CARE IVR applications, CARE online applications, CARE functions in CSR enrollment, My Account, CARE documents, CARE database, system reports, data exchanges with other utilities, charges to conduct system enhancements to comply with Commission mandates, and improvements in operational efficiency.

Community Help and Awareness with Natural Gas and Electricity

Services (CHANGES): This category includes costs related to the CHANGES program billed by the CPUC as well as the CHANGES evaluation costs.

Regulatory Compliance: These costs include labor and non-labor costs for the preparation and filing of various regulatory documents including

program applications, AL filings, comments and tariff revisions, preparation of monthly/annual reports, studies, attendance at working group meetings, public input meetings, and other Commission hearings or meetings.

General Administration: This category includes costs for program management labor, tracking CARE enrollment and operating statistics in support of operations, management, and regulatory reporting; office supplies, market research, and general business expenses.

Commission Energy Division Staff Funding: This category includes costs incurred by ED staff in support of the Commission's authorized low-income programs.

Pilots: This category includes all incremental labor costs related to CARE pilots.

2.3.3 Provide the year-end December 31 balance for the CARE balancing account.

At year-end 2025, the CARE balancing account was over-collected by \$10,753,127.

2.3.4 Describe which cost categories are recorded to the CARE balancing account and which are included in base rates.

The recorded costs in the CARE balancing account include the SEC discounts, all rate discounts, surcharge revenues, amortization, interest, and administrative costs (as described in Section 2.3.2.2). The costs recorded in the CARE balancing account are not included in base rates.

2.3.5 Provide a table showing, by customer class, the CARE surcharge paid, the average bill paid, the percentage of CARE surcharge paid relative to the average bill, the total CARE surcharge collected, and the percentage of total CARE revenues paid.

See CARE Table 10 in the attachments.

2.4 Marketing, Education and Outreach (ME&O)

2.4.1 Discuss utility outreach activities and those undertaken by third parties on the utility's behalf including Lifeline coordination.

In 2025, SoCalGas remained dedicated to amplifying awareness and increasing participation in the CARE program through a blend of targeted and grassroots marketing and outreach strategies. These efforts encompassed multimedia advertising campaigns, direct mail, email correspondence, text messages, bill inserts, door-to-door canvassing, and active involvement in community outreach events. In addition to these targeted tactics, in PY 2025, SoCalGas worked with CBOs to help with outreach of the CARE program and promote awareness to increase enrollment with customers while continuing to expand awareness to hard-to-reach customers. These CBOs serve specialized markets and help SoCalGas enhance awareness of the CARE discount, with a specific focus on

hard-to-reach communities including non-English speaking customers, customers with disabilities, veterans, and seniors.

As an example, in PY 2025, SoCalGas continued its partnership with Veteran's Legal Institute (VLI), a public interest law firm that provides pro-bono legal assistance to homeless and low-income veterans and active-duty service members across Orange, Riverside, San Bernardino, and Los Angeles counties. Through one-on-one client meetings, resource fairs, and veteran-focused events, VLI shared information about SoCalGas' Customer Assistance Programs, enabling veterans in need to access bill assistance information alongside other critical support services.

In PY 2025, SoCalGas also partnered with Goodwill Central Coast, a non-profit organization focused on workforce development and financial self-sufficiency for individuals with low to moderate incomes. Through Goodwill's Opportunity Platform, and workforce service programs, SoCalGas Customer Assistance Programs information was provided to job seekers and families receiving employment, training or financial literacy support. This collaboration helped customers facing economic challenges being informed about SoCalGas programs that could help reduce their natural gas bills while working towards financial stability.

In addition, SoCalGas continued its partnership with Human Service Association (HSA), a non-profit organization established in 1940 and incorporated in 1975 primarily serving the Southeast Los Angeles region. HSA supports individuals through their entire lifespan by providing services in four core areas: Early Childhood Education, Family, Community and Senior Services. Annually, the team of 230 plus staff and 350 volunteers/interns serve over 11,000 children, adults, and seniors enrolled in early childhood education, domestic violence, child abuse prevention, family preservation, senior home delivered meals and senior in-home services. HSA's mission is to provide families with compassionate, comprehensive care to promote wellness and build strong communities. HSA's vision is to keep families safe, healthy, happy and thriving in their communities. Through this partnership, HSA provides SoCalGas Customer Assistance Programs information via their variety of programs.

Ethnic Media: Ethnic media plays a crucial role in reaching out to hard-to-reach customers. For instance, SoCalGas collaborates with Chavez Radio Group (KMYX, Bakersfield & KUFW, Visalia) to enhance awareness of its Customer Assistance Programs, particularly among farmworkers and undocumented residents with Limited English Proficiency (LEP) in the rural areas of SoCalGas's service territory. These demographic customers can be less trusting of utilities or government sponsored initiatives due to the risk of exposure and are less likely to accept programs or services. By partnering with Chavez Radio Group, SoCalGas can connect with these customers through a trusted community partner and in

their language. The radio schedule includes brief, 30-second Spanish-language ads broadcast multiple times a day.

In 2025, SoCalGas launched an advertising campaign for all Customer Assistance Programs that targeted ethnic customers (further discussed in the Multi-Media section below) generating approximately 79 million total media impressions across a channel mix of digital and social media.

In addition to the radio spots, SoCalGas's relationship with Chavez Radio Group includes the stations KUFW LA Campesina 106.3 and KBHH Forge 95.3. Chavez Radio Group provided opportunities for SoCalGas to participate in events, such as *Cuadrilla De La Semana*, which are weekly visits to farmworkers in their workplaces. Food, musical entertainment, and information from SoCalGas regarding the CARE program are part of these lunch break sessions. In 2025 Chavez Radio Group increased the presence of SoCalGas via social media posts on Facebook, Instagram, and X.

Multi-Media: SoCalGas launched a paid media advertising campaign for all CAPs the last week of PY 2024 to continue through March 2025. Due to its success, the campaign was relaunched from July through December. The objective of this multi-channel targeted mass-media campaign was to increase visits to the Customer Assistance Programs' webpage and increase awareness among eligible customers. The campaign included a mix of broad channels and

targeted strategies to generate awareness and drive actions to the program landing page. The channel mix included digital video, display, and social media. The campaign tag line, “Everybody needs a little help sometimes,” speaks to the support that SoCalGas offers its customers by way of its CAPs (e.g., CARE, ESA Program, and MBL), which can be found on the CAPs landing page.

The first campaign took place from 12/23/25 – 3/28/25. It resulted in:

- 123,556,618 total impressions across all channels
 - 113,281,365 impressions across the general market
 - 10,275,253 impressions across the Hispanic/Latino market
- 36,120 Customer Assistance Programs webpage visits generated for the general market
- 10,789 Customer Assistance Programs webpage visits generated for the Hispanic/Latino market

The second campaign took place from 7/10/25 – 12/23/25. It resulted in:

- 78,978,999 total impressions across all channels
 - 51,466,139 impressions across the general market
 - 27,512,860 impressions across the Hispanic/Latino market
- 199,564 Customer Assistance Programs webpage visits generated for the general market
- 47,020 Customer Assistance Programs webpage visits generated for the Hispanic/Latino market

Social Media:

No CARE-specific social media activity took place in 2025. However, the social media component of the CAP campaign directed customers to the SoCalGas CAP landing page, where they could still access information about the CARE program.

Text Messages: Text messaging has proven to be a cost-effective and impactful communication channel for SoCalGas. In 2025, SoCalGas strategically employed

text messages to engage eligible customers with the CARE program. These messages included a direct link to the online CARE application, encouraging both new and existing eligible non-CARE customers to apply. Additionally, targeted texts were sent to customers needing recertification to maintain their enrollment. These text messages were sent to customers from January 2025 through July 2025. Approximately 367,994 texts were delivered to these various groups. This approach, coupled with email and direct mailers, effectively communicated CARE program details to SoCalGas customers. These text efforts generated 6,847 new CARE enrollments – 103% higher than in 2024.

In September 2024, SoCalGas leveraged existing messaging technology already in use across other departments to launch a new text message notification process, improving direct communication with its CARE customers. This initiative was designed to make sure that customers who had recently received or simply still had not completed their PEV or Recertification request could remain mindful of the need to respond, avoiding less efficient instances of being removed and later added back to the program.

The text message alerts were also sent to targeted lists of CARE customers whose recertifications and PEVs required further action. Messages provide essential information and a direct URL for customers to respond promptly. The primary goal was to encourage timely responses and avoid any unnecessary modifications to customers rates. In 2025, a total of 563,578 outgoing text messages were sent

to these CARE customers. Since inception, a total of 718,080 text messages has been delivered.

By leveraging this direct communication channel, SoCalGas aimed to improve customer engagement and streamline the verification process. The initiative not only demonstrated SoCalGas's commitment to customer service but also highlighted the company's proactive approach in utilizing technology to meet customer needs.

This strategic move was part of a broader effort to enhance the overall customer experience, helping CARE customers maintain their benefits with minimal hassle. Success was measured by the effective delivery of timely, actionable messages, along with customer engagement indicators such as low opt-out rates and improved responsiveness to CARE recertification and reminder notices. These outcomes underscored the importance of effective communication in fostering customer satisfaction and loyalty.

Direct Mail: Targeted direct mail campaigns remain a versatile and highly effective strategy for CARE program enrollment. These campaigns generally reach out to individuals with a high probability of qualifying for low-income programs. The criteria for campaign targeting include CARE customers who need to re-enroll, those nearing the end of their program term requiring recertification,

new eligible customers, existing SoCalGas customers not currently on CARE, and CARE customers with recent address changes.

From January through July 2025, SoCalGas continued proactive engagement with both new and existing customers not on CARE through targeted direct mail initiatives. Additionally, direct mail letters were sent to customers who had previously participated in the CARE program but failed to recertify, encouraging them to reapply online and reestablish their monthly discount.

The direct mail messaging during this period featured tailored savings information, along with clear instructions on applying for the program online. To enhance personalization, savings amounts were customized based on individual customer data from past bills for current customers not on CARE and those eligible for re-enrollment. For new customers, the message reflected the average annual savings of a CARE customer.

In PY 2025, SoCalGas continued to conduct annual SB 920 targeted mailing to master-metered facilities with sub-metered tenants to remind them of their responsibility to notify their tenants about the CARE program discount available to them. SoCalGas also continues to maintain compliance with AB 2104 by mailing out the monthly *Add & Delete Report* to notify owners/managers of sub-metered facilities of any tenants who have been added to CARE or removed from

the program. Lastly, SoCalGas maintains compliance with AB 2857 by approving eligible sub-metered tenants who live in facilities that are not 100% sub-metered.

Bill Message: During PY 2025, CARE bill messages were printed in both English and Spanish on non-participating customers' bills and were sent out quarterly. Generally, when applicable, CARE bill messages are sent out 90 and 45 days after the PEV letters are mailed to remind customers that SoCalGas has not received their verification application and proof of income. Further, if there is no response from the customer after 100 days, SoCalGas sends those customers a bill message informing them that they have been removed from the program.

SoCalGas also generally promoted SoCalGas's Customer Assistance Programs via printed bill envelope messages several times a year, encouraging visits by residential customers, regardless of program status, to the main CAP webpage to learn more.

Bill Inserts: Bill inserts remain a cost-effective means to promote program awareness and encourage enrollment, featuring bilingual content in English and Spanish with basic program details. In July 2025, SoCalGas distributed bill inserts to over 1.3 million residential customers, outlining annual eligibility guidelines. Additionally, to comply with the AB 3 mandate, approximately 1.6 million bill inserts were sent to residential and non-residential customers at risk of service disconnection. These inserts highlighted available customer assistance programs

available to help manage bills. Moreover, in August 2025 SoCalGas sent a bill insert to approximately 16,435 commercial customers. This bill insert described the CARE rate for commercial facilities such as non-profit group living and migrant farmworker housing.

Cross Program Promotion: Proactive communication and outreach efforts were executed to cross-promote the CARE program alongside other CAPs and energy efficiency initiatives, enhancing customer benefits and minimizing costs. The application process was streamlined by integrating CARE with SoCalGas's ESA Program application, facilitating seamless access to services and information for customers. SoCalGas also extended its outreach to promote external programs, such as California Lifeline for discounted phone services and CETF for low-cost internet, through direct mailers and targeted emails, thereby enhancing the spectrum of available support. Customer data from SoCalGas's ESA Program, Gas Assistance Fund (GAF), and LIHEAP were leveraged for CARE enrollment, recertification, and verification. Specialized collateral materials were developed for SoCalGas's outreach department and field operations personnel to comprehensively inform customers about all accessible low-income and special needs programs and services. Additionally, SoCalGas's Field Operations Team is directed to leave CAP information materials in both English and Spanish during home service visits.

SoCalGas.com Website: The SoCalGas website (www.socalgas.com) serves as a continuous 24/7 communication and enrollment platform for the CARE program. Monthly email blasts actively promote the CARE webpage, guiding customers to apply by visiting www.socalgas.com. Additionally, paper applications sent by mail include the convenient option to apply online at www.socalgas.com. Customers may enroll in the CARE program in real time by submitting an online application through socalgas.com or by accessing the CARE application within My Account. Customers who are already enrolled in CARE and receive an email or mailed reminder to recertify their eligibility are directed to the website, where they may complete the recertification process online. Customers selected for verification are likewise encouraged to securely upload the required documentation through either socalgas.com or My Account.

SoCalGas provides online CARE applications in five languages: English, Spanish, Chinese, Korean, and Vietnamese to support broad accessibility. Additionally, SoCalGas offers downloadable large-print CARE applications for customers with visual impairments, as well as downloadable applications in 13 languages: English, Spanish, Chinese, Korean, Vietnamese, Armenian, Arabic, Hmong, Farsi, Khmer, Russian, Tagalog, and Thai.

Customer Contact Center (CCC): While customers are on hold to speak to a CSR, the IVR system informs them about CARE and other assistance programs. As of February 2018, CSRs began offering immediate CARE enrollment to

customers who call to start new gas service or make payment arrangements. For customers who prefer to receive an application in the mail, CSRs initiate the mailing.

In its pursuit for continued improvement in customer service, SoCalGas expanded the category of customers who are enrolled by a CSR, and as of Q3 2023, they are no longer limited to turn-ons and payment arrangements. This would include offering CARE enrollment to customers who call regarding the Arrearage Management Payment Plan (AMP), or any billing-related calls. In 2025, CSRs enrolled SoCalGas customers in the CARE program while offering other customer assistance program services over the phone.

Bilingual Employees: The CCC, CARE Customer Support Center, and most company business offices continued to be staffed with bilingual (English and Spanish) representatives. Vietnamese, Korean, Mandarin, and Cantonese telephone lines are staffed from 8:00 am to 5:00 pm, Monday through Friday, at the CCC. Deaf and hearing-impaired customers may also contact the CCC through its Teletypewriter (TTY)/Telecommunications Device for the Deaf (TDD) equipment 24 hours a day, seven days a week. Additionally, SoCalGas's call center is equipped to provide services in 240 languages through the *Language Line Service*, a third-party interpreter service which is available 24 hours a day, seven days a week. For hearing impaired customers, a toll-free number is also provided.

Branch Payment Offices (BPO): Typically, both English and Spanish CARE applications, along with informational brochures, are routinely accessible in all BPOs. The CARE program is actively promoted during each transaction so that customers are aware of the available assistance. Additionally, comprehensive English and Spanish CARE posters featuring program guidelines and valuable information are prominently displayed in every BPO. These materials undergo regular updates and distribution to align with changes in program information and income guidelines. Customers visiting in person at any location receive the latest CARE program material for their reference.

Community Events: During PY 2025, SoCalGas personnel along with its community partners participated in over 3,300 general and low-income specific community events. The goal of each event was to generate awareness of and increase participation in CAPs. SoCalGas has strived to utilize events and event sponsorships to extend messaging with its communities and as opportunities to work with other organizations so that residents and customers get maximum value from attending. Because of the strong relationships developed with key community partners, the awareness of programs continues via events held by the organizations. Examples of activities in PY 2025 where CAP information was distributed included Food Distributions, Senior Kit Distributions, emergency box distributions, language and citizenship classes and vaccine clinics to name a few.

Third-Party Outreach: In order to improve its efforts to communicate with hard-to-reach customers, SoCalGas has engaged a third-party contractor to perform door-to-door outreach for new CARE enrollments. These outreach contractors produce high volume enrollments from a hands-on customer approach.

Community-Based Organizations (CBOs): In PY 2025, SoCalGas continued its grassroots outreach efforts. The primary driver has been to establish relationships with Faith-Based Organizations (FBOs) and CBOs to enroll hard-to-reach customers. During PY 2025, SoCalGas continued working with existing organizations, and added several new key partners to expand awareness. Below are new key partners from PY 2025.³⁹

³⁹ List of organizations in PY 2025 include: 211 LA County (Information & Referral Services), Blindness Support Services, Catholic Charities of Orange County, Center for Family Strengthening-Promotores Collaborative of San Luis Obispo, Chavez Radio Group-Cesar Chavez Foundation, Chinatown Service Center, Deaf Latinos Y Familias, Disabilities Community Resource Center (DCRC), El Concilio del Condado de Ventura, El Nido Family Centers, Families Forward, Fernandeano Tataviam Band of Mission Indians, Fiesta Educativa, FIND Food Bank, Foodbank of Santa Barbara County, Food Share of Ventura County, Frank D. Lanterman Regional Center, Goodwill Central Coast, Goodwill of Orange County, Greater Los Angeles Agency on Deafness (GLAD), Human Services Association (HSA) LA, Indigenous Women Rising, Inner City Law, LIFT LA, MEND, Mixteco Indigena Community Organizing Project (MICOP), Newstart Housing Corporation, OC Autism Foundation, ONEgeneration, PARS Equality Center, Pregnacny & Parenting Support of San Luis Obispo, South Central Los Angeles Regional Center (SCLARC), South County Outreach, Southeast Community Development Corporation (SCDC), Southern California Indian Center, Southern California Resource Services for Independent Living (SCRS-IL), St. Barnabas Senior Services, The Link Family Resource Center Serving San Luis Obispo County, The Los Angeles County / University of Southern California Medical Center-Center Auxiliary for Recruitment, Education, and Services (CARES), The Vietnamese Community of the Southern Californians (VietSoCal), Unity Shoppe, Torres Martinez Desert Cahuilla Indians, Veteran's Legal Institute, Via Care Community Health Center, Walking Shield, Worksite Wellness LA.

Goodwill Central Coast - Beginning August 2025, SoCalGas began a new collaboration with Goodwill Central Coast. The non-profit organization has provided workforce services on the Central Coast for almost 90 years. Goodwill Central Coast's Opportunity Platform empowers individuals to reach their full potential and overcome barriers to success by providing them with the tools, resources, and guidance needed to achieve self-sufficiency. They follow a structured and empathetic approach that focuses on financial aspirations, job stability, income enhancement, and ultimately becoming debt-free.

Pregnancy & Parenting Support of San Luis Obispo - SoCalGas continues its collaboration with Pregnancy and Parenting Support of San Luis Obispo County (PPSSLO). PPSSLO provides emotional support, practical assistance, and connections to community resources from pregnancy through early childhood. PPSSLO's free services include classes and support groups and necessary items for pregnancy and early childcare. They are actively involved in community public health initiatives supporting education on healthy pregnancies.

Torres Martinez Desert Cahuilla Indians - SoCalGas Customer Assistance Programs continued its collaboration with the Torres Martinez Desert Cahuilla Indians, located in Imperial and Riverside counties. The Cahuilla people have resided in Martinez Canyon since the early 19th century, following the unification of the Torres and Martinez reservations. The vision of the Torres Martinez Desert Cahuilla Indians is to foster educational and economic opportunities, enhance

social services and improve overall life quality for its members and staff, thereby contributing to a cohesive community. The tribe aims to extend its outreach to tribal members within its lands and to off-reservation descendants in Los Angeles, Orange, Riverside and San Bernardino counties. In pursuit of this vision, the tribe plans to collaborate with local indigenous leaders and engage with both the Torres Martinez Desert Cahuilla Indians and the broader indigenous community during events across these regions. Additionally, they will act as a conduit, offering support to SoCalGas Customer Assistance Programs by sharing their program information within the community.

Capitation Contractors: In 2025, SoCalGas worked with one active capitation agency, APAC Service Center & Insurance Services to enroll eligible non-participating customers in the CARE program. “CARE Capitation Contractors” are located throughout the SoCalGas service area and employ various types of outreach strategies, such as local community event participation, walk-in enrollment, and program material distribution to enroll customers. In 2025, information on participation in the capitation program was included on the SoCalGas website. Also, capitation agencies can utilize the web link authorized for capitation agencies to assist customers with their CARE enrollment process online. The web link tracks their source code so they can receive credit for new CARE enrollments. In 2025, four enrollments were submitted by one capitation agency.

2.4.1.1 Discuss outreach to CARE customers for the Home Energy Report, including percentage participation.

Although Home Energy Reports (HERs) continue to be generated for Energy Efficiency customers, the initiative to specifically target CARE customers concluded in 2020.

2.4.2 Discuss the most effective outreach method, including a discussion of how success is measured.

SoCalGas utilizes a mix of outreach methods, with email serving as a core, timely, and efficient communication tool. This integrated approach enhances customer engagement and allows us to measure outreach effectiveness through a variety of metrics.

Direct Mail:

- **Approach:** Targeted direct mail campaigns reached new customers, existing non-CARE customers, and those who need to re-apply to the CARE program.
- **Success Measurement:** While online enrollments from direct mail lack tracking, the success is inferred through increased program visibility and engagement.
- **Insight:** Direct mail, in both English and Spanish, reached approximately 307,534 customers and guided them to the website using adjustable eligibility criteria, with targeted emphasis on high-gap, high-eligibility, and low-penetration areas.

Web Based Outreach:

- **Approach:** Facilitating 91,785 new online enrollments in 2025, SoCalGas utilized multiple channels like the website, email campaigns, social media, and digital efforts.
- **Success Measurement:** Success is gauged through website visits and sign-ups at www.socalgas.com/CARE, and www.socalgas.com/CAREparami.

- **Impact of Technology:** In 2025, web transactions via My Account and web applications, contributed significantly with 226,434 total transactions, including self-certification, recertification, and PEV. As a result, over 202,000 customers were enrolled, recertified, or PEV'ed in CARE.

Email and Social Media:

- **Approach:** Leveraging email and social media platforms, like Facebook and Instagram, for improved effectiveness and to drive click-throughs.
- **Success Measurement:** Impressions, click-through rates, and online enrollments continue to serve as key performance indicators for our outreach efforts. During the first half of 2025 (January through June), a total of 13,037 customers actively engaged and clicked through to the CARE program webpage using an email link, demonstrating strong engagement and highlighting the effectiveness of our email marketing strategy.

Third-Party Door-to-Door Outreach:

- **Approach:** Third-party door-to-door outreach resulted in 10,162 enrollments in 2025, targeting the hardest-to-reach low-income customers.
- **Success Measurement:** Success is measured through the volume of enrollments and the effectiveness of a hands-on customer approach.

Bill Inserts:

- **Approach:** Over 1.33 million CARE bill inserts were sent in July 2025, enrolling approximately 2,220 new CARE customers.
- **Success Measurement:** Success is measured through enrollments resulting from bill insert dissemination.
- **Cost-Effective Strategy:** Residential bill inserts are sent only to residential customers not on CARE to optimize this channel's cost-effectiveness.

Customer Awareness:

- **Approach:** SoCalGas prioritizes targeted multi-media campaigns and grassroots partnerships to maintain and enhance CARE program awareness.
- **Success Measurement:** The success of awareness campaigns is tracked through individual channels and overall program engagement.

- **Holistic Approach:** SoCalGas views various outreach methods as interconnected and mutually reinforcing, acknowledging the impact of multiple channels on customer decisions.

Capitation Program:

In addition to capitation information in the latter part of Section 2.4.1, SoCalGas worked with different CBOs and outreach agencies to enroll eligible nonparticipating customers in the CARE program during PY 2025. CARE capitation contractors are located throughout the SoCalGas service area and employ various types of outreach strategies to enroll customers, such as local community event participation, walk-in enrollment, and program material distribution. In 2025, four approved CARE applications were submitted by one capitation agency.

Community-Based Organizations (CBO)/Faith-Based Organizations (FBO):

SoCalGas has been increasing its collaboration with CBOs and FBOs with hard-to-reach customer bases. These organizations are crucial parts of SoCalGas's relationship network to enhance awareness and trust among all customers, especially with hard-to-reach customers. The organizations that SoCalGas works with have a deep and ongoing relationship with their communities and are the trusted resource for their constituents. Often customers come to these CBOs/FBOs for assistance with all matters relating to their home, family, and finances. For example, some CBOs that SoCalGas partners with help to do outreach in communities where trust issues may lie including Chavez Radio Group among farmworkers, Saint Barnabas Senior Services helping seniors in multiple languages throughout LA County, Mixteco Indigena Community

Organizing Project/Proyecto Mixteco Indigena (MICOP) serving the Mixtec and indigenous immigrant community in Ventura County, Catholic Charities of Orange County promoting programs among CalFresh applicants in Orange County, Viet SoCal for the Vietnamese communities of Orange County, Fiesta Educativa working with parents of children with disabilities throughout Southern California, and PARS Equality that work with Persian Speaking populations and Afghan Communities of LA County.

2.4.3 Discuss barriers to participation encountered during the reporting period and steps taken to mitigate them.

During the LINA 2025 reporting period, customers continued to encounter several persistent barriers to participating in low-income energy programs. As identified in the LINA study, landlord and tenant dynamics remain a major obstacle, especially for renters in multifamily housing. Renters frequently reported minimal communication with landlords, often only a few times per year, and shared concerns about requesting appliance repairs or program participation for fear of “annoying” their landlord or triggering rent increases. Many tenants also expressed skepticism that the ESA Program was truly provided at no cost, while others feared that landlords would deny permission for upgrades or fail to respond even when approached. These issues, consistently documented in previous LINA studies and reaffirmed in the 2025 LINA, demonstrate that fears of rent increases, distrust of program legitimacy, and limited landlord engagement continue to suppress renter participation. Although these structural barriers cannot be fully addressed through program interventions alone, the insights remain valuable for

refining targeting strategies, outreach approaches, and service delivery for households across different building types and regions.

In addition to renter related challenges, language access barriers continued to restrict participation among limited English proficient customers. Some participants demonstrated significantly lower program awareness than other language groups and emphasized the need for clear, consistent in-language materials and identified culturally relevant outreach channels as critical. These findings reinforce earlier LINA research showing that providing appropriate language communication throughout the entire customer experience is essential for effectively engaging diverse communities.

To continue addressing these barriers, SoCalGas's PY 2025 multimedia campaigns focused on increasing program awareness and reducing customer hesitancy. Campaign messaging highlighted that SoCalGas is available to help reduce financial burdens through its customer assistance programs and emphasized the simplicity of the online application and enrollment process. Recognizing ongoing language barriers, SoCalGas also delivered targeted, in language promotions to Hispanic and Latino communities to reach customers who may be unfamiliar with available programs. In 2025, the theme "Everybody Needs A Little Help Sometimes," served as the core message of the Customer Assistance Programs awareness campaign underscoring support, accessibility, and reassurance for households experiencing financial challenges.

Collectively, these efforts, combined with insights from recent LINAs, continue to guide SoCalGas's approach to mitigating participation barriers. Although certain structural challenges, particularly those tied to landlord and tenant relationships, remain difficult to resolve directly, the utility's ongoing investment in culturally relevant outreach, in-language communication, and streamlined enrollment processes is helping improve access and promote more equitable participation across the diverse communities it serves.

SoCalGas is working increasingly with its partners in the community to make computers accessible to the customers they serve. The computers are used as an opportunity to guide customers through SoCalGas's programs and online enrollment process as opposed to taking materials home – where they can get lost due to hectic everyday life – pending the return by mail or other enrollment efforts. Online sign-ups played a key role in several outreach events, and this approach is expected to continue and increase in the future. Partnerships with organizations like Southeast Development Corporation who have mobile computer labs, and Saint Barnabas Senior Services who have a Senior Tech Lab help by having this onsite enrollment for the customers they serve. In 2025, SoCalGas continued looking into partnering with organizations that work in different segments that continue to be hard to reach such as foodbanks, community colleges, clinics, community centers, and/or consulates where customers are already there to seek information and can have access to learn about and enroll in SoCalGas's Customer Assistance Programs.

2.4.4 Discuss how CARE customer data and other relevant program information is shared by the utility with other utilities sharing its service territory.

Data Sharing: In 2025, SoCalGas continued the practice of data sharing CARE enrollments with other IOUs within its shared service territory. CARE eligible customer data continued to be exchanged with SCE, SDG&E, and PG&E so that each IOU has the benefit of enrolling non-CARE customers into CARE.

SoCalGas's customers enrolled through data-sharing are mailed a letter notifying them of their enrollment and are provided the opportunity to opt-out of SoCalGas's program, if they choose.

SoCalGas continued to electronically exchange new CARE customer enrollment data on a weekly basis with SCE, a process established in PY2001. In PY 2025, SoCalGas enrolled 25,108 SCE CARE customers into SoCalGas's CARE program and recertified eligibility for 220,311 CARE customers to retain them for another two years.

During PY 2025, SoCalGas conducted a monthly data exchange with SDG&E. The exchanges resulted in 154 SDG&E CARE participants added to SoCalGas's CARE program.

SoCalGas continued a quarterly data exchange, established in PY2017, with PG&E. In PY 2025, the exchanges resulted in 2,303 PG&E CARE participants being enrolled into SoCalGas's CARE program.

On May 5, 2011, the CPUC adopted D.11-05-020, which required certain water and energy utilities with overlapping service territories to share low-income customer information in order to increase the participation rates of eligible customers in low-income assistance programs offered by each other. In 2012, SoCalGas implemented a twice-yearly (March and September) CARE customer data exchange of CARE enrollments with all participating water companies in SoCalGas service territory. In 2020, as a result of the CARE All-Party Meeting,⁴⁰ SoCalGas increased the frequency of customer data exchange with participating water companies and added an additional effort in July 2020. In 2025, SoCalGas completed quarterly data exchanges with eligible and participating water utilities and added 7,940 CARE participants from the low-income water rate assistance program. SoCalGas also participated in the CARE/CAP Data Sharing Annual Meeting held on December 9, 2025.

Joint Utility Program Managers Meeting: In PY 2025, SoCalGas, SCE, PG&E, SDG&E, and Southwest Gas scheduled monthly statewide CARE meetings and continued to meet regularly via TEAMS and held quarterly in-person workshops to discuss CARE outreach efforts and program operation topics, issues, the Low Income Application Decision, resolutions, enhancements, recommendations from the PEV Sub-working Group, and other relevant topics needing statewide utility discussion.

⁴⁰ Assigned Commissioner's Ruling in Response to May 22, 2020 All-Party Meeting On CARE Outreach in Light of COVID, June 15, 2020.

2.4.5 Discuss how CARE customer data and other relevant program information is shared within the utility, for example, between its Energy Savings Assistance Program and other appropriate low-income programs.

Leveraging with other assistance programs continues to be one of the most cost-effective ways for SoCalGas to increase customer participation in the CARE program. Therefore, customer information obtained from SoCalGas's ESA Program and GAF program, along with LIHEAP, is used for CARE enrollment, recertification, and verification purposes. SoCalGas maintained strong data governance and cybersecurity oversight to protect customer information when coordinating with other IOUs or third parties.

In PY 2025, SoCalGas continued cross-referencing customers who receive ESA Program benefits. Customers who are receiving benefits from the ESA Program are automatically enrolled for the CARE discount and PEV approved if their eligibility has been verified by the ESA Program. In PY 2025, SoCalGas enrolled 2,137 ESA Program customers in CARE.

SoCalGas's GAF program provides qualified customers a one-time bill assistance payment for their current balance. In 2025 SoCalGas grants of \$100 were awarded to all eligible customers. The annual, one-time bill payment assistance is available to eligible customers on a first-come, first-served basis. To assist customers in paying higher winter gas bills, the GAF program opened in February of 2025. The program continued until October 2025. The GAF program usually has the same income eligibility guidelines as CARE, allowing SoCalGas's GAF

customer data and CARE customer data to interface. Customers participating in the GAF program but not in the CARE program are automatically enrolled in CARE. Additionally, because GAF customers provide proof of income when applying, customers approved for GAF are automatically PEV approved.

CARE customers who are scheduled for recertification and who are approved for GAF assistance are not asked to recertify their CARE eligibility again until the next two-year recertification cycle. This process helps reduce barriers to participation and assists in retaining qualified customers.

Through leveraging efforts with SoCalGas’s GAF program, SoCalGas enrolled 370 new participants in its CARE program during PY 2025.

In PY 2025, the GAF program provided \$280,223.98 in customer assistance to 2,857 customers. Funds for the program came from donations from customers, employees and shareholders.

GAF Program	Funds Distribution
PY 2025	
Customer & Shareholder Contributions	\$338,231.85
Total Funds Available	\$308,509.40
Administrative Fees and stipends	\$29,722.45
GAF Payments	\$280,223.98
Customers Assisted (number)	2,857
Average Assistance	\$98.07

Two other customer assistance pilot programs offered by SoCalGas leverage its CARE participant data: the AMP and the Percentage of Income Pilot Program (PIPP). Eligibility for both programs is limited to CARE-enrolled customers.

Since 2021, the AMP has provided an opportunity for qualifying residential customers to have their eligible past due bills forgiven. Once enrolled, every time a current bill is paid in full and on time, SoCalGas will forgive 1/12 of the eligible debt. After 12 consecutive monthly natural gas bills are paid in full and on time, the full amount of the eligible debt will be forgiven (up to a maximum of \$8,000 per enrollment period). Since one of the qualifications for AMP is the customer must be a residential customer enrolled in CARE, customers are pre-screened for CARE enrollment prior being offered the payment plan. The SB 598 Annual Disconnection report can be referred to for AMP reporting data.

PIPP is a 4-year pilot program that began January 2023 and provides eligible CARE customers with a monthly utility bill cap. CARE and PIPP leverage its customers' household size and total household income information to verify income to determine program eligibility. Customers must first enroll in CARE prior to participation in the PIPP. PIPP is scheduled to conclude in February 2027.

2.4.6 Describe the efforts taken to reach and coordinate the CARE program with other related low-income programs to reach eligible customers.

CARE Outreach collaborates with the ESA Program at community events.

Outreach representatives were able to discuss multiple ways to save on energy

bills such as the CARE discount, weatherization, and/or repairs for residences. Please see section 1.7.1 above.

Additionally, CARE Outreach collaborates extensively with CalFresh program outreach. Efforts to reach and provide information on the CARE program to eligible customers occur at events such as FBO workshops (e.g., Catholic Charities of Orange County) and with food banks (e.g., FIND Food Bank which services Imperial and Riverside Counties, LAC + USC Medical Center CAREs Programs, Foodbank of Santa Barbara South County Outreach, Unity Shoppe and Food Share Ventura County).

2.4.7 Track Costs of AB 793 related Energy Management Technologies programs (identify all of the programs or initiatives that will be able to benefit from the availability of the end-use and electric usage profiles, and to coordinate with the relevant proceedings so that the relevant costs can be considered in those proceedings' cost-effectiveness decision-making).

SoCalGas's CARE program continues to update its My Account functionality allowing real-time CARE enrollment, CARE application processing, status updates, and facilitation of secure CARE recertification and PEV for all CARE residential customers. In addition, customers can view cost to date as well as historical usage information on My Account.

2.4.8 Describe the process for cross-referral of low-income customers between the utility and Department of Community Services and Development (CSD). Describe how the utility's CARE customer discount information is provided to CSD for inclusion in its federal funds leveraging application. (Note: These agreements are limited to sharing 1-800 phone numbers with customers and providing CARE benefit information for the federal fiscal year, October 1 of the current year through September 30 of the subsequent year. There are no tracking mechanisms in place to determine how many customers contact the other programs or are actually enrolled in other program(s) as a result of these agreements).

In May 2000, CSD and SoCalGas entered into an agreement to streamline resources and program benefits, enhancing collaboration between CSD's LIHEAP and SoCalGas's CARE and GAF programs. In June 2000, SoCalGas integrated the toll-free telephone numbers for LIHEAP (and the ESA Program) into the CARE applications. Additionally, SoCalGas began offering CSD's toll-free number to customers inquiring about low-income assistance programs. These cooperative efforts persisted throughout 2025.

For PY 2025, SoCalGas did not receive low-income customer information or requests for CARE data from CSD. SoCalGas maintained its collaboration with CSD by receiving LIHEAP payment data, which was utilized to apply LIHEAP assistance to eligible low-income customers' bills. For recipients of LIHEAP benefits, SoCalGas implemented an automated process that automatically PEV approves an account once a LIHEAP payment is posted to the account. Similarly, for customers benefiting from GAF, the placement of a GAF pledge on their account triggers automatic CARE PEV approval. This streamlined approach promotes efficient and seamless access to assistance programs for qualifying customers.

Through leveraging efforts, 590 customers who received LIHEAP payments and 370 customers who received a GAF pledge were automatically approved for CARE and exempt from PEV for one program enrollment cycle.

2.4.9 Discuss any recommendations to improve cost-effectiveness, processing of applications, or program delivery. Discuss methods investigated or implemented by the utility or third parties under contract to the utility to improve outreach and enrollment services to non-participating households in the prior year. Provide cost-effectiveness assessments, if available

SoCalGas continued operations of the CARE program using cost-effective and efficient channels.

All CARE-related mail is directly routed to an on-site team that is responsible for opening envelopes to sort and scan the documents. Within 24-48 hours, the scanned application images are then delivered to the CARE processing staff and processed through SoCalGas's existing system interface. In PY 2025, 187,162 scanned images were processed, including single page, multi-page, return, and Expanded Program applications.

SoCalGas processed over 119,710 paper applications (i.e., system generated, direct mail, and bill inserts) in PY 2025 via its content management systems.

SoCalGas continues to electronically manage all customer-returned documents for ease of processing and retrieval on its network. This improves program delivery for related issues and inquiries. The CARE processing staff can easily retrieve customer applications and manage issues accordingly.

SoCalGas continues to utilize best practices to maximize excellent customer service to support ease of enrollment, CARE approval, recertification, and PEV. Methods designed to increase enrollment and aid in the retention of CARE customers include CSR enrollment, web enrollment, IVR enrollment, mail or fax applications, outbound dial reminder calls, leveraging with internal and external low-income programs, approval of CARE on accounts pending turn-on, and outbound mail, e-mail and text notifications of a second recertification and PEV request.

The outbound reminder call alerts the customer that it is time to verify eligibility for CARE, or to renew enrollment, and to be aware that a request will arrive via mail within a few days. The second recertification or PEV application is mailed to customers who fail to respond within 45 days to the initial request. These remain best practices.

Immediate CARE approval on new accounts allows for preliminary CARE statuses (e.g., approved, incomplete, and denied) on accounts that are pending turn-on. As for leveraging, SoCalGas utilizes LIHEAP, ESA Program, and GAF participant information to enroll, recertify, and verify CARE eligibility. SoCalGas also utilizes SDG&E, SCE and PG&E CARE participant information to enroll customers. In PY 2025, SoCalGas continued to focus on efficient enrollment channels including CSR, My Account, and SoCalGas CARE website enrollments.

Mail Second PEV Application: A second PEV application is mailed to customers who do not respond within 45 days of the initial request. Customers who remain nonresponsive after this second notice are removed from the CARE program. As with the first PEV mailing, customers receive an automated call advising them that they must verify their eligibility and to expect another printed application in the mail. In addition, a bill message notifies the customer that SoCalGas has not yet received the required verification application or the necessary proof of income or participation in a qualifying assistance program.

Customers who are removed from CARE due to nonresponse and wish to re-enroll must submit proof of income or proof of participation in an eligible public assistance program if their CARE termination date is within the prior 24 months. Once 24 months have passed since the PEV-related termination, customers may re-enroll by completing a self-certification application without providing additional documentation.

CSR CARE Enrollment: In PY 2025, SoCalGas continued to offer an invaluable, simplified method of immediate phone enrollment through CSRs, originally implemented in February of 2018.

In its pursuit for continued improvement in customer service, SoCalGas explored ways to expand the category of customers who are enrolled by a CSR, and not limit it to initial gas service turn-ons, back-ons, and payment arrangements. As of

September 2023, the main Customer Contact Center began offering CARE enrollment to customers without limitation as standard procedure. In PY 2025, this resulted in 28,993 additional CARE enrollments via live CSR. In 2025, the Customer Contact Center successfully enrolled a total of 126,016 customers in CARE.

Mobile Home Park Utility Conversion Program (MHPUCP):

Since program inception, 476 mobile home parks have converted from master-metered and sub-metered to direct utility service, impacting over 36,172 tenants. In 2025, 64 mobile home parks were converted to direct utility. For these tenants who participate in CARE and MBL, the two programs have been seamlessly transferred to the customers' new gas accounts for the continued benefit of each program. As the MHPUCP account executives hold meetings at the respective parks to provide an overview of the MHP conversion, the account executives have continued to enroll additional tenants into CARE. An added benefit of the MHPUCP has been the conversion of master-metered accounts, where due to the meter configuration, the rate was not eligible for tenants to directly enroll in CARE. After becoming SoCalGas customers, these tenants are now entitled to directly receive the CARE discount.

My Account: Since September 2017 and implemented per D.17-12-009, CARE program enrollment, recertification and PEV web applications have continued to be accessible within My Account in English, Spanish, Chinese, Korean and

Vietnamese. CARE customers also have the option to opt-out of the program if they no longer wish to participate or no longer qualify. Once customers log into My Account, the message center alerts them of an option to apply for CARE to see if they qualify, or that they are due for recertification or PEV, depending on their real-time CARE status. Upon clicking the *Apply Now* link, the users are taken to a dedicated CARE program page within My Account. The CARE page is also accessible from the My Account homepage and *Ways to Save* dropdown menu. From the CARE page, customers see their current CARE status and may apply/recertify, submit verification or opt-out immediately. The enrollment, recertification and opt-out requests are processed in real-time and users receive confirmation immediately upon completing the application. In addition to confirmation messages within the page, automated confirmation emails are also sent to the applicant. With the PEV web application, customers can upload their required documents. Upon submission, users are notified within the page and via automated email that their application has been received and will be processed. PEV submissions are sent from the My Account database to the CARE Operations group for processing. Mobile versioning is also available for the My Account CARE page.

This implementation has increased CARE enrollments, reduced manual processing of applications, and improved customer service by providing real-time status updates and application confirmation. Another added benefit is the opportunity to promote the ESA Program to CARE-qualified customers who may

also qualify for the ESA Program. Promotional images linked to the ESA Program page are included in the CARE enrollment approval confirmation message and emails. In PY 2025, SoCalGas processed a total of 196,579 applications received through My Account.

SoCalGas.com Website: Throughout PY 2025, online applications submitted through the socialgas.com/CARE website were processed in real-time.

Additionally, all five languages *Apply Now* links navigate to a dedicated CARE page outside of My Account in the respective languages. From there, customers can look up their account number using various ID types.

Customers are then directed to the same CARE page used within My Account without needing to log in and may submit new CARE enrollments, recertifications, PEV documents, or opt-out requests directly from that page.

Beginning in PY 2022, online PEV submission became available to sub-metered customers and to users who do not have a My Account profile, in English, Spanish, Chinese, Korean, and Vietnamese. All PEV submissions are transmitted from the web platform to the CARE Operations team for processing.

Mobile-optimized access to the SoCalGas CARE website continues to be maintained to support customer usability across devices.

In PY 2025, SoCalGas processed a total of 33,108 web applications. This capability has improved customer service and expedited enrollments and

recertifications with instant processing.

2.4.10 Low CARE Enrollment ZIP Codes: Identify the low CARE enrollment ZIP codes, including the names of the cities, and discuss the strategies that were effective in targeting and enrolling these hard-to-reach households. Include the IOU's corrective plans and ME&O strategies to maintain and bolster enrollment in ZIP codes.

SoCalGas remained committed to targeting and engaging eligible households in low CARE penetration ZIP codes from January 2025 through July 2025. Efforts such as direct mail letters, emails, and text messaging resulted in a notable increase in program awareness within SoCalGas service territory. Due to the effectiveness of the above-mentioned strategies, SoCalGas recognized an opportunity for growth in its approach to customer retention, particularly concerning recertification and PEV completion. By implementing direct mailers and emails for customers that need to reapply, and SMS to customers who need to recertify, SoCalGas continued to focus on strengthening its CARE retention strategies. Thus, solidifying its connections with valued customers, allowing them to continue their participation uninterrupted. Looking ahead, SoCalGas will continue refining its retention efforts to sustain program participation and address its target demographics' specific challenges in these hard-to-reach areas.

2.5 Processing CARE Applications

2.5.1 Describe the utility's process for recertifying sub-metered tenants of master-meter customers.

The process for recertification of sub-metered tenants of master-metered accounts is the same as that of regular residential customers, meaning that recertification is

required every two years, or every four years for customers on a fixed-income. The annual earnings of customers on a fixed income do not fluctuate significantly from year to year and requiring them to recertify every two years was an unnecessary burden. In PY 2008, as authorized by the CPUC in D.06-12-038, SoCalGas implemented a four-year recertification period for self-declared customers on a fixed-income, receiving Social Security, pension, Supplemental Security Income, Social Security Disability, State Supplemental Program, and/or Medi-Cal benefits.

Tenants due to recertify are run through SoCalGas's Probability Model. Those with a probability score of a determined threshold or greater are granted automatic CARE recertification for an additional two years. Those with a probability below the determined threshold are mailed a recertification request.

Recertification applications are mailed directly to the sub-metered tenants when they are due to recertify. Each application is pre-populated with the tenant's name, facility identification number, unit number, and space or apartment number. Pre-population of applications was designed for tenants' simplified CARE renewal, ease of processing completed applications, and to aid in reducing attrition of CARE customers.

Several options for completing the recertification process are listed on the recertification application:

1. Visit socialgas.com/care and apply as a sub-metered tenant.
2. Call **1-866-716-3452** anytime 24 hours a day, with facility ID ready.
3. Return the completed and signed form by mail or fax to **(213) 244-4665**.

Recertification requires the tenant to provide the number of household occupants, total annual household income, or participation in a public assistance program.

Applications received via postal service are opened, scanned, and validated for processing efficiency. Tenants are informed they have 90 days to respond to the recertification request, however, SoCalGas allows 100 days to account for weekends and non-business days. For tenants who have not responded to the recertification request within 45 days of the initial mailing, a second reminder is sent. Non-responsive tenants are removed from CARE. If the recertification is received and approved after the 90-day timeframe, the tenant is re-enrolled in CARE.

The monthly *Add & Delete* report is mailed to each sub-metered facility notifying the facility of any tenants who were recently added to CARE or removed from the program. Additionally, each facility receives a complete monthly listing of its CARE tenants. In addition to CARE tenants, the listing also includes names and space numbers of those on MBL. The listing coincides with the mailing of the bill and is used to appropriately distribute the CARE discount and/or extra therms to the residents enrolled the programs.

The automatic monthly mailing of tenants on CARE and MBL has almost eliminated the daily phone calls from mobile home parks requesting a listing of tenants on the two assistance programs.

2.5.2 Describe any contracts the utility has with third parties to conduct certification, recertification and/or verification on the utility's behalf. Describe how these third-party efforts compare to the utility's efforts in comparable customer segments, such as hard-to-reach or under-served. Include comparisons of effectiveness and cost-effectiveness of comparable customer segments, if available.

SoCalGas does not contract with third parties to conduct certification, recertification and/or verification on its behalf. SoCalGas processes and approves all CARE enrollment applications, recertification forms, and verification requests in-house. Additionally, SoCalGas utilizes LIHEAP, ESA Program, and GAF participant information to enroll, recertify, and verify CARE eligibility. SoCalGas also utilizes PG&E, SDG&E, SCE, and water utilities' CARE participant information to enroll customers.

In PY 2025, SoCalGas worked with approximately 40 community partners, one active capitation agency, as well as one third-party outreach contractor to help eligible non-participating customers sign up for the CARE program. The CARE Capitation agency employed a multipurpose approach by helping their clients complete a CARE application, while also assisting the customers in enrolling in other programs they might be eligible for. New agencies are accepted based on SoCalGas's geographic needs and the agency's ability to incorporate the program into their existing services.

SoCalGas’s third-party CARE outreach contractor employed a variety of outreach strategies, such as door-to-door solicitation, local community event participation, and program material distribution to help customers apply for CARE. Many of the customers targeted by the third-party CARE contractor do not respond to traditional forms of outreach, do not visit CBO facilities, and are much more receptive to door-to-door canvassing efforts. In PY 2025, SoCalGas assigned specific counties to the third-party outreach contractor so they could focus on less penetrated SoCalGas territories and provide better customer service.

During PY 2025, the number of customers enrolled in CARE by SoCalGas’s CARE Capitation CBOs was 4 customers, and 10,776 new enrollments were derived from CARE’s third-party canvassers’ efforts.

2.6 Program Management

2.6.1 Discuss issues and/or events that significantly affected program management in the reporting period and how these were addressed.

SoCalGas’s CARE program did not experience any notable issues or events that significantly affected program management during PY 2025.

2.7 Pilots

No pilots were conducted in 2025.

2.8 Studies

Table: CARE Studies				
Study	Lead Consultant	Contracting IOU	Project Initiation	Project Completion
2025 Low Income Needs Assessment (LINA) ⁴¹	Evergreen Economics	SoCalGas	Jan 2024	Oct 31, 2025
2025 CHANGES Evaluation ⁴²	Verdant Associates	PG&E	Mar 2025	Dec 2025

2025 Community Help and Awareness with Natural Gas and Electricity Services (CHANGES) Evaluation

The 2022–2024 Evaluation of the CHANGES Program was conducted in compliance with CPUC D. 21-06-015, which requires at least two sequential, third-party evaluations of the program. The first evaluation was completed in June 2023. Planning for the second CHANGES evaluation began in November 2023 following direction from Commission staff in the Consumer Affairs Branch and ED.

After a competitive solicitation, Verdant Associates was selected as the third-party evaluator, and the project was initiated in March 2025. The final evaluation report, posted to the PDA site on December 23, 2025, examined how effectively CHANGES supports LEP utility customers across California and assessed whether the program’s design continues to meet evolving customer needs.

⁴¹ The 2025 LINA study was authorized in D.21-06-015 for \$500,000 (OP 167). The final project budget was \$499,911, of which SoCalGas is responsible for a 25% cost share.

⁴² The first evaluation spent \$245,011.50, leaving a remaining budget of up to \$177,989 for the second evaluation. The second evaluation used \$172,858, of which SoCalGas’ cost share is 25%.

The evaluation focused on two primary research areas:

1. Benchmarking Analysis – identifying whether similar programs exist in other states and extracting best practices related to service delivery, staffing, and customer support.
2. Market Profile Analysis – evaluating whether the current CHANGES implementation model and CBO network remain adequate to serve California’s increasingly diverse LEP communities.

The study reviewed CHANGES’ statewide network of CBOs, which provide culturally competent case management, consumer education, and outreach. These services help households resolve billing disputes, understand arrearages, enroll in assistance programs such as CARE/FERA and LIHEAP, and manage their utility services with an annual authorized budget of \$1.7 million.

Stakeholder engagement was a major component of the evaluation. A public webinar held in May 2025 provided an opportunity for feedback on the draft evaluation plan. Draft findings were presented at a December 2025 public workshop before publication of the final report.

Findings confirmed that CHANGES is a unique, non-duplicative statewide resource. No directly comparable programs in other states provide the same combination of language access and individualized case assistance.

Benchmarking insights highlighted the importance of staff training and retention, integrating plain language standards, and using program participation data to guide improvements.

The evaluation also identified strong, ongoing demand for individualized case assistance and energy education, driven by complex billing issues, arrearage management, and the needs of immigrant and LEP households. Barriers such as privacy concerns, fear of interacting with utilities, and challenges navigating IOU systems further underscore the value of CHANGES trusted, community embedded service model.

A geospatial analysis recommended increasing service levels in Riverside, Kern, and Contra Costa counties. Additional counties with large LEP populations but limited CHANGES activity—including Tulare, Imperial, Merced, and Kings—were identified as areas requiring expanded support. In contrast, certain areas such as Madera County were found to have disproportionately higher program activity.

The evaluation also included a funding assessment. With program funding remaining flat at approximately \$1.76 million since 2016, the study concluded that increases to \$2.6–\$2.7 million annually are warranted to account for inflation, increased service needs, and unmet demand.

Recommendations include strengthening language and cultural competency resources, improving program data systems and administrative processes, enhancing coordination between IOUs and CBOs, modernizing program materials

using plain language standards, and reassessing CBO service coverage to better align with current LEP population needs.

OP 22 of D. 21-06-015 approved an evaluation budget capped at 4% of the combined 2021–2026 authorized CHANGES budgets, totaling \$423,000 (4% of \$10,575,012) to fund at least two sequential third-party evaluations.

2.9 CARE Working Groups and Sub-working Groups (SWG) CARE/FERA PEV SWG

Identify recommendations provided by the Working Group to improve program performance that were adopted by the IOU.

In December 2022, the Commission issued D.22-12-029⁴³ and ordered the IOUs to form a SWG under the ESA WG to focus on improving the income verification procedures and policies, with the ED having the ability to periodically update the scope of the WG’s role and resolve potential disagreements among stakeholders. The CARE/FERA SWG was established in February 2023 and met biweekly for six months. CARE/FERA PEV SWG members included IOUs, ED, Cal Advocates, ValleyCan, Liberty Utility, and other ad hoc members. The SWG was facilitated by a representative from Statwizards, LLC.

The CARE PEV SWG developed recommendations that could be implemented in the current program and proposed in the next program application cycle,

⁴³ D.22-12-029, OP 2.

developed recommendations for additional reporting requirements in the annual CARE/FERA reports to include data on customers removed from CARE due to non-response during recertification or PEV compared to other classes of customers, and explored the CalFresh Confirm Hub tool and other data-sharing partnerships to verify customer income eligibility before requesting recertifications and PEV.

Pursuant to D.22-12-029, the IOUs held a public meeting to discuss the SWG's recommendations and ideas that could be immediately implemented by the IOUs. Additionally, the recommendations of the SWG, next steps to implement any recommendations, as well as discussions and activities related to other initiatives and directives as part of D.21-06-015 were submitted as part of the IOUs' Midcycle Progress Report.⁴⁴ Although the ESA WG recommended that the CARE/FERA PEV SWG conclude in 2023, the IOUs continue to meet during their scheduled joint utility meetings to discuss and adopt best practices and processes. The CARE/FERA PEV SWG ended activity at the close of the 2023 PY and the IOUs presented their conclusive annual findings in the ESA WG June Public Meeting in 2024.

⁴⁴ IOUs ESA Program Midcycle Progress Report at 81.

In 2025, the IOUs and Southwest Gas met monthly and quarterly in person to share topics such as program alignment, concerns and issues, best practices, and progress on the Low-Income Application Filing.

2.10 Miscellaneous

2.10.1 Describe efforts contained in Attachment 6 of the Joint Stipulation adopted in D.21-06-015.

In the PYs 2021-2026 Low Income Application proceeding, the CETF recommended that CARE and ESA Program customers be informed of reduced-cost affordable broadband offers through marketing. CETF's proposal sought outreach in the IOUs' ME&O efforts, customer referral to CETF-designated CBOs, and addition of a website link onto utility websites. CETF, SoCalGas, PG&E, SDG&E, and SCE entered into a Joint Stipulation to accomplish affordable broadband offer marketing. The Joint Stipulation⁴⁵ was adopted by the Commission and authorizes the use of CARE and ESA Program dollars to market affordable broadband for 2021 through 2026. Among the agreements in the Joint Stipulation, SoCalGas agreed to add a weblink to its website, providing a contact to obtain further information. It also integrated an affordable broadband offer into select customer assistance program direct marketing materials biannually as determined at the discretion of each IOU. CETF also included affordable broadband offer notifications into ESA Program Energy Education materials

⁴⁵ See Joint Stipulation of Southern California Gas Company, San Diego Gas & Electric Company, Pacific Gas and Electric Company, Southern California Edison Company and California Emerging Technology Fund, filed November 4, 2019.

provided to customers during the enrollment process. Finally, CETF had the opportunity to present affordable broadband opportunities to CBOs and ESA Program contractors during the IOUs respective relevant meetings. In 2025, CETF was promoted on SoCalGas's website (socalgas.com/Assistance and socalgas.com/Asistencia) and via monthly CARE emails to residential customers. In addition to promoting CETF via marketing channels, SoCalGas includes CETF information in ongoing CBO training presentations. On November 1, 2025, CETF submitted Opening Testimony to request that the IOUs continue this successful partnership during 2027 bridge year. SoCalGas will continue to cross-promote affordable broadband messaging when relevant and appropriate in 2026.

2.10.2 CARE Probability Model Updates

Compared to the last model implemented SoCalGas has been continuously monitoring, evaluating, and improving the performance of its probability model. The model is part of Machine Learning Operations Department and learns from past CARE customer verification outcomes. Several automated processes support its use in operations. The model implemented on September 27, 2024 achieved an accuracy of 74.49%.

In 2025, the model was refreshed 4 times (retrained on a quarterly basis). The model was last refreshed in October 2025 and has an improved accuracy of 78.24%. This update included new thresholds for PEV and auto recertification. Model accuracy and coefficient values remained stable. No major performance changes were observed.

The CARE Model thresholds and features (October 2025) are listed below:

- PEV threshold = 0.5415 (previously 0.5618)
- Auto recertification threshold = 0.8115 (previously 0.7997)

Feature Description	Positive or Negative Score Impact
Cash only program enrollment flag	+
Level Pay Plan program enrollment flag	-
My Account program enrollment flag	+
Paperless program enrollment flag	+
Payment extension program enrollment flag	+
Enrolled by auto-enrollment flag	+
Enrolled by door-to-door flag	-
Enrolled by mail flag	-
Enrolled by phone flag	+
Enrolled by web flag	+
Number of years in CARE program	+
Food Stamp program enrollment flag	+
Fix income program enrollment flag	+
LIHEAP program enrollment flag	+
Medical Cal program enrollment flag	+
Previously de-enrolled from CARE flag	+
Category eligible flag	+
Income eligible flag	-
Household Occupancy	+
Total household income	-
Medical Baseline program enrollment flag	+
Multiple customers in the same unit flag	+
Payment used flag	/
Line-Item Billing program enrollment flag	+
Last 12 months payment extension flag	+
Mature high income Prizm segment flag	-

3. CARE EXPANSION PROGRAM

3.1 Participant Information

3.1.1 Provide the total number of residential and/or commercial facilities by energy source by month for the reporting period.

See CARE Table 12 in the attachments.

3.1.2 State the total number of residents (excluding caregivers) for residential facilities, and for commercial facilities, by energy source, at year-end.

There were 21,084 residents in the non-residential CARE Expansion Program facilities, comprised of 660 primary facilities with 290 associated satellite facilities, and 46 farmworker housing facilities participating in the CARE Expansion Program at PY 2025 year-end.

3.2 Usage Information

3.2.1 Provide the average monthly usage by energy source per residential facility and per commercial facility.

See CARE Table 12 in the attachments.

3.3 Program Costs

3.3.1 Administrative Cost (Show the CARE Expansion Program's administrative cost by category).

SoCalGas incurred \$1,338.63 in marketing expenses for approximately 16,435 CARE Non-Profit Group Living (NPGL) facilities bill inserts in PY 2025. Due to the number of participants, SoCalGas does not separately track administrative labor costs for new CARE Expansion applications received during PY 2025.

3.3.2 Discount Information.

3.3.2.1 State the average annual CARE discount received per residential facility by energy source.

The average annual discount received per participating CARE residential facility in PY 2025 was \$114.22.⁴⁶

3.3.2.2 State the average annual CARE discount received per commercial facility by energy source.

The average annual discount received per participating CARE Expansion Program facility in PY 2025 was \$899.29.⁴⁷

3.4 Outreach

3.4.1 Discuss utility outreach activities and those undertaken by third parties on the utility's behalf.

Annually, SoCalGas sends a bill insert to commercial customers informing them of the NPGL Rate. In addition, SoCalGas worked with Regional Public Affairs personnel in rural counties to promote program awareness for low-income farm workers. To enhance outreach in rural counties, SoCalGas continues to work with Chavez Radio Group in Visalia and Bakersfield to reach farm workers. During PY 2025, Chavez Radio Group provided opportunities for SoCalGas to participate in events, such as *Cuadrilla De La Semana*, which are weekly visits to farmworkers in their workplaces. Food, musical entertainment, and information

⁴⁶ Average annual discount is dependent on the sales and transport gas revenue as well as the number of CARE customers by climate zone.

⁴⁷ *Ibid.*

from SoCalGas regarding the CARE program are part of these lunch break sessions.

SoCalGas used a variety of channels to increase awareness of the CARE program in 2025, including agricultural and farmworker housing facilities and others living in eligible commercial facilities. In August 2025, SoCalGas also sent out a bill insert to approximately 16,435 eligible customers. This bill insert described the CARE rate for the expansion program. SoCalGas continued to leverage the relationships of its Regional Public Affairs personnel in developing grassroots relationships with organizations such as Chavez Radio Group and MICOP that work closely with agricultural and migrant workers to continue to educate members about SoCalGas's Customer Assistance Programs.

3.4.2 Discuss the most effective outreach method, including a discussion of how success is measured.

Throughout PY 2025, the SoCalGas team continued outreach efforts within the multifamily affordable housing segment to support facility-level CARE participation. However, following the updated CARE application language requiring that all tenants at a given master-metered facility qualify in order for the property to be enrolled at the multifamily level, SoCalGas received consistent feedback from property ownership and management groups regarding implementation challenges.

Specifically, tenant turnover and fluctuating household income levels create practical difficulties in maintaining 100% building-level eligibility over time. Ownership groups expressed concern regarding the administrative burden associated with verifying eligibility across all dwelling units, as well as the potential compliance risk should tenant composition change post-enrollment. In response to the enrollment barriers observed during PY2025 implementation, SoCalGas plans to refine the 2026 outreach strategy to place a greater emphasis on transitional and supportive housing portfolios, where tenant income stability and program eligibility can be more consistently verified at the property level.

3.4.3 Discuss how the CARE facility data and relevant program information is shared by the utility with other utilities sharing service territory.

There was no facility data sharing during PY 2025.

3.4.4 Discuss barriers to participation encountered in the prior year and steps taken to mitigate these, if feasible, or not, if infeasible.

SoCalGas did not experience any barriers in PY 2025.

3.4.5 Discuss any recommendations to improve the cost-effectiveness, application processing, or program delivery. Discuss methods investigated or implemented by the utility or third parties on the utility's behalf to improve outreach and enrollment services to non-participating facilities in the prior year. Provide cost-effectiveness assessments, if available.

The application and recertification process for CARE Expansion customers was automated in October 2024. Under this enhanced workflow, returned applications are scanned and electronically routed to a completion queue, allowing staff to

process, review, and upload them to CARE Program’s records-retention system, with significantly improved efficiency. This automation enables faster access, review, and approval of applications and represents a substantial improvement over the prior manual process. The enhancement was fully in place for PY 2025 and greatly streamlined program administration. In 2025, all Expanded CARE accounts were up for recertification, and the automated process supported the recertification workflow. The automation continues to improve cost effectiveness by reducing manual processing time, minimizing errors, and streamlining review and approval workflows.

3.5 Program Management

3.5.1 Discuss issues and/or events that significantly affected program management in the reporting period and how these were addressed.

SoCalGas’s CARE program did not experience any issues or events that significantly affected program management during PY 2025.

4. FUND SHIFTING

4.1 Report Energy Savings Assistance Program fund shifting activity that falls within rules laid out in Section 10.5.8.2 of D.21-06-015.

See ESA Table 11 in the attachments.

4.2 Report CARE fund shifting activity that falls within rules laid out in Section 10.5.8.2 of D.21-06-015.

See CARE Table 1 in the attachments.

4.3 Was there any Energy Savings Assistance Programs or CARE fund shifting activity that occurred that falls OUTSIDE the rules laid out in Section 10.5.8.2 of D. 21-06-015?

Any fund shifting activity performed in PY 2025 is in compliance with fund shifting rules as laid out in D.21-06-015.

5. COMMONLY USED ACRONYMS

AB	Assembly Bill
ACS	American Community Survey
AE	Account Executive
AL	Advice Letter
ALJ	Administrative Law Judge
AMP	Arrearage Management Plan
APU	Anaheim Public Utilities
BIA GA	Bureau of Indian Affairs General Assistance
BPO	Branch Payment Office
CALMAC	California Measurement Advisory Council
CAM	Common Area Measure
CAP	Customer Assistance Program
CARE	California Alternate Rates for Energy
CBO	Community Based Organization
CCC	Customer Contact Center
CCT	Customer Comment Tracking
CE	Categorical Eligibility
CEDARS	California Energy Data and Reporting System
CETF	California Emerging Technology Fund
CforAT	Center for Accessible Technology
CHANGES	Community Help and Awareness with Natural Gas and Electricity Services Pilot Program
CIS	Customer Information System
CPUC	California Public Utilities Commission
CSD	California Department of Community Services and Development
CTR	Click-through Rate

CSR	Customer Service Representative
CWR	Career & Workforce Readiness
D.	Decision
DAC	Disadvantaged Community
E&A	Enrollment & Assessment
ED	Energy Division
EE	Energy Efficiency
EE Guide	Energy Efficiency Guide
EM&V	Evaluation, Measurement & Verification
ESA	Energy Savings Assistance Program
ESA WG	Energy Savings Assistance Program Working Group
ESA WH	Energy Savings Assistance Whole Home
ESACET	Energy Savings Assistance Cost Effectiveness Test
eTRM	Electronic Technical Reference Manual
FBO	Faith Based Organization
FERA	Family Electric Rate Assistance
FPG	Federal Poverty Guideline
FPL	Federal Poverty Level
FS	Food Service
GAF	Gas Assistance Fund
GIS	Geographic Information System
HAS	Human Service Association
HCS	Health, Comfort & Safety
HE	High Efficiency
HEAT	Home Energy Assistance Tracking
HER	Home Energy Report
HHS	Health & Human Services
HISR	Home Improvement Salesperson Registration
HTR	Hard to Reach
HVAC	Heating, Ventilation, Air Conditioning
IEET	Integrated Energy Efficiency Training
IOU	Investor Owned Utility
IQP	Income Qualified Program
IS	Installation Standards
IVR	Integrated Voice Recognition
LADWP	Los Angeles Department of Water and Power

LED	Light Emitting Diode
LEP	Limited English Proficient
LIHEAP	Low Income Home Energy Assistance Program
LINA	Low Income Needs Assessment
LIRA	Low Income Rate Assistance
LIOB	Low Income Oversight Board
MBL	Medical Baseline Allowance
ME&O	Marketing Education & Outreach
MF	Multifamily
MFES	Multifamily Energy Savings
MFWB	Multifamily Whole Building
MH	Mobile Home
MHPUCP	Mobile Home Park Utility Conversion Program
MOU	Memorandum of Understanding
M&O	Marketing & Outreach
NEB	Non Energy Benefit
NEI	Non-Energy Impact
NGAT	Natural Gas Appliance Testing
NMEC	Normalized Metered Energy Consumption
NPGL	Non-Profit Group Living
OBF	On Bill Financing
OP	Ordering Paragraph
PATH	People Assisting the Homeless
PBI	Performance Based Incentive
PEV	Post Enrollment Verification
PDA	Public Document Area
PG&E	Pacific Gas and Electric Company
POA	Property Owner Authorization
PP	Policies & Procedures
PP&IS	Policies & Procedures and Installation Standards
PP/D	Pilot Plus/Deep
PUC	Public Utilities Code
PY	Program Year
RFP	Request for Proposal
RHA	Richard Heath & Associates
RI	Resource Innovations

RHF	Retirement Housing Foundation
SB	Senate Bill
SCE	Southern California Edison Company
SCRS-IL	Southern California Resource Services for Independent Living
SDG&E	San Diego Gas & Electric Company
SEC	Service Establishment Charge
SF	Single Family
SoCalGas	Southern California Gas Company
SPOC	Single Point of Contact
SWG	Sub-working Group
TOWT	Time of Week and Temperature
UAS	Universal Application System
VL	Veteran's Legal Institute
WCAG	Web Content Accessibility Guidelines
WG	Working Group
WIC	Women, Infants and Children

6. APPENDIX A: COLLATERAL MATERIALS

6.1 ESA Program Tables

Summary Table

ESA Program – Expenses and Energy Savings by Program

ESA Program- Table 1 - Program Expenses – ESA Main

ESA Program- Table 2 - Expenses & Energy Savings by Measures Installed –
ESA Main

ESA Program – Table 2A – Expenses & Energy Savings by Measures Installed –
Multifamily Whole Building

ESA Program – Table 2B – Expenses & Energy Savings by Measures Installed –
Pilot Plus and Pilot Deep

ESA Program – Table 2C – Expenses & Energy Savings by Measures Installed –
CSD Leveraging

ESA Program- Table 3 - Cost Effectiveness

ESA Program- Table 4 - Detail by Housing Type and Source

ESA Program- Table 5 - Direct Purchases & Installation Contractors

ESA Program- Table 6 - Installation Cost of Program Installation Contractors

ESA Program- Table 7 - Expenditures Recorded by Cost Elements

ESA Program- Table 8 - Homes Unwilling/Unable to Participate

ESA Program- Table 9 - Energy Rate Used for Bill Savings Calculations

ESA Program- Table 10 - Bill Savings Calculations by Program Year

ESA Program- Table 11 - Fund Shifting

ESA Program- Table 12 - Categorical and Other Enrollment

ESA Program- Table 13A - Leveraging & Integration

ESA Program – Table 13B Clean Energy Referral, Leveraging and Coordination

ESA Program – Table 14 - Expenditures for Pilots and Studies

ESA Program – Table 15 - Tribal Outreach

ESA Program – Table 16 – Customer Segment/Need State

6.2 CARE Tables

CARE Table 1 - Overall Program Expenses

CARE Table 2 - Enrollment, Recertification, Attrition, and Penetration

CARE Table 3 – Post Enrollment Verification Results

CARE Table 3A-B – Post Enrollment Verification Re-Enrollment Rates

CARE Table 4 - Self Certification and Re-Certification Applications

CARE Table 5 - Enrollment by County

CARE Table 6 - Recertification Results

CARE Table 7 - Capitation Contractors

CARE Table 8 - Participants as of Month End

CARE Table 9 - Average Monthly Usage & Bill

CARE Table 10 - Surcharge & Revenue

CARE Table 11 - Capitation Applications

CARE Table 12 - Expansion Program

CARE Table 13 - High Usage Verification Results

CARE Table 14 - Customer Usage and ESA Program Treatment

CARE Table 15 - Categorical Enrollment

CARE Table 16 – CARE and Disadvantaged Community Enrollment

6.3 Tribal Outreach Contacts⁴⁸

⁴⁸ Because Section 6.3, Tribal Outreach Contacts, which was included in the original Annual Report (subject to SoCalGas's Motion for Leave to File Under Seal filed on May 1, 2026) is not being amended, it is not included in this Amended Report.

**Energy Savings Assistance Program
And
California Alternate Rates for Energy Program
PY 2025* Summary Highlights
SOUTHERN CALIFORNIA GAS COMPANY**

Amended results noted in red font and underlined

2025 Energy Savings Assistance Program Summary			
2025	Authorized / Planning Assumptions	Actual	%
Budget ¹	\$ 122,849,884	<u>\$ 105,201,598</u>	<u>86%</u>
Summary Homes Treated	69,837	<u>45,535</u>	<u>65%</u>
Summary kWh Saved	N/A	N/A	N/A
Summary kW Demand Reduced	N/A	N/A	N/A
Summary Therms Saved ³	1,435,220	<u>1,578,857</u>	<u>110%</u>

* D.21-06-015 permits IOUs to carry forward funds for committed work started in 2025 but finished in 2026.

¹ Budget reflects the authorized funding in D.21-06-015.

³ Per D.21-06-015, authorized therms saved goal is for the entire portfolio with the exception of Pilot Plus/Pilot Deep.

2025 CARE Program Summary			
2025	Authorized Budget ¹	Actual	%
Administrative Expenses	\$ 10,774,132	\$ 8,150,127	76%
Subsidies	\$ 139,795,171	\$ 194,028,869	139%
Service Establishment Charge	\$ 3,469,810	\$ 2,382,240	69%
Total Program Costs and Discounts	\$ 154,039,113	\$ 204,561,236	133%
2025 CARE New Enrollments	Automatically Enrolled via Data Sharing, ESA Participation, etc	Self Certified as Categorically Eligible	Self Certified as Income Eligible
Method	53,648	136,080	90,552
2025 CARE Enrollment	Estimated Eligible Participants	Participants	Enrollment Rate
Total Enrolled	1,586,607	1,729,600	109%

¹ Reflects the authorized funding per year in D.21-06-015.

PY 2025* Low Income Annual Report
ESA Program Summary
Expenses and Energy Savings by Program
SOUTHERN CALIFORNIA GAS COMPANY

Amended results noted in red font and underlined

ESA Expense Summary

ESA Program:	Authorized Budget			Year to Date Expenses			% of Budget Spent YTD		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
ESA Main Program (SF, MH)	N/A	\$ 95,388,391	\$ 95,388,391	N/A	<u>\$ 88,447,808</u>	<u>\$ 88,447,808</u>	N/A	<u>93%</u>	<u>93%</u>
ESA Multifamily Whole Building ^{1,2}	N/A	\$ 20,950,948	\$ 20,950,948	N/A	\$ 15,085,731	\$ 15,085,731	N/A	72%	72%
ESA Pilot Plus and Pilot Deep ¹	N/A	\$ 6,510,545	\$ 6,510,545	N/A	\$ 1,668,060	\$ 1,668,060	N/A	26%	26%
CSD Leveraging	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	0%	0%
Building Electrification Retrofit Pilot ³	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	0%	0%
Clean Energy Homes New Construction Pilot ³	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	0%	0%
SASH and MASH Unspent Funds ⁴	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	0%	0%
ESA Program TOTAL	N/A	\$ 122,849,884	\$ 122,849,884	\$ -	<u>\$ 105,201,598</u>	<u>\$ 105,201,598</u>	N/A	<u>86%</u>	<u>86%</u>

* D.21-06-015 permits IOUs to carry forward funds for committed work started in 2025 but finished in 2026. SoCalGas allowed its ESA Program contractors to complete and invoice such committed work by March 27, 2026 (the committed funds period). The amended results for main ESA Program include the committed funds period.

¹ Includes only expenses verifies in SoCalGas SAP.

² Per the co-funding agreement for the Southern California Multifamily Whole Building Program, each non-lead party shall issue their funding contribution to the lead party. SoCalGas's funding contribution for 2025 was \$13,845,493.13. The Lead Party shall track: (1) the Monthly Payments it receives from the Non-Lead Parties, (2) its Monthly Payment transferred to its MFWB account; (3) all expense incurred by the Lead Party as the lead program administrator for the Program and payments made to an Implementer under the applicable Implementer Contract(s) ("Program Costs"); and (4) the applicable Interest Payments for each Non-Lead Party.

³ Applicable to SCE only.

⁴ Applicable to electric utilities only.

ESA Energy Savings Summary

ESA Program:	Authorized / Forecasted Planning Assumptions			Year to Date Actual			% of Savings		
	kWh	kW	Therms	kWh	kW	Therms	kWh	kW	Therms
ESA Main Program (SF, MH) ¹	N/A	N/A	1,435,220	N/A	N/A	<u>1,162,289</u>	N/A	N/A	<u>81%</u>
ESA Multifamily Whole Building	N/A	N/A	N/A	N/A	N/A	<u>416,576</u>	N/A	N/A	0%
ESA Pilot Plus and Pilot Deep ³	N/A	N/A	N/A	N/A	N/A	9,978	N/A	N/A	0%
CSD Leveraging	N/A	N/A	N/A	N/A	N/A	-	N/A	N/A	0%
Building Electrification Retrofit Pilot ²	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	0%
Clean Energy Homes New Construction Pilot ²	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	0%
ESA Program TOTAL	N/A	N/A	1,435,220	N/A	N/A	<u>1,578,857</u>	N/A	N/A	<u>110%</u>

¹ Authorized/forecasted planning assumption is for entire portfolio, less Pilot Plus/Pilot Deep.

² Applicable to SCE only.

³ Pilot Plus/Deep energy savings are not part of the portfolio savings.

**PY 2025* Low Income Programs Annual Report
 ESA Program Table 1
 Main ESA Program (SF, MH) Expenses
 SOUTHERN CALIFORNIA GAS COMPANY**

Amended results noted in red font and underlined

ESA Program:	2025 Authorized Budget ¹			2025 Annual Expenses ²			% of Budget Spent		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Energy Efficiency									
Appliances	N/A			N/A	\$ 2,325,618	\$ 2,325,618	N/A		
Domestic Hot Water	N/A			N/A	\$ 20,035,284	\$ 20,035,284	N/A		
Enclosure	N/A			N/A	\$ 15,012,348	\$ 15,012,348	N/A		
HVAC	N/A			N/A	\$ 20,111,277	\$ 20,111,277	N/A		
Maintenance	N/A			N/A	\$ 10,351,291	\$ 10,351,291	N/A		
Lighting	N/A			N/A			N/A		
Miscellaneous ⁴	N/A			N/A	\$ 213,462	\$ 213,462	N/A		
Customer Enrollment	N/A			N/A	\$ 8,471,949	\$ 8,471,949	N/A		
In Home Education	N/A			N/A	\$ 1,241,322	\$ 1,241,322	N/A		
Pilot ³	N/A			N/A			N/A		
Energy Efficiency TOTAL	N/A	\$ 82,850,295	\$ 82,850,295	N/A	\$ 77,762,550	\$ 77,762,550	N/A	94%	94%
Funded Outside of ESA Program Budget									
Training Center	N/A	\$ 810,413	\$ 810,413	N/A	\$ 555,740	\$ 555,740	N/A	69%	69%
Workforce Education and Training	N/A	\$ -	\$ -	N/A			N/A	0%	0%
Inspections	N/A	\$ 1,561,997	\$ 1,561,997	N/A	\$ 1,366,066	\$ 1,366,066	N/A	87%	87%
Marketing and Outreach	N/A	\$ 1,437,876	\$ 1,437,876	N/A	\$ 1,055,584	\$ 1,055,584	N/A	73%	73%
Statewide Marketing Education and Outreach	N/A	\$ -	\$ -	N/A			N/A	0%	0%
Studies	N/A	\$ 231,250	\$ 231,250	N/A	\$ 41,731	\$ 41,731	N/A	18%	18%
Regulatory Compliance	N/A	\$ 536,772	\$ 536,772	N/A	\$ 474,308	\$ 474,308	N/A	88%	88%
General Administration	N/A	\$ 7,855,757	\$ 7,855,757	N/A	\$ 7,174,911	\$ 7,174,911	N/A	91%	91%
CPUC Energy Division	N/A	\$ 104,031	\$ 104,031	N/A	\$ 16,918	\$ 16,918	N/A	16%	16%
Administration Subtotal	N/A	\$ 12,538,096	\$ 12,538,096	N/A	\$ 10,685,258	\$ 10,685,258	N/A	85%	85%
TOTAL PROGRAM COSTS	N/A	\$ 95,388,391	\$ 95,388,391	N/A	\$ 88,447,808	\$ 88,447,808	N/A	93%	93%
ESA Program Administrative Expenses									
Administrative Costs				N/A	\$ 9,032,202	\$ 9,032,202			
Total Program Costs				N/A	\$ 88,447,808	\$ 88,447,808			
% of Administrative Spend					10.2%	10.2%			

* D.21-06-015 permits IOUs to carry forward funds for committed work started in 2025 but finished in 2026. SoCalGas allowed its ESA Program contractors to complete and invoice such committed work by March 27, 2026 (the committed funds period). The amended results for main ESA Program include the committed funds period.

¹ Reflects the authorized funding in D.21-06-015. Energy Efficiency budget authorized for total budget only.

² Total program cost stated here does not include MF-CAM and M&E costs funded out of unspent funds from previous cycle.

³ Pilot Plus/Deep activity reported separately in Table 2B.

⁴ Miscellaneous includes Performance Based Incentive (PBI) costs and chargebacks.

PY 2025* Low Income Programs Annual Report

ESA Program Table 2

Main ESA Program (SF, MH) Expenses and Energy Savings by Measure Installed
SOUTHERN CALIFORNIA GAS COMPANY

Amended results noted in red font and underlined

Main ESA Program Total
2025 Completed & Expensed Installation

Measures [8]	Basic	Plus	Units	Quantity Installed	kWh [1] (Annual)	kW [1] (Annual)	Therms [1] (Annual)	Expenses (\$)	% of Expenditure	Effective Useful Life (Years)	2025 Total Measure Life Cycle Bill Savings
Appliances											
High Efficiency Clothes Washer		X	Home	<u>2,209</u>			<u>43,462</u>	<u>\$ 2,325,618</u>	3.3%	11	<u>\$ 798,397</u>
Refrigerators		N/A	Each						0.0%	-	\$ -
Freezers		N/A	Each						0.0%	-	\$ -
Clothes Dryer		N/A	Each						0.0%	-	\$ -
Dishwasher		N/A	Each						0.0%	-	\$ -
Domestic Hot Water											
Other Domestic Hot Water [2]			Home	<u>39,194</u>			<u>123,853</u>	<u>\$ 2,386,541</u>	3.4%	10	<u>\$ 2,068,346</u>
Water Heater Tank and Pipe Insulation [3]		X	Home	<u>10,282</u>			<u>65,291</u>	<u>\$ 365,303</u>	0.5%	9	<u>\$ 981,319</u>
Thermostatic Shower Valve		X	Home	<u>30,878</u>			<u>50,331</u>	<u>\$ 1,779,742</u>	2.6%	10	<u>\$ 840,530</u>
Tub Diverter/ Tub Spout		X	Home	<u>5,549</u>			<u>31,185</u>	<u>\$ 855,962</u>	1.2%	10	<u>\$ 520,796</u>
Water Heater Repair/Replacement			Each	<u>2,473</u>			<u>5,910</u>	<u>\$ 7,043,707</u>	10.1%	11	<u>\$ 108,575</u>
Tankless Water Heater			Each	<u>1,926</u>			<u>171,816</u>	<u>\$ 7,411,250</u>	10.6%	20	<u>\$ 5,738,641</u>
Combined Showerhead/TSV		N/A	Each						0.0%	-	\$ -
Heat Pump Water Heater			Each						0.0%	-	\$ -
Solar Water Heating		N/A	Home						0.0%	-	\$ -
Enclosure											
Air Sealing/Envelope [4]		X	Home	<u>27,979</u>			<u>13,625</u>	<u>\$ 4,850,032</u>	7.0%	11	<u>\$ 250,288</u>
Attic Insulation		N/A	Home	<u>3,116</u>			<u>91,568</u>	<u>\$ 7,432,817</u>	10.7%	20	<u>\$ 3,058,381</u>
Minor Home Repairs		X	Home	<u>27,078</u>			-	<u>\$ 2,914,049</u>	4.2%		\$ -
Diagnostic Air Sealing		N/A	Home						0.0%		\$ -
Floor Insulation			Home						0.0%	-	\$ -
HVAC [7]											
Duct Testing and Sealing		X	Home	<u>688</u>			<u>7,644</u>	<u>\$ 476,560</u>	0.7%	3	<u>\$ 38,295</u>
Furnace Repair/Replacement [8] (9)		N/A	Home						0.0%	20	\$ -
Prescriptive Duct Sealing		N/A	Home	<u>16,603</u>			<u>184,459</u>	<u>\$ 2,386,583</u>	3.4%	3	<u>\$ 924,141</u>
Smart Thermostat		N/A	Home	<u>9,761</u>			<u>50,963</u>	<u>\$ 2,601,318</u>	3.7%	9	<u>\$ 765,974</u>
High Efficiency Forced Air Unit (HE FAU) - Early Replacement		N/A	Home						0.0%	20	\$ -
High Efficiency Forced Air Unit (HE FAU) - On Burnout		X	Home	<u>1,311</u>			<u>21,041</u>	<u>\$ 5,486,427</u>	7.9%	20	<u>\$ 702,785</u>
Smart Fan Controller		N/A	Home	<u>10,999</u>			<u>301,140</u>	<u>\$ 1,802,880</u>	2.6%	6.7	<u>\$ 3,369,454</u>
Room A/C Replacement		X	Home						0.0%		\$ -
Central A/C Replacement		X	Home						0.0%		\$ -
Heat Pump Replacement		X	Home						0.0%		\$ -
Evaporative Cooler		X	Home						0.0%		\$ -
Energy Efficient Fan Control		N/A	Each						0.0%		\$ -
Portable A/C (9)		N/A	Home						0.0%		\$ -
Central Heat Pump-FS (propane or gas space)		N/A	Home						0.0%		\$ -
Wholehouse Fan		X	Home						0.0%		\$ -
Maintenance											
Furnace Clean and Tune [8]		X	Home						0.0%	20	\$ -
Central A/C Tune up		N/A	Home						0.0%	-	\$ -
Evaporative Cooling Maintenance		N/A	Home						0.0%	-	\$ -
Range Hood		X	Home						0.0%	-	\$ -
Lighting											
Exterior Hard wired LED fixtures		N/A	Each						0.0%	-	\$ -
LED Reflector Bulbs		N/A	Each						0.0%	-	\$ -
LED A-Lamps		N/A	Each						0.0%	-	\$ -
Miscellaneous											
CO and Smoke Alarm		N/A	Home	<u>31,667</u>			-	<u>\$ 8,067,393</u>	11.6%	-	\$ -
Comprehensive Home Health and Safety Check-up		N/A	Home	<u>30,621</u>			-	<u>\$ 1,830,720</u>	2.6%	-	\$ -
Pool Pumps		N/A	Each						0.0%	-	\$ -
Smart Strip Tier I		N/A	Home						0.0%	-	\$ -
Smart Strip Tier II		N/A	Each						0.0%	-	\$ -
Air Purifier (9)		X	Home						0.0%	-	\$ -
Cold Storage (9)		X	Home						0.0%	-	\$ -
Pilots											
Customer Enrollment											
Outreach & Assessment			Home	<u>55,818</u>				<u>\$ 8,391,292</u>	12.1%		
In-Home Energy Education			Home	<u>55,058</u>				<u>\$ 1,208,207</u>	1.7%		
Total Savings/Expenditures [5]				<u>363,210</u>			<u>1,162,289</u>	<u>\$ 69,616,400</u>			<u>\$ 20,165,923</u>
Total Households Weatherized [6]				<u>45,535</u>							

Households Treated			Total
- Single Family Households Treated		Home	<u>37,806</u>
- Mobile Homes Treated		Home	<u>7,729</u>
Total Number of Households Treated		Home	<u>45,535</u>
# Eligible Households to be Treated for PY		Home	69,837
% of Households Treated		%	<u>65%</u>
- Master-Meter Households Treated		Home	<u>3,987</u>

Actual Expenses			
ESA Program - Main	Electric	Gas	Total
Administration	\$ -	<u>\$ 9,032,202</u>	<u>\$ 9,032,202</u>
Direct Implementation (Non-Incentive)	\$ -	<u>\$ 1,653,055</u>	<u>\$ 1,653,055</u>
Direct Implementation	\$ -	<u>\$ 77,762,550</u>	<u>\$ 77,762,550</u>
TOTAL ESA Main COSTS	\$ -	<u>\$ 88,447,808</u>	<u>\$ 88,447,808</u>

<<Includes measures costs

Negative Therm Savings Measures				
YTD (actual)				
	Plus	Units	Quantity Installed	Therm Savings
Furnace Repair/Replacement	X	Home	<u>1,707</u>	<u>(12,733)</u>
Furnace Clean and Tune	X	Home	<u>6,598</u>	<u>(8,116)</u>

*D.21-06-015 permits IOUs to carry forward funds for committed work started in 2025 but finished in 2026. SoCalGas allowed its ESA Program contractors to complete and invoice such committed work by March 27, 2026 (the committed funds period). The amended results for main ESA Program include the committed funds period.

[1] As of September 2019, all savings are calculated based on the following source:

DNV-GL "Energy Savings Assistance (ESA) Program Impact Evaluation Program Years 2015-2017." April 26, 2019.

[2] Includes Faucet Aerators and Low Flow Showerheads.

[3] Includes Water Heater Blankets and Water Heater Pipe Insulation.

[4] Envelope and Air Sealing Measures may include outlet cover plate gaskets, attic access weatherization, weatherstripping - door, caulking and minor home repairs. Minor home repairs predominantly are door jamb repair / replacement, door repair, and window putty.

[5] Total Savings/Expenditures amount does not include credits, expenses, or required adjustments that are reflected in ESA Program Table 1.

[6] Weatherization may consist of attic insulation, attic access weatherization, weatherstripping - door, caulking, & minor home repairs

[7] Savings for HVAC measures vary by Climate Zone and are averaged.

[8] As approved at the 5/30/24 ESA WG meeting, future reporting for Furnace Repair/Replacement and Furnace Clean and Tune measures is suspended on this table beginning July 2024. Please see HCS Measures table above for year-to-date actuals.

[9] These measures meet the current definition of Health, Comfort, and Safety (HCS) measures, which are characterized by estimated energy savings of less than 1 therm or 1 kWh. Although currently designated as HCS measures, the majority of ESA measures also provide non-energy benefits (NEBs)—including HCS-related benefits—in addition to delivering energy savings.

PY 2025 Low Income Programs Annual Report
 ESA Program Table 2A
 Multifamily Whole Building Expenses and Energy Savings by Measure Installed
 SOUTHERN CALIFORNIA GAS COMPANY

Amended results noted in red font and underlined>

Table 2A-1 ESA Program - Multifamily Whole Building Measures [1]												
Measures [2][3]	Units of Measure (such as "each")	Measure Type (In-unit vs CAMWB) [8]	2025 Completed & Expensed Installation						Expenses (\$)	% of Expenditure	Effective Useful Life (Years)	2023 Total Measure Life Cycle Savings
			Quantity Installed	Number of Units for Cap-kBTU/h and Cap-Tons	kWh [4] (Annual)	kW [4] (Annual)	Therms [4] (Annual)	% of Expenditure				
Appliances												
High Efficiency Clothes Washer	Home	In-Unit	-	-	-	-	-	\$ -	0.0%	-	\$ -	
Domestic Hot Water												
Low Flow Showerhead	Home	CAMWB	-	-	-	-	-	\$ -	0.0%	-	\$ -	
Faucet Aerator	Home	CAMWB	-	-	-	-	-	\$ -	0.0%	-	\$ -	
Thermostatic Tub Spout/Diverter	Home	In-Unit	-	-	-	-	-	\$ -	0.0%	-	\$ -	
Thermostatic Shower Valve	Home	In-Unit	-	-	-	-	-	\$ -	0.0%	-	\$ -	
TSV and Low Flow Showerhead	Home	In-Unit	-	-	-	-	-	\$ -	0.0%	-	\$ -	
Water Heater Tank and Pipe Insulation	Lin. Ft.	In-Unit	-	-	-	-	-	\$ -	0.0%	-	\$ -	
Water Heater Tank and Pipe Insulation - CAM	Lin. Ft.	CAMWB	-	-	-	-	-	\$ -	0.0%	-	\$ -	
Water Heater Repair/Replacement - HC&S	Home	In-Unit	-	-	-	-	-	\$ -	0.0%	-	\$ -	
Demand Control DHW Recirculation Pump - CAM	Each	CAMWB	-	-	-	-	-	\$ -	0.0%	-	\$ -	
Water Heater Repair	Home	In-Unit	-	-	-	-	-	\$ -	0.0%	-	\$ -	
Water Heater Replace**	Cap-kBTU/h	In-Unit	-	-	-	-	-	\$ -	0.0%	-	\$ -	
Central Boiler Replace**	Cap-kBTU/h	CAMWB	-	-	-	-	-	\$ -	0.0%	-	\$ -	
Envelope												
Air Sealing/Envelope	Home	In-Unit	-	-	-	-	-	\$ -	0.0%	-	\$ -	
Attic Insulation	Home	In-Unit	-	-	-	-	-	\$ -	0.0%	-	\$ -	
HVAC [9]												
A/C Tune-up**	Cap-Tons	CAMWB	-	-	-	-	-	\$ -	0.0%	-	\$ -	
Furnace Replacement** (12)	Cap-kBTU/h	In-Unit	-	-	-	-	-	\$ -	0.0%	-	\$ -	
Heat Pump Split System**	Cap-Tons	CAMWB	-	-	-	-	-	\$ -	0.0%	-	\$ -	
Programmable Thermostat	Each	In-Unit	-	-	-	-	-	\$ -	0.0%	-	\$ -	
Furnace Repair/Replacement (12)	Each	In-Unit	-	-	-	-	-	\$ -	0.0%	-	\$ -	
Efficient Fan Controller	Each	CAMWB	-	-	-	-	-	\$ -	0.0%	-	\$ -	
Lighting												
Exterior LED Lighting	Fixture	CAMWB	-	-	-	-	-	\$ -	0.0%	-	\$ -	
Exterior LED Lighting - Pool	Lamp	CAMWB	-	-	-	-	-	\$ -	0.0%	-	\$ -	
Interior LED Exit Sign	Fixture	CAMWB	-	-	-	-	-	\$ -	0.0%	-	\$ -	
Interior LED Fixture	Fixture	CAMWB	-	-	-	-	-	\$ -	0.0%	-	\$ -	
Interior LED Lighting	KiloLumen	CAMWB	-	-	-	-	-	\$ -	0.0%	-	\$ -	
Interior LED Screw-in	Lamp	CAMWB	-	-	-	-	-	\$ -	0.0%	-	\$ -	
Interior TLED Type A Lamps	Lamp	CAMWB	-	-	-	-	-	\$ -	0.0%	-	\$ -	
Interior TLED Type C Lamps	Lamp	CAMWB	-	-	-	-	-	\$ -	0.0%	-	\$ -	
Miscellaneous												
Tier-2 Smart Power Strip	Each	In-Unit	-	-	-	-	-	\$ -	0.0%	-	\$ -	
Variable Speed Pool Pump	Each	CAMWB	-	-	-	-	-	\$ -	0.0%	-	\$ -	
Customer Enrollment - In Unit												
ESA Outreach & Assessment	Home	In-Unit	-	-	-	-	-	\$ -	0.0%	-	\$ -	
ESA In-Home Energy Education	Home	In-Unit	-	-	-	-	-	\$ -	0.0%	-	\$ -	
Assessment CAM	Home	CAMWB	-	-	-	-	-	\$ -	0.0%	-	\$ -	
Enrollment Whole Building	Home	CAMWB	-	-	-	-	-	\$ -	0.0%	-	\$ -	
Other												
Audit	Home	Property	-	-	-	-	-	\$ -	0.0%	-	\$ -	
Project Completion Fee	Home	Property	-	-	-	-	-	\$ -	0.0%	-	\$ -	
Taxes	Home	Property	-	-	-	-	-	\$ -	0.0%	-	\$ -	
Project Completion Fee - CAM	Home	Property	-	-	-	-	-	\$ -	0.0%	-	\$ -	
Ancillary Services												
Audit	Home	Property	-	-	-	-	-	\$ -	0.0%	-	\$ -	
Project Completion, Common Area - CAM	Home	Property	-	-	-	-	-	\$ -	0.0%	-	\$ -	
Project Completion, In Unit	Home	Property	-	-	-	-	-	\$ -	0.0%	-	\$ -	
Project Completion, Whole Building	Home	Property	-	-	-	-	-	\$ -	0.0%	-	\$ -	
Taxes	Home	Property	-	-	-	-	-	\$ -	0.0%	-	\$ -	
QA/Inspection, In Unit	Home	Property	-	-	-	-	-	\$ -	0.0%	-	\$ -	
Permit Fee	Home	Property	-	-	-	-	-	\$ -	0.0%	-	\$ -	
Total												
			-	-	-	-	-	\$ -	0.0%	-	\$ -	
Multifamily Properties Treated												
	Number											
Total Number of Multifamily Properties Treated [6]	-											
Subtotal of Master-metered Multifamily Properties Treated	-											
Total Number of Multifamily Tenant Units w/in Properties Treated [7]	-											
Total Number of Buildings w/in Properties Treated	-											
Multifamily Households Treated (In-Unit)												
	Number											
Total Number of Households Individually Treated	-											
ESA Program - MFWB												
		Actual Expenses										
		Electric	Gas	Total								
Administration	\$	-	\$	\$ -								
Direct Implementation (Non-Incentive)	\$	-	\$	\$ -								
Direct Implementation	\$	-	\$	\$ -								
SPOC [10]	\$	-	\$	\$ -								
TOTAL MFWB COSTS [11]	\$	-	\$	\$ -								

Note: The MFWB program is implemented by Richard Heath & Associates and SDG&E provides oversight to the detailed process.

- [1] Applicable to Deed-Restricted, government and non-profit owned multi-family buildings described in D.16-11-022 where 65% of tenants are income eligible based on CPUC income requirements of at or below 200% of the Federal Poverty Guidelines.
- [2] Measures are customized by each IOU. Measures list may change based on available information on both costs and benefits and may vary across climate zones.
- [3] Commissioning costs, as allowable per the Decision, are included in measures total cost unless otherwise noted.
- [4] All savings are calculated based on the following sources:
 - DNV-GL "Energy Savings Assistance (ESA) Program Impact Evaluation Program Years 2015-2017." April 26, 2019.
 - [5] Audit costs may be covered by other programs or projects may utilize previous audits. Not all participants will have an audit cost associated with their project.
 - [6] Multifamily properties are sites with at least five (5) or more dwelling units. The properties may have multiple buildings.
 - [7] Multifamily tenant units are the number of dwelling units located within properties treated. This number does not represent the same number of dwellings treated as captured in table 2A.
 - [8] Measure type column added to identify if a measure is for in-unit or common area/whole building because they use different paperwork savings.
 - [9] Savings for HVAC measures vary by Climate Zone and are averaged.
 - [10] Costs related to MFWB but not accounted for in ESA budget
 - [11] Includes only ESA MFWB costs verified in SAP.
 - [12] These measures meet the current definition of Health, Comfort, and Safety (HCS) measures, which are characterized by estimated energy savings of less than 1 therm or 1 kWh. Although currently designated as HCS measures, the majority of ESA measures also provide non-energy benefits (NEBs)—including HCS-related benefits—in addition to delivering energy savings.

Table 2A-2 ESA Program - Multifamily Whole Building Measures SoCalGas [1]												
Measures [2][3]	Units of Measure (such as "each")	Measure Type (In-unit vs CAMWB) [8]	2025 Completed & Expensed Installation						Expenses (\$)	% of Expenditure	Effective Useful Life (Years)	2023 Total Measure Life Cycle Savings
			Quantity Installed	Number of Units for Cap-kBTU/h and Cap-Tons	kWh [4] (Annual)	kW [4] (Annual)	Therms [4] (Annual)	% of Expenditure				
Appliances												
High Efficiency Clothes Washer	Home	CAMWB	20		5,274		1	420	\$ 30,200.00	0.2%	11	\$ 7,660.20
Domestic Hot Water												
Low Flow Showerhead	Home	In-Unit	7,227		74,438			59,895	\$ 243,622.17	1.8%	10	\$ 994,265.13
Faucet Aerator	Home	In-Unit	15,159		81,351			65,282	\$ 168,568.08	1.3%	10	\$ 1,083,686.01
Thermostatic Tub Spout/Diverter	Each	CAMWB	4		28			23	\$ 44.76	0.0%	10	\$ 378.48
Thermostatic Shower Valve	Home	In-Unit	3,360		25,368			20,067	\$ 424,972.80	3.2%	10	\$ 333,104.40
TSV and Low Flow Showerhead	Home	In-Unit	2,298		7,652			6,139	\$ 105,708.00	0.8%	10	\$ 101,904.91
Water Heater Tank and Pipe Insulation	Home	In-Unit	485		6,063			4,887	\$ 25,394.60	0.2%	10	\$ 81,130.18
Water Heater Tank and Pipe Insulation - CAM	Lin. Ft.	CAMWB	259					1,145	\$ 6,936.02	0.1%	9	\$ 5,974.23
Water Heater Repair/Replacement - HC&S	Home	In-Unit	925					8,871	\$ 24,211.40	0.2%	9	\$ 161,976.43
Demand Control DHW Recirculation Pump - CAM	Each	In-Unit	28						\$ 56,367.40	0.4%	11	
Water Heater Repair/Replacement - HC&S	Each	In-Unit	5						\$ 10,172.75	0.1%	11	
Demand Control DHW Recirculation Pump - CAM	Household	CAMWB								0.0%		
Water Heater Repair	Home	In-Unit								0.0%		
Water Heater Replace**	Cap-kBTU/h	In-Unit								0.0%		
Central Boiler Replace**	Cap-kBTU/h	CAMWB								0.0%		
New: Non-Condensing Domestic Hot Water Boiler - CAM	Cap-kBTU/h	CAMWB								0.0%		
New: Condensing Domestic Hot Water Boiler - CAM	Cap-kBTU/h	CAMWB	11,392		(3)	(10)		19,149	\$ 477,707.45	3.6%	20	\$ 635,747.44
Central Domestic Hot Water Boiler - CAM	Cap-kBTU/h	CAMWB	39,302					215,839	\$ 3,447,373.05	26.0%	20	\$ 6,596,651.87
Storage Water Heater - CAM	Each	CAMWB	6					179	\$ 35,646.40	0.1%	15	\$ 3,268.54
Tankless Water Heater - CAM	Each	CAMWB	56		(503)	(0)		3,559	\$ 699,835.83	5.3%	15	\$ 131,442.12
Instantaneous Domestic Hot Water Heater - CAM	Cap-kBTU/h	CAMWB	5		(1)			23	\$ 151,002.00	1.1%	20	\$ 768.58
Envelope												
Attic Insulation	Area-R2	In-Unit	1,000					18	\$ 1,668.00	0.0%	20	\$ 901.38
Attic Insulation - CAM	Area-R2	CAMWB	171,222		31,891	31	1,704	\$ 359,097.58	2.7%	20	\$ 84,860.70	
Wall Insulation Blow-in	Area-R2	In-Unit								0.0%		
Wall Insulation Blow-in - CAM	Area-R2	CAMWB	13,000		7,020		\$ 1,404	\$ 15,600.00	0.1%	30	\$ 69,919.20	
Windows	Each	In-Unit								0.0%		
Window Film	Each	In-Unit								0.0%		
Air Sealing	Each	In-Unit	2,225						\$ 42,643.85	0.3%	15	
Repair Ceiling/Floor/Wall (Interior/Exterior)	Area-R2	In-Unit	218						\$ 5,173.35	0.0%		
Wall Furnace Replacement - HC&S	In-Unit	In-Unit	15						\$ 40,225.50	0.3%	3	
HVAC [9]												
Air Conditioners Split System	Cap-Tons	In-Unit								0.0%		
Air Conditioners Split System - CAM	Cap-Tons	CAMWB								0.0%		
Heat Pump Split System	Cap-Tons	In-Unit								0.0%		
New: Packaged Air Conditioner	In-Unit	In-Unit								0.0%		
New: Packaged Air Conditioner - CAM	Cap-Tons	CAMWB	4		1,328	0	10	\$ 11,280.00	0.1%	15	\$ 239.04	
Package Terminal A/C	In-Unit	In-Unit								0.0%		
Package Terminal Heat Pump	Cap-kBTU/h	In-Unit								0.0%		
Furnace Replacement	Cap-kBTU/h	In-Unit								0.0%		
Furnace Replacement - HC&S	Each	In-Unit	3						\$ 15,335.91	0.1%	20	
Space Heating Boiler	In-Unit	In-Unit								0.0%		
Smart Thermostats	Each	In-Unit	1,132		149,519			5,515	\$ 157,402.35	1.2%	9	\$ 83,311.86
Smart Thermostats - CAM	Each	CAMWB	17		2,162			77	\$ 3,945.22	0.0%	9	\$ 1,159.84
Furnace Repair/Replacement	Each	In-Unit	616					33	\$ 55,082.72	0.4%	20	\$ 1,096.93
Central A/C Replacement	In-Unit	In-Unit								0.0%		
High Efficiency Forced Air Unit (HE FAU)	In-Unit	In-Unit								0.0%		
Portable A/C	Each	In-Unit								0.0%		
Central A/C Tune up	In-Unit	In-Unit								0.0%		
Blower Motor Retrofit	SurfArea-R2	In-Unit								0.0%		
Efficient Fan Controller	Area-R2-BA	In-Unit	335,389		157,467	131	1,938	\$ 45,013.83	0.3%	5	\$ 21,556.14	
Duct Test and Seal - CAM	Area-R2-BA	CAMWB								0.0%		
Maintenance												
Evaporative Cooler	Each	In-Unit								0.0%		
Combustion Ventilation Air (CVA) Repair	Each	In-Unit	126						\$ 5,222.70	0.0%		
Combustion Ventilation Air (CVA) Repair - CAM	Each	CAMWB								0.0%		
<												

PY 2025 Low Income Programs Program Annual Report
ESA Program Table 2B
Expenses and Energy Savings by Measure Installed - Pilot Plus and Pilot Deep
SOUTHERN CALIFORNIA GAS COMPANY

Measures	Units	ESA Program - Pilot Plus ^[1]							Effective Useful Life (years)	2024 Total Measure Life Cycle Bill Savings
		2025 Completed & Expensed Installation								
		Quantity Installed	kWh (Annual) ^[2]	kW (Annual) ^[2]	Therms (Annual) ^[2]	Expenses (\$)	% of Expenditure			
Appliances										
Energy Star Chest Freezer: 14-18 cf	Each	-	0.00	0.00	0.00	\$ -	0%			
Energy Star Chest Freezer: 20-22 cf	Each	-	0.00	0.00	0.00	\$ -	0%			
Energy Star Chest Freezer: 5-9 cf	Each	-	0.00	0.00	0.00	\$ -	0%			
Energy Star Qualified Clothes Washer	Each	-	0.00	0.00	0.00	\$ -	0%			
HP Washer/Dryer Combo Unit	Each	-	0.00	0.00	0.00	\$ -	0%			
Energy Star Qualified Dishwashers	Each	2	44.60	0.01	1.24	\$ 2,060.00	2%	11	\$	
Energy Star Qualified Refrigerators - Large 20+ cf	Each	3	142.20	0.00	-1.98	\$ 4,305.00	4%	14	\$244.15	
Energy Star Qualified Refrigerators - Medium 17 - 19 cf	Each	-	0.00	0.00	0.00	\$ -	0%			
Energy Star Qualified Refrigerators - Small 14-16 cf	Each	-	0.00	0.00	0.00	\$ -	0%			
Energy Star Upright Freezer: 13.5-15 cf	Each	-	0.00	0.00	0.00	\$ -	0%			
Energy Star Upright Freezer: 16-18 cf	Each	-	0.00	0.00	0.00	\$ -	0%			
Energy Star Upright Freezer: 20-22 cf	Each	-	0.00	0.00	0.00	\$ -	0%			
Cooling Measures										
Energy Star Qualified Ceiling Fans	Each	1	60.26	0.01	-1.22	\$ 300.00	0%		\$	
Whole House Fan	Each	-	0.00	0.00	0.00	\$ -	0%			
Evaporative cooler installation 3,000 CFM	Each	-	0.00	0.00	0.00	\$ -	0%			
Evaporative cooler installation 4,000 CFM	Each	-	0.00	0.00	0.00	\$ -	0%			
Evaporative cooler installation 5,000 CFM	Each	-	0.00	0.00	0.00	\$ -	0%			
Replace Room AC with Energy Star Qualified RAC - 10k BTU	Each	-	0.00	0.00	0.00	\$ -	0%			
Replace Room AC with Energy Star Qualified RAC - 12k BTU	Each	-	0.00	0.00	0.00	\$ -	0%			
Replace Room AC with Energy Star Qualified RAC - 15k BTU	Each	-	0.00	0.00	0.00	\$ -	0%			
Replace Room AC with Energy Star Qualified RAC - 6-8k BTU	Each	-	0.00	0.00	0.00	\$ -	0%			
Domestic Hot Water										
Faucet Aerator	Each	41	292.08	0.16	165.66	\$ 385.30	0%	7	\$	
Low-Flow Showerhead - Handheld	Each	38	1572.80	0.44	257.15	\$ 1,613.60	1%	10	\$	
Low-Flow Showerhead - Regular	Each	-	0.00	0.00	0.00	\$ -	0%			
Energy Star HE Gas Storage Water Heater - 40G	Each	-	0.00	0.00	0.00	\$ -	0%			
Energy Star HE Gas Storage Water Heater - 50G	Each	-	0.00	0.00	0.00	\$ -	0%			
Replace existing electric W/H with HP Water Heater - 40G	Each	-	0.00	0.00	0.00	\$ -	0%			
Replace existing electric W/H with HP Water Heater - 50G	Each	-	0.00	0.00	0.00	\$ -	0%			
Replace existing electric W/H with HP Water Heater - 80G	Each	-	0.00	0.00	0.00	\$ -	0%			
Replace with Solar Water Heating w/storage back up	Each	-	0.00	0.00	0.00	\$ -	0%			
Replace with Solar Water Heating w/tankless back up	Each	-	0.00	0.00	0.00	\$ -	0%			
Replace with Tankless Water Heater	Each	-	0.00	0.00	0.00	\$ -	0%			
Thermostatic Shower Valve	Each	38	905.00	0.48	299.45	\$ 2,145.00	2%	10	\$121.00	
Thermostatic Tub Spout/Diverter	Each	-	0.00	0.00	0.00	\$ -	0%			
Water Heater - Repair water leak - NTE \$300	T&M	-	0.00	0.00	0.00	\$ -	0%			
Water Heater Blanket	Each	-	0.00	0.00	0.00	\$ -	0%			
Water Heater Pipe Insulation	Each	13	0.00	0.00	25.16	\$ 369.00	0%		\$	
Enclosure										
Attic Cover Replacement	Each	-	0.00	0.00	0.00	\$ -	0%			
Attic Insulation, Add R-11	Home	2	0.00	0.00	0.00	\$ -	0%			
Attic Insulation, Add R-19	Home	-	74.08	0.00	133.18	\$ 12,507.75	12%	20	\$32.00	
Attic Insulation, Add R-30	Home	-	163.85	0.23	37.90	\$ 4,038.77	1%	20	\$224.00	
Attic Insulation, Add R-38	Home	-	0.00	0.00	0.00	\$ -	0%			
Attic Insulation, Add R-49	Home	-	0.00	0.00	0.00	\$ -	0%			
Caulking	Per Linear Foot	-	0.00	0.00	0.00	\$ -	0%			
Cover Plate Gaskets	Per Home	-	0.00	0.00	0.00	\$ -	0%			
Duct Sealing - 120 Minutes	Per System	18	1877.88	1.01	47.84	\$ 6,840.00	6%	18	\$557.00	
Duct Sealing - 60 Minutes	Per System	-	0.00	0.00	0.00	\$ -	0%			
Duct Sealing - 90 Minutes	Per System	-	0.00	0.00	0.00	\$ -	0%			
Floor Insulation, Add R-19	Per Square Foot	-	0.00	0.00	0.00	\$ -	0%			
Glass Replacement	Per Square Foot	-	0.00	0.00	0.00	\$ -	0%			
High Efficiency Windows	Home	-	0.00	0.00	0.00	\$ -	0%			
High-Performance Cool Roofs	Per Square Foot	-	0.00	0.00	0.00	\$ -	0%			
Insulated Exterior Doors	Per Door	-	0.00	0.00	0.00	\$ -	0%			
Kitchen Exhaust Dampers	Each	-	0.00	0.00	0.00	\$ -	0%			
Minor Home / Envelop Repairs - NTE \$600	T&M	-	0.00	0.00	0.00	\$ -	0%			
Prescriptive Duct Sealing (No HVAC Replacement)	Per System	-	0.00	0.00	0.00	\$ -	0%			
Radiant Barriers	Per Square Foot	-	0.00	0.00	0.00	\$ -	0%			
Room AC/Evaporative Cooler Cover	Each	-	0.00	0.00	0.00	\$ -	0%			
Wall Insulation, Add R-13	Per Square Foot	-	0.00	0.00	0.00	\$ -	0%			
Weather-stripping	Home	18	0.00	0.00	0.10	\$ 3,312.25	3%	15	\$63.44	
Window Film (Tint)	Per Square Foot	-	0.00	0.00	0.00	\$ -	0%			
HVAC ^[3]										
Duct Insulation (R-6)	Per Linear Foot	-	0.00	0.00	0.00	\$ -	0%			
Duct Repair	Each	1	0.00	0.00	0.00	\$ 31.50	0%		\$	
Duct Replacement	Home	1	0.00	0.00	0.00	\$ 315.00	0%		\$	
Duct Test - Title 24 or to perform duct sealing	Per System	18	0.00	0.00	0.00	\$ 2,550.00	2%		\$	
ECM Blower Motor	Each	-	0.00	0.00	0.00	\$ -	0%			
Efficient Fan Controller	Each	17	5040.48	5.29	0.00	\$ 4,675.00	4%	15	\$	
HE Wall Furnace 82% AFUE	Each	-	0.00	0.00	0.00	\$ -	0%			
HVAC System - Filter Replacement (No HVAC Replacement)	Each	19	155.23	0.07	0.00	\$ 1,235.00	1%	1	\$	
HVAC Tune-up	Each	17	838.57	0.29	-0.06	\$ 7,330.00	6%	3	\$	
Mobile Home Split System, 2 TON 16 SEER/60 KBTU 95% AFUE	Each	-	0.00	0.00	0.00	\$ -	0%			
Mobile Home Split System, 2 TON 16 SEER/75 KBTU 95% AFUE	Each	-	0.00	0.00	0.00	\$ -	0%			

Measures	Units	ESA Program - Pilot Deep ^[1]							Effective Useful Life (years)	2024 Total Measure Life Cycle Bill Savings
		2025 Completed & Expensed Installation								
		Quantity Installed	kWh (Annual) ^[2]	kW (Annual) ^[2]	Therms (Annual) ^[2]	Expenses (\$)	% of Expenditure			
Appliances										
Energy Star Chest Freezer: 14-18 cf	Each	2	697.77	-	(3.12)	\$ 2,390.00	0%	11	\$205.00	
Energy Star Chest Freezer: 20-22 cf	Each	-	-	-	-	\$ -	0%			
Energy Star Chest Freezer: 5-9 cf	Each	-	-	-	-	\$ -	0%			
Energy Star Qualified Clothes Washer	Each	2	-	-	20.63	\$ 2,290.00	0%	11	\$43.20	
HP Washer/Dryer Combo Unit	Each	-	-	-	-	\$ -	0%			
Energy Star Qualified Dishwashers	Each	-	-	-	-	\$ -	0%			
Energy Star Qualified Refrigerators - Large 20+ cf	Each	25	10,864.77	-	(69.33)	\$ 35,875.00	2%	14	\$3,428.50	
Energy Star Qualified Refrigerators - Medium 17 - 19 cf	Each	-	-	-	-	\$ -	0%			
Energy Star Qualified Refrigerators - Small 14-16 cf	Each	1	547.78	-	(1.38)	\$ 1,000.00	0%	14	\$177.00	
Energy Star Upright Freezer: 13.5-15 cf	Each	1	-	-	-	\$ 925.00	0%	11	\$177.00	
Energy Star Upright Freezer: 16-18 cf	Each	-	-	-	-	\$ -	0%			
Energy Star Upright Freezer: 20-22 cf	Each	-	-	-	-	\$ -	0%			
Cooling Measures										
Energy Star Qualified Ceiling Fans	Each	3	(47.30)	-	0.53	\$ 900.00	0%		\$	
Whole House Fan	Each	67	16,685.00	8.24	(41.49)	\$ 208,356.46	10%	20	\$	
Evaporative cooler installation 3,000 CFM	Each	1	17,943.24	-	-	\$ 1,415.00	0%	5	\$4,794.00	
Evaporative cooler installation 4,000 CFM	Each	2	722.36	-	-	\$ 3,025.00	0%	5		
Evaporative cooler installation 5,000 CFM	Each	2	912.70	-	-	\$ 3,680.00	0%	5		
Replace Room AC with Energy Star Qualified RAC - 10k BTU	Each	-	-	-	-	\$ -	0%			
Replace Room AC with Energy Star Qualified RAC - 12k BTU	Each	-	-	-	-	\$ -	0%			
Replace Room AC with Energy Star Qualified RAC - 15k BTU	Each	-	-	-	-	\$ -	0%			
Replace Room AC with Energy Star Qualified RAC - 6-8k BTU	Each	2	483.72	-	-	\$ 1,700.00	0%	9		
Domestic Hot Water										
Faucet Aerator	Each	224	1,032.70	0.05	668.96	\$ 2,239.00	0%	7	\$	
Low-Flow Showerhead - Handheld	Each	206	3,616.00	0.38	1,324.28	\$ 8,989.00	0%	10	\$	
Low-Flow Showerhead - Regular	Each	6	47.30	-	38.15	\$ 240.00	0%	10	\$	
Energy Star HE Gas Storage Water Heater - 40G	Each	-	-	-	-	\$ -	0%			
Energy Star HE Gas Storage Water Heater - 50G	Each	-	-	-	-	\$ -	0%			
Replace existing electric W/H with HP Water Heater - 40G	Each	1	-	-	30.93	\$ 2,540.00	0%	10	\$43.00	
Replace existing electric W/H with HP Water Heater - 50G	Each	1	-	-	34.17	\$ 3,163.78	0%	10	\$57.00	
Replace existing electric W/H with HP Water Heater - 80G	Each	-	-	-	-	\$ -	0%			
Replace with Solar Water Heating w/storage back up	Each	-	-	-	-	\$ -	0%			
Replace with Solar Water Heating w/tankless back up	Each	-	-	-	-	\$ -	0%			
Replace with Tankless Water Heater	Each	23	-	-	1,875.18	\$ 113,410.00	5%	20	\$3,052.28	
Thermostatic Shower Valve	Each	198	2,515.00	0.19	1,282.03	\$ 11,644.00	1%	10	\$49.07	
Thermostatic Tub Spout/Diverter	Each	2	28.00	-	2.60	\$ 110.00	0%	10	\$	
Water Heater - Repair water leak - NTE \$300	T&M	-	-	-	-	\$ -	0%			
Water Heater Blanket	Each	-	-	-	-	\$ -	0%			
Water Heater Pipe Insulation	Each	38	-	-	(16.88)	\$ 1,086.00	0%		\$	
Enclosure										
Attic Cover Replacement	Each	-	-	-	-	\$ -	0%			
Attic Insulation, Add R-11	Home	9	1,533.24	-	66.56	\$ 22,550.00	2%	20	\$1,446.09	
Attic Insulation, Add R-19	Home	27	7,151.51	-	409.99	\$ 78,165.70	4%	20	\$5,150.85	
Attic Insulation, Add R-30	Home	17	11,015.90	-	493.87	\$ 46,582.97	3%	20	\$2,848.34	
Attic Insulation, Add R-38	Home	9	7,948.59	-	710.28	\$ 27,021.60	2%	20	\$1,649.60	
Attic Insulation, Add R-49	Home	3	24.10	-	97.91	\$ 3,102.00	0%	20	\$173.53	
Caulking	Per Linear Foot	-	-	-	-	\$ -	0%			
Cover Plate Gaskets	Per Home	-	-	-	-	\$ -	0%			
Duct Sealing - 120 Minutes	Per System	95	26,304.94	-	260.70	\$ 35,280.00	2%	18	\$8,848.62	
Duct Sealing - 60 Minutes	Per System	-	-	-	-	\$ -	0%			
Duct Sealing - 90 Minutes	Per System	-	-	-	-	\$ -	0%			
Floor Insulation, Add R-19	Per Square Foot	-	-	-	-	\$ -	0%			
Glass Replacement	Per Square Foot	-	-	-	-	\$ -	0%			
High Efficiency Windows	Home	27	22,075.00	-	195.65	\$ 213,183.72	17%	10	\$7,145.82	
High-Performance Cool Roofs	Per Square Foot	-	-	-	-	\$ -	0%			
Insulated										

**PY 2025 Low Income Programs Annual Report
 ESA Program Table 2C
 Expenses and Energy Savings by Measure Installed - CSD Leveraging
 SOUTHERN CALIFORNIA GAS COMPANY**

	ESA Program - CSD Leveraging								
	2025 Completed & Expensed Installation								
	Units	Quantity Installed	kWh[1] (Annual)	kW[1] (Annual)	Therms[1] (Annual)	Expenses (\$)	% of Expenditure	Effective Useful Life (Years)	2024 Total Measure Life Cycle Bill Savings
Measures									
Appliances									
High Efficiency Clothes Washer	Home	-	-	-	-	\$ -	0.0%	-	\$ -
Refrigerators	Each	-	-	-	-	\$ -	0.0%	-	\$ -
Freezers	Each	-	-	-	-	\$ -	0.0%	-	\$ -
Clothes Dryer	Each	-	-	-	-	\$ -	0.0%	-	\$ -
Dishwasher	Each	-	-	-	-	\$ -	0.0%	-	\$ -
Domestic Hot Water									
Other Domestic Hot Water [2]	Home	-	-	-	-	\$ -	0.0%	-	\$ -
Water Heater Tank and Pipe Insulation [3]	Home	-	-	-	-	\$ -	0.0%	-	\$ -
Water Heater Repair/Replacement	Home	-	-	-	-	\$ -	0.0%	-	\$ -
Thermostatic Shower Valve	Each	-	-	-	-	\$ -	0.0%	-	\$ -
Tankless Water Heater - NEW	Home	-	-	-	-	\$ -	0.0%	-	\$ -
Combined Showerhead/TSV	Each	-	-	-	-	\$ -	0.0%	-	\$ -
Heat Pump Water Heater	Each	-	-	-	-	\$ -	0.0%	-	\$ -
Tub Diverter/ Tub Spout	Each	-	-	-	-	\$ -	0.0%	-	\$ -
Solar Water Heating	Home	-	-	-	-	\$ -	0.0%	-	\$ -
Enclosure									
Air Sealing/Envelope [4]	Home	-	-	-	-	\$ -	0.0%	-	\$ -
Diagnostic Air Sealing	Home	-	-	-	-	\$ -	0.0%	-	\$ -
Attic Insulation	Home	-	-	-	-	\$ -	0.0%	-	\$ -
Floor Insulation	Home	-	-	-	-	\$ -	0.0%	-	\$ -
Minor Home Repairs	Home	-	-	-	-	\$ -	0.0%	-	\$ -
HVAC [6]									
Furnace Repair/Replacement	Home	-	-	-	-	\$ -	0.0%	-	\$ -
Room A/C Replacement	Home	-	-	-	-	\$ -	0.0%	-	\$ -
Central A/C Replacement	Home	-	-	-	-	\$ -	0.0%	-	\$ -
Heat Pump Replacement	Home	-	-	-	-	\$ -	0.0%	-	\$ -
Evaporative Cooler	Home	-	-	-	-	\$ -	0.0%	-	\$ -
Duct Testing and Sealing	Home	-	-	-	-	\$ -	0.0%	-	\$ -
Energy Efficient Fan Control	Home	-	-	-	-	\$ -	0.0%	-	\$ -
Prescriptive Duct Sealing	Home	-	-	-	-	\$ -	0.0%	-	\$ -
High Efficiency Forced Air Unit (HE FAU) - Early Replacement	Home	-	-	-	-	\$ -	0.0%	-	\$ -
High Efficiency Forced Air Unit (HE FAU) - On Burnout	Home	-	-	-	-	\$ -	0.0%	-	\$ -
Smart Thermostat	Each	-	-	-	-	\$ -	0.0%	-	\$ -
Portable A/C	Each	-	-	-	-	\$ -	0.0%	-	\$ -
Central Heat Pump-FS (propane or gas space)	Home	-	-	-	-	\$ -	0.0%	-	\$ -
Wholehouse Fan	Home	-	-	-	-	\$ -	0.0%	-	\$ -
Smart Fan Controller - NEW	Home	-	-	-	-	\$ -	0.0%	-	\$ -
Maintenance									
Furnace Clean and Tune	Home	-	-	-	-	\$ -	0.0%	-	\$ -
Central A/C Tune up	Home	-	-	-	-	\$ -	0.0%	-	\$ -
Evaporative Cooling Maintenance	Home	-	-	-	-	\$ -	0.0%	-	\$ -
Range Hood	Home	-	-	-	-	\$ -	0.0%	-	\$ -
Lighting									
Exterior Hard wired LED fixtures	Each	-	-	-	-	\$ -	0.0%	-	\$ -
LED Reflector Bulbs	Each	-	-	-	-	\$ -	0.0%	-	\$ -
LED A-Lamps	Each	-	-	-	-	\$ -	0.0%	-	\$ -
Miscellaneous									
Pool Pumps	Home	-	-	-	-	\$ -	0.0%	-	\$ -
Smart Strip Tier I	Home	-	-	-	-	\$ -	0.0%	-	\$ -
Smart Strip Tier II	Each	-	-	-	-	\$ -	0.0%	-	\$ -
Air Purifier	Home	-	-	-	-	\$ -	0.0%	-	\$ -
Cold Storage	Each	-	-	-	-	\$ -	0.0%	-	\$ -
Comprehensive Home Health and Safety Check-up	Home	-	-	-	-	\$ -	0.0%	-	\$ -
CO and Smoke Alarm	Home	-	-	-	-	\$ -	0.0%	-	\$ -
Pilots									
Customer Enrollment									
Outreach & Assessment	Home	-	-	-	-	\$ -	0.0%	-	\$ -
In-Home Education	Home	-	-	-	-	\$ -	0.0%	-	\$ -
Total Savings/Expenditures									
			-	-	-	\$ -	0.0%		
Total Households Weatherized [5]									
CSD MF Tenant Units Treated									
			Total						
									-

ESA Program - CSD Leveraging	Actual Expenses		
	Electric	Gas	Total
Administration	\$ -	\$ -	\$ -
Direct Implementation (Non-Incentive)	\$ -	\$ -	\$ -
Direct Implementation	\$ -	\$ -	\$ -
TOTAL CSD Leveraging COSTS	\$ -	\$ -	\$ -

<<Includes measures costs

Note: No activity in 2025.
 [1] All savings are calculated based on the following sources:
 DNV-GL "Energy Savings Assistance (ESA) Program Impact Evaluation Program Years 2015-2017." April 26, 2019.
 [2] Includes Faucet Aerators and Low Flow Showerheads.
 [3] Includes Water Heater Blankets and Water Heater Pipe Insulation.
 [4] Envelope and Air Sealing Measures may include outlet cover plate gaskets, attic access weatherization, weatherstripping - door, caulking and minor home repairs. Minor home repairs predominantly are door jamb repair / replacement, door repair, and window putty.
 [5] Weatherization may consist of attic insulation, attic access weatherization, weatherstripping - door, caulking, & minor home repairs.
 [6] Savings for HVAC measures vary by Climate Zone and are averaged.

	A	B	C	D	E	F	G	H	I	J	K
1	PY 2025 Low Income Programs Annual Report ESA Program Table 3 Program Cost Effectiveness SOUTHERN CALIFORNIA GAS COMPANY										
2											
3	<u>Amended results noted in red font and underlined</u>										
4	Program	Ratio of Benefits Over Costs							Net Benefits \$M		
5		ESACET [1]	Resource Test [2]	TRC	PAC	RIM	SCT Base	SCT High	ESACET	Resource Test	TRC
6	ESA In-Unit (SF, MH)	<u>0.69</u>	<u>0.42</u>	<u>0.21</u>	<u>0.21</u>	<u>0.17</u>	<u>0.31</u>	<u>0.32</u>	<u>(\$26.59)</u>	<u>(\$26.08)</u>	<u>(\$67.42)</u>
7	ESA MFWB [3] (In-Unit, CAM)	<u>1.05</u>	<u>1.56</u>	<u>0.65</u>	<u>0.65</u>	<u>0.39</u>	<u>1.01</u>	<u>1.03</u>	<u>\$0.79</u>	<u>\$3.46</u>	<u>(\$5.10)</u>
8	ESA Pilot Plus and Pilot Deep [4]	0.23	0.45	0.19	0.19	0.14	0.26	0.27	(\$3.17)	(\$0.96)	(\$3.35)
9	Building Electrification (N/A for SoCalGas)	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
10	Clean Energy Homes (N/A for SoCalGas)	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
11											
12	Notes:										
13	Ordering Paragraph 43 of D.14-08-030 directs the application of the two new cost effectiveness tests, ESACET and Resource TRC (renamed the Resource Test).										
14	All program measures, including resource and non-resource measures, are represented in the ESACET. Only measures considered resource measures are represented in the Resource Test. Resource measures, as defined in D.21-06-015, include any measure with a unit savings of less than one kWh or one therm.										
15	Energy Division instructed the IOUs to use the results of the PY2015 to 2017 ESA Impact Evaluation for their 2019 and 2020 savings estimates.										
16											
17	[1] The ESACET includes energy and non-energy benefits and all program costs including measure, installation, and administrative costs.										
18	[2] The Resource Test includes energy benefits and program measure and installation costs.										
19	[3] The MFWB program is implemented by Richard Heath & Associates and SDG&E provides oversight to the detailed process.										
20	[4] For PP/PD, the ESACET value was calculated by using both Therm and kWh costs to ensure sure both SCE and SCG have uniform and consistent ESACET.										

PY 2025* Low Income Programs Annual Report
ESA Program Table 4
Detail by Housing Type and Source ¹
SOUTHERN CALIFORNIA GAS COMPANY

Amended results noted in red font and underlined

Customer	Housing Type	2025 Energy Savings ²			2024 Expenses
		# Homes Treated	(mWh)	(MW)	
Gas and Electric Customers					
Owners - Total		-	-	-	-
	Single Family				
	Multi Family				
	Mobile Homes				
Renters - Total		-	-	-	-
	Single Family				
	Multi Family				
	Mobile Homes				
Electric Customers (only)					
Owners - Total		-	-	-	-
	Single Family				
	Multi Family				
	Mobile Homes				
Renters - Total		-	-	-	-
	Single Family				
	Multi Family				
	Mobile Homes				
Gas Customers (only)					
Owners - Total		<u>34,485</u>	-	-	<u>1,020,268</u>
	Single Family	<u>27,479</u>			<u>858,096</u>
	Multi Family				
	Mobile Homes	<u>7,006</u>			<u>162,171</u>
Renters - Total		<u>11,050</u>	-	-	<u>127,181</u>
	Single Family	<u>10,327</u>			<u>122,824</u>
	Multi Family				
	Mobile Homes	<u>723</u>			<u>4,357</u>
Gas and Electric Total		<u>45,535</u>			<u>1,147,448</u>
ESA Multifamily Whole Building ³					
	Common Area	57		252	\$6,241,588
	In Unit	10,202		160.8326259	4662717.11
Totals:		<u>45,535</u>	-	-	<u>1,147,448</u>
					<u>67,097,241</u>

* D.21-06-015 permits IOUs to carry forward funds for committed work started in 2025 but finished in 2026. SoCalGas allowed its ESA Program contractors to complete and invoice such committed work by March 27, 2026 (the committed funds period). The amended results for main ESA Program include the committed funds period.

¹ Summary data which includes ESA Main Program (SF, MH) and MFWB.

² As of September 2019, all savings are calculated based on the following source:

DNV-GL "Energy Savings Assistance (ESA) Program Impact Evaluation Program Years 2015-2017." April 26, 2019.

³ The MFWB program is implemented by Richard Heath & Associates and SDG&E provides oversight to the detailed process.

⁴ Total Savings/Expenditures amount does not include credits, expenses, or required adjustments that are reflected in ESA Program Table 1. Totals do not include vacant units that are reflected in ESA Program Table 2 - ESA Main Program.

Shared Service Territory

Year	Utility in Shared Service Territory	Eligible Households in Shared Service Territory	Eligible households treated by both utilities in shared service territory
2025	PG&E	100,650	1,979
2025	SCE	1,233,783	12,255
2025	SDG&E	18,984	1

	A	B	C	D	E	F	G
1	PY 2025 Low Income Programs Annual Report ¹ ESA Program Table 5 ESA Program Direct Purchases & Installation Contractors SOUTHERN CALIFORNIA GAS COMPANY						
2	<u>Amended results noted in red font and underlined</u>						
3			Contractor Type (Check one or more if applicable)				2025 Annual
4	Contractor	County [2]	Private	CBO	WMDVBE	LIHEAP	Expenditures [3]
5	AMERICAN ECO SERVICES INC	LA, O, R, Sbe, Sba, SLO, V	x	-	x	-	<u>\$ 4,951,572</u>
6	EAGLE SYSTEMS INTERNATIONAL INC	F, I, Ke, Ki, LA, OC, R, <u>Sba</u> , Sbe, T, V	x	-	-	-	<u>\$ 13,286,932</u>
7	EAST LOS ANGELES COMMUNITY UNION	LA, OC, R, Sbe	-	x	x	-	<u>\$ 13,395,137</u>
8	ENVIRONMENTAL ASSESSMENT SERVICES	LA, OC, R, Sbe	x	-	x	-	<u>\$ 2,402,510</u>
9	FCI MANAGEMENT CONSULTANTS	LA, OC, R, Sbe	x	-	x	-	\$ 1,275,748
10	GREEN ENERGY SOLUTIONS	-	x	-	x	-	\$ 205,062
11	JOHN HARRISON CONTRACTING INC	I, R, Sbe	x	-	x	-	<u>\$ 1,554,967</u>
12	MARAVILLA FOUNDATION	Ke, LA, OC, R, Sbe	-	x	x	x	<u>\$ 14,147,133</u>
13	MGM ENERGY	F, Ke, Ki, LA, R, Sbe, T	x	-	-	-	<u>\$ 2,853,100</u>
14	PROTEUS INC	F, Ke, Ki, LA, T	-	x	x	-	<u>\$ 1,391,276</u>
15	QUALITY CONSERVATION SERVICES	F, I, Ke, Ki, LA, OC, R, Sbe, Sba, SLO, T, V	x	-	-	-	<u>\$ 17,640,968</u>
16	RELIABLE ENERGY MANAGEMENT INC	F, Ke, Ki, LA, OC, R, Sbe, Sba, SLO, T, V	x	-	x	-	\$ 1,598,320
17	RICHARD HEATH & ASSOCIATES INC	F, I, Ke, Ki, LA, OC, R, Sbe, Sba, SLO, T, V	x	-	-	-	<u>\$ 1,401,837</u>
18	STAPLES & ASSOCIATES	F, Ke, Ki, LA, SLO, T	x	-	-	-	<u>\$ 1,073,530</u>
19	VERCHES	-	x	-	-	-	\$ 8,400
20	WINEGARD ENERGY INC	F, Ke, Ki, I	x	-	-	-	<u>\$ 1,889,509</u>
21	Total Contractor Expenditures						<u>\$ 79,076,002</u>
22	Note: D.21-06-015 permits IOUs to carry forward funds for committed work started in 2025 but finished in 2026. SoCalGas allowed its ESA Program contractors to complete and invoice such committed funds period). The amended results for main ESA Program include the committed funds period.						
23							
24							
25	[1] Summary data which includes Main ESA Program (SF, MH).						
26							
27	[2] Key	Abbreviation					
28	Alameda	AL					
29	Los Angeles	LA					
30	Orange County	OC					
31	Ventura	V					
32	San Bernadino	Sbe					
33	Riverside	R					
34	Imperial	I					
35	Tulare	T					
36	Kings	Ki					
37	Kern	Ke					
38	Santa Barbara	Sba					
39	San Luis Obispo	SLO					
40	Fresno	F					
41	San Diego	SD					
42	San Fernando	SFERN					
43	Santa Clara	SC					
44	San Francisco	SF					
45	Santa Cruz	Scr					
46	Contra Costa	CC					
47	Solano	S					
48							
49	[3] The expenditures include contractor costs for Main ESA Program. Negative amounts (\$) are for chargebacks of advance payments not fully repaid yet.						
50							
51							

PY 2025* Low Income Programs Annual Report
ESA Program Table 6
ESA Program Installation Cost of Program Installation Contractors
SOUTHERN CALIFORNIA GAS COMPANY

Amended results noted in red font and underlined																		
Main ESA Program [5]	Unit of Measure	CBO/WMDVBE						Non-CBO/WMDVBE						2025 Program Total				
		Installations		Dwellings		Costs		Installations		Dwellings		Costs		Units Installed	Households [6]	Costs [1]	Cost/ Unit	Cost/ Household
		Units	%	Units	%	\$	%	Units	%	Units	%	\$	%					
Dwellings	Home	<u>1,899,484</u>	<u>46%</u>	34,249	63%	<u>\$ 38,749,419</u>	<u>51%</u>	<u>2,259,621</u>	<u>54%</u>	19,979	37%	<u>\$ 37,829,917</u>	<u>49%</u>	<u>4,159,105</u>	54,228	<u>\$ 76,579,335</u>	\$ 18	<u>\$ 1,412</u>
Appliances																		
High Efficiency Clothes Washer	Home	<u>1,491</u>	68%	<u>1,491</u>	68%	<u>\$ 1,577,027</u>	68%	<u>708</u>	32%	<u>708</u>	32%	<u>\$ 748,590</u>	32%	<u>2,199</u>	<u>2,199</u>	<u>\$ 2,325,618</u>	\$ 1,058	\$ 1,058
Refrigerators	Each		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
Freezers	Each		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
Clothes Dryer	Each		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
Dishwasher	Each		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
Domestic Hot Water																		
Other Domestic Hot Water [2]	Home	<u>43,927</u>	51%	<u>18,545</u>	47%	<u>\$ 1,161,781</u>	<u>49%</u>	<u>41,961</u>	49%	<u>20,649</u>	53%	<u>\$ 1,224,760</u>	51%	<u>85,888</u>	<u>39,194</u>	<u>\$ 2,386,541</u>	\$ 28	\$ 61
Water Heater Tank and Pipe Insulation [3]	Home	<u>9,014</u>	83%	<u>8,538</u>	83%	<u>\$ 305,718</u>	84%	<u>1,826</u>	17%	<u>1,744</u>	17%	<u>\$ 59,585</u>	16%	<u>10,840</u>	<u>10,282</u>	<u>\$ 365,303</u>	\$ 34	\$ 36
Water Heater Repair/Replacement	Home	<u>1,533</u>	62%	<u>1,532</u>	62%	<u>\$ 4,239,737</u>	60%	<u>937</u>	38%	<u>937</u>	38%	<u>\$ 2,803,969</u>	40%	<u>2,470</u>	<u>2,469</u>	<u>\$ 7,043,707</u>	<u>\$ 2,852</u>	<u>\$ 2,853</u>
Tankless Water Heater - New	Home	<u>477</u>	25%	<u>476</u>	25%	<u>\$ 1,836,450</u>	25%	<u>1,449</u>	75%	<u>1,449</u>	75%	<u>\$ 5,574,800</u>	75%	<u>1,926</u>	<u>1,925</u>	<u>\$ 7,411,250</u>	\$ 3,848	\$ 3,850
Thermostatic Shower Valve	Each	<u>16,188</u>	52%	<u>11,102</u>	52%	<u>\$ 957,556</u>	54%	<u>14,690</u>	48%	<u>10,049</u>	48%	<u>\$ 822,186</u>	46%	<u>30,878</u>	<u>21,151</u>	<u>\$ 1,779,742</u>	\$ 58	\$ 84
Combined Showerhead/TSV	Each		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
Heat Pump Water Heater	Each		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
Tub Diverter/Spout	Each	<u>3,090</u>	56%	<u>2,537</u>	57%	<u>\$ 473,180</u>	55%	<u>2,459</u>	44%	<u>1,947</u>	43%	<u>\$ 382,782</u>	45%	<u>5,549</u>	<u>4,484</u>	<u>\$ 855,962</u>	\$ 154	\$ 191
Solar Water Heating	Home		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
Enclosure																		
Air Sealing / Envelope [4]	Home	<u>42,272</u>	31%	<u>14,588</u>	52%	<u>\$ 2,322,425</u>	48%	<u>93,008</u>	69%	<u>13,391</u>	48%	<u>\$ 2,527,607</u>	52%	<u>135,280</u>	<u>27,979</u>	<u>\$ 4,850,032</u>	\$ 36	\$ 173
Diagnostic Air Sealing	Home		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
Attic Insulation	Home	<u>1,581,360</u>	46%	<u>1,522</u>	49%	<u>\$ 3,409,408</u>	46%	<u>1,869,511</u>	54%	<u>1,594</u>	51%	<u>\$ 4,023,409</u>	54%	<u>3,450,871</u>	<u>3,116</u>	<u>\$ 7,432,817</u>	\$ 2	\$ 2,385
Floor Insulation	Home		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
Minor Home Repair	Home	<u>54,599</u>	46%	<u>14,337</u>	53%	<u>\$ 1,346,010</u>	46%	<u>63,064</u>	54%	<u>12,741</u>	0%	<u>\$ 1,568,039</u>	54%	<u>117,663</u>	<u>27,078</u>	<u>\$ 2,914,049</u>	\$ 25	\$ 108
HVAC																		
Furnace Repair/Replacement	Home	<u>1,198</u>	68%	<u>1,150</u>	67%	<u>\$ 4,341,668</u>	67%	<u>559</u>	32%	<u>555</u>	33%	<u>\$ 2,164,580</u>	33%	<u>1,757</u>	<u>1,705</u>	<u>\$ 6,506,248</u>	<u>\$ 3,703</u>	<u>\$ 3,816</u>
Room A/C Replacement	Home		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
Central A/C Replacement	Home		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
Heat Pump Replacement	Home		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
Evaporative Coolers	Home		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
Duct Testing and Sealing	Home	<u>1,188</u>	76%	<u>469</u>	68%	<u>\$ 346,125</u>	73%	<u>373</u>	24%	<u>219</u>	32%	<u>\$ 130,436</u>	27%	<u>1,561</u>	<u>688</u>	<u>\$ 476,560</u>	<u>\$ 305</u>	<u>\$ 693</u>
Energy Efficient Fan Control	Home		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
Prescriptive Duct Sealing	Home	<u>8,488</u>	50%	<u>8,317</u>	50%	<u>\$ 1,195,863</u>	50%	<u>8,500</u>	50%	<u>8,286</u>	50%	<u>\$ 1,190,719</u>	50%	<u>16,988</u>	<u>16,603</u>	<u>\$ 2,386,583</u>	\$ 140	\$ 144
High Efficiency Forced Air Unit (HE FAU) Early Replacement	Home		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
Smart Thermostat	Home	<u>4,317</u>	43%	<u>4,221</u>	43%	<u>\$ 1,118,842</u>	43%	<u>5,712</u>	57%	<u>5,541</u>	57%	<u>\$ 1,482,476</u>	57%	<u>10,029</u>	<u>9,762</u>	<u>\$ 2,601,318</u>	\$ 259	\$ 266
High Efficiency Forced Air Unit (HE FAU) On Burnout	Home	<u>1,014</u>	78%	<u>1,014</u>	78%	<u>\$ 4,253,863</u>	78%	<u>290</u>	22%	<u>290</u>	22%	<u>\$ 1,232,564</u>	22%	<u>1,304</u>	<u>1,304</u>	<u>\$ 5,486,427</u>	<u>\$ 4,207</u>	<u>\$ 4,207</u>
Portable A/C	Home		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
Central Heat Pump - FS (propane or gas space)	Home		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
Wholehouse Fan	Home		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
Smart Fan Controller - New	Home	<u>5,968</u>	53%	<u>5,832</u>	53%	<u>\$ 954,880</u>	53%	<u>5,300</u>	47%	<u>5,167</u>	47%	<u>\$ 848,000</u>	47%	<u>11,268</u>	<u>10,999</u>	<u>\$ 1,802,880</u>	\$ 160	\$ 164
Maintenance																		
Furnace Clean and Tune	Home	<u>1,693</u>	25%	<u>1,657</u>	25%	<u>\$ 187,764</u>	33%	<u>5,085</u>	75%	<u>4,936</u>	75%	<u>\$ 383,853</u>	67%	<u>6,778</u>	<u>6,593</u>	<u>\$ 571,617</u>	\$ 84	\$ 87
Central A/C Tune-up	Home		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
Evaporative Cooling Maintenance	Home		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
Range Hood	Home		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
Lighting																		
Exterior Hard wired LED fixtures	Each		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
LED Reflector Bulbs	Each		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
LED A-Lamps	Each		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
Miscellaneous																		
Pool Pumps	Home		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
Smart Power Strips - Tier 1	Home		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
Smart Power Strips - Tier 2	Each		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
Air Purifier	Home		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
Cold Storage	Each		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
CO and Smoke Alarm	Home	<u>65,050</u>	53%	<u>17,099</u>	55%	<u>\$ 4,166,405</u>	53%	<u>58,518</u>	47%	<u>13,954</u>	45%	<u>\$ 3,737,021</u>	47%	<u>123,568</u>	<u>31,053</u>	<u>\$ 7,903,426</u>	\$ 64	\$ 255
Comprehensive Home Health and Safety Check-up	Home	<u>16,519</u>	55%	<u>16,519</u>	55%	<u>\$ 990,300</u>	55%	<u>13,574</u>	45%	<u>13,574</u>	45%	<u>\$ 813,300</u>	45%	<u>30,093</u>	<u>30,093</u>	<u>\$ 1,803,600</u>	\$ 60	\$ 60
Pilots																		
Ancillary Services																		
Commissioning	Home		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
Audit	Home		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
Administration	Home		0%		0%		0%		0%		0%		0%	-	-	\$ -	\$ -	\$ -
Outreach & Assessment																		
Customer Enrollment	Home	<u>20,309</u>	36%	<u>20,309</u>	36%	<u>\$ 3,130,107</u>	37%	<u>36,824</u>	64%	<u>36,824</u>	64%	<u>\$ 5,337,343</u>	63%	<u>57,133</u>	<u>57,133</u>	<u>\$ 8,467,449</u>	\$ 148	\$ 148
In-Home Education	Home	<u>19,789</u>	36%	<u>19,789</u>	36%	<u>\$ 434,310</u>	36%	<u>35,273</u>	64%	<u>35,273</u>	64%	<u>\$ 773,898</u>	64%	<u>55,062</u>	<u>55,062</u>	<u>\$ 1,208,207</u>	\$ 22	\$ 22

* D.21-06-015 permits IOUs to carry forward funds for committed work started in 2025 but finished in 2026. SoCalGas allowed its ESA Program contractors to complete and invoice such committed work by March 27, 2026 (the committed funds period). The amended results for main ESA Program include the committed funds period.

[1] Total Savings/Expenditures amount does not include credits, expenses or required adjustments that are reflected in ESA Program Table 1.

[2] Includes Faucet Aerators and Low Flow Showerheads.

[3] Includes Water Heater Blankets and Water Heater Pipe Insulation.

[4] Envelope and Air Sealing Measures may include outlet cover plate gaskets, attic access weatherization, weatherstripping - door, caulking and minor home repairs. Minor home repairs predominantly are door jamb repair / replacement, door repair, and window putty.

[5] Any measures noted as "NEW" have been added during the course of this program year; those noted as "REMOVED" are no longer offered by the program but have been kept for tracking purposes.

[6] May include work done on a single household by multiple contractors.

	A	B	C	D	E
1	PY 2025* Low Income Programs Annual Report ESA Program Table 7 Expenditures Recorded by Cost Element SOUTHERN CALIFORNIA GAS COMPANY				
2	<u>Amended results noted in red font and underlined</u>				
3	ESA Program:	Labor ¹	Non-Labor ²	Contractor ³	Total
4	Energy Efficiency				
5	ESA Program Main (SF, MH)				
6	Appliances	\$ -	\$ -	\$ <u>2,325,618</u>	\$ <u>2,325,618</u>
7	Domestic Hot Water ⁴	\$ -	\$ -	\$ <u>20,035,284</u>	\$ <u>20,035,284</u>
8	Enclosure ⁴	\$ -	\$ -	\$ <u>15,012,348</u>	\$ <u>15,012,348</u>
9	HVAC ⁴	\$ -	\$ -	\$ <u>20,111,277</u>	\$ <u>20,111,277</u>
10	Maintenance ⁴	\$ -	\$ -	\$ <u>10,351,291</u>	\$ <u>10,351,291</u>
11	Lighting	\$ -	\$ -	\$ -	\$ -
12	Miscellaneous ⁵	\$ -	\$ -	\$ 213,462	\$ 213,462
13	Customer Enrollment ⁴	\$ -	\$ 4,500	\$ <u>8,467,449</u>	\$ <u>8,471,949</u>
14	In Home Education	\$ -	\$ 33,114	\$ 1,208,207	\$ 1,241,322
15	Pilot	\$ -	\$ -	\$ -	\$ -
16	ESA Program Main Total	\$ -	\$ 37,614	\$ <u>77,724,936</u>	\$ <u>77,762,550</u>
17	Multifamily Whole Building ^{7, 8}				
18	Appliances	\$ -	\$ -	\$ -	\$ -
19	Domestic Hot Water ⁴	\$ -	\$ -	\$ -	\$ -
20	Enclosure ⁴	\$ -	\$ -	\$ -	\$ -
21	HVAC ⁴	\$ -	\$ -	\$ -	\$ -
22	Maintenance ⁴	\$ -	\$ -	\$ -	\$ -
23	Lighting	\$ -	\$ -	\$ -	\$ -
24	Miscellaneous ⁵	\$ -	\$ -	\$ -	\$ -
25	Customer Enrollment ⁴	\$ -	\$ -	\$ -	\$ -
26	In Home Education	\$ -	\$ -	\$ -	\$ -
27	Pilot	\$ -	\$ -	\$ -	\$ -
28	MFWB Total	\$ -	\$ -	\$ 13,637,142	\$ 13,637,142
29	Pilot Plus/Deep ⁷				
30	Appliances	\$ -	\$ -	\$ -	\$ -
31	Domestic Hot Water ⁴	\$ -	\$ -	\$ -	\$ -
32	Enclosure ⁴	\$ -	\$ -	\$ -	\$ -
33	HVAC ⁴	\$ -	\$ -	\$ -	\$ -
34	Maintenance ⁴	\$ -	\$ -	\$ -	\$ -
35	Lighting	\$ -	\$ -	\$ -	\$ -
36	Miscellaneous ⁵	\$ -	\$ -	\$ -	\$ -
37	Customer Enrollment ⁴	\$ -	\$ -	\$ -	\$ -
38	In Home Education	\$ -	\$ -	\$ -	\$ -
39	Pilot	\$ -	\$ -	\$ -	\$ -
40	Pilot Plus/Deep Total	\$ -	\$ -	\$ 1,654,784	\$ 1,654,784
41	CSD Leveraging				
42	Appliances	\$ -	\$ -	\$ -	\$ -
43	Domestic Hot Water ⁴	\$ -	\$ -	\$ -	\$ -
44	Enclosure ⁴	\$ -	\$ -	\$ -	\$ -
45	HVAC ⁴	\$ -	\$ -	\$ -	\$ -
46	Maintenance ⁴	\$ -	\$ -	\$ -	\$ -
47	Lighting	\$ -	\$ -	\$ -	\$ -
48	Miscellaneous ⁵	\$ -	\$ -	\$ -	\$ -
49	Customer Enrollment ⁴	\$ -	\$ -	\$ -	\$ -
50	In Home Education	\$ -	\$ -	\$ -	\$ -
51	Pilot	\$ -	\$ -	\$ -	\$ -
52	CSD Total	\$ -	\$ -	\$ -	\$ -
53	Energy Efficiency TOTAL	\$ -	\$ 37,614	\$ <u>93,016,862</u>	\$ <u>93,054,476</u>
54	Administrative ⁶				
55	Training Center	\$ 551,327	\$ 4,414	\$ -	\$ 555,740
56	Workforce Education and Training	\$ -	\$ -	\$ -	\$ -
57	Inspections	\$ -	\$ -	\$ <u>1,366,066</u>	\$ <u>1,366,066</u>
58	Marketing and Outreach	\$ -	\$ 1,055,584	\$ -	\$ 1,055,584
59	Statewide Marketing Education and Outreach	\$ -	\$ -	\$ -	\$ -
60	Measurement and Evaluation Studies	\$ -	\$ 41,731	\$ -	\$ 41,731
61	Regulatory Compliance	\$ 377,345	\$ 96,963	\$ -	\$ 474,308
62	General Administration	\$ 4,388,232	\$ <u>2,786,679</u>	\$ -	\$ <u>7,174,911</u>
63	CPUC Energy Division	\$ -	\$ 16,918	\$ -	\$ 16,918
64	MFWB Admin ⁷	\$ 1,448,588	\$ -	\$ -	\$ 1,448,588
65	Pilot Plus/Deep Admin	\$ 13,276	\$ -	\$ -	\$ 13,276
66	Administrative Total	\$ 6,778,768	\$ <u>4,002,288</u>	\$ <u>1,366,066</u>	\$ <u>12,147,122</u>
67					
68	TOTAL PROGRAM COSTS	\$ 6,778,768	\$ <u>4,039,903</u>	\$ <u>94,382,928</u>	\$ <u>105,201,598</u>
69	* D.21-06-015 permits IOUs to carry forward funds for committed work started in 2025 but finished in 2026. <u>SoCalGas allowed its ESA Program contractors to complete and invoice such committed work by March 27, 2026 (the committed funds period). The amended results for main ESA Program include the committed funds period.</u>				
70					
71					
72	¹ Labor: Utility staff labor including labor indirects (vacation and sick leave, payroll taxes).				
73	² Non-Labor: All other non-labor costs excluding contractor costs defined below.				
74	³ Contractor: Expenses associated with contractor installations, Weatherization, Inspections, Outreach and Assessment, and In Home Energy Education services.				
75	⁴ Includes cash discount and other misc. credits in non-labor.				
76	⁵ Performance-Based Incentive (PBI) for contractors meeting their therm goal per quarter and chargebacks.				
77	⁶ Note that "below the line" summary costs if applicable includes ESA Main Program (SF, MH), MFWB, Pilot Plus/Deep and CSD Leveraging.				
78	⁷ Includes expenses recorded in SoCalGas SAP and from SDG&E.				
79	⁸ The MFWB program is implemented by Richard Heath & Associates and SDG&E provides oversight to the detailed process.				

	A	B	C	D	E	F	G	H
1	PY 2025 Low Income Programs Annual Report ¹ ESA Program Table 8 ESA Program Homes Unwilling / Unable to Participate SOUTHERN CALIFORNIA GAS COMPANY							
2	Reason Provided							
3	County	Customer Unwilling/Declined Program Measures	Customer Unavailable - Scheduling Conflicts	Hazardous Environment (unsafe/unclean)	Landlord Refused to Authorize Participation	Household Income Exceeds Allowable Limits	Unable to Provide Required Documentation	Other Infeasible/ Ineligible
4	Fresno	391	4	0	1	8	4	7
5	Imperial	10	14	0	1	11	3	1
6	Kern	214	5	0	14	5	9	9
7	Kings	500	3	1	17	35	1	17
8	Los Angeles	1,473	445	3	243	136	478	118
9	Orange	222	3	0	36	19	6	27
10	Riverside	913	54	1	151	145	27	280
11	San Bernardino	796	11	0	128	103	19	68
12	San Luis Obispo	6	1	0	1	1	1	2
13	Santa Barbara	7	1	0	0	0	0	1
14	Tulare	1,711	13	0	54	77	13	34
15	Ventura	2	1	0	0	1	0	6
16	Total	6,245	555	5	646	541	561	570
17								
18	¹ Summary data for Main ESA Program and does not include CSD Leveraging.							
19								
20								
21								
22	ESA Coordinated Treatment (SCE and SoCalGas only)							
23	Reason Why Household did not Receive Additional Measures from one Utility or Partnering Agency ¹							
24	# of Households Received Measures from one Utility, but not other Utility or Partnering Agency	# of Customer Unwilling/Declined Program Measures	# of Customer Unavailable - Scheduling Conflicts	# of Hazardous Environment (unsafe/unclean)	# of Landlord Refused to Authorize Participation	# of Other Infeasible/ Ineligible		
25								
26	3,317	2,679	375	2	261	-		
27								
28	¹ Summary data for Main ESA Program and does not include CSD Leveraging.							

PY 2025 Energy Savings Assistance Program Annual Report
ESA Program Table 9
Energy Rate Used for Bill Savings Calculation
SOUTHERN CALIFORNIA GAS COMPANY

1
2

	Residential Energy Used for Bill Savings Calculation ¹		
	Year	\$/kWh	\$/Therm ³
3			
4			
5	2025	N/A	1.67
6	2026	N/A	1.72
7	2027	N/A	1.77
8	2028	N/A	1.82
9	2029	N/A	1.88
10	2030	N/A	1.94
11	2031	N/A	1.99
12	2032	N/A	2.05
13	2033	N/A	2.12
14	2034	N/A	2.18
15	2035	N/A	2.24
16	2036	N/A	2.31
17	2037	N/A	2.38
18	2038	N/A	2.45
19	2039	N/A	2.53
20	2040	N/A	2.60
21	2041	N/A	2.68
22	2042	N/A	2.76
23	2043	N/A	2.84
24	2044	N/A	2.93
25	2045	N/A	3.02
26	2046	N/A	3.11
27	2047	N/A	3.20
28	2048	N/A	3.30
29	2049	N/A	3.39
30	2050	N/A	3.50

	Non-Residential Energy Used for Bill Savings Calculation (MFWB) ²		
	Year	\$/kWh	\$/Therm ³
3			
4			
5	2025	N/A	1.67
6	2026	N/A	1.72
7	2027	N/A	1.77
8	2028	N/A	1.82
9	2029	N/A	1.88
10	2030	N/A	1.94
11	2031	N/A	1.99
12	2032	N/A	2.05
13	2033	N/A	2.12
14	2034	N/A	2.18
15	2035	N/A	2.24
16	2036	N/A	2.31
17	2037	N/A	2.38
18	2038	N/A	2.45
19	2039	N/A	2.53
20	2040	N/A	2.60
21	2041	N/A	2.68
22	2042	N/A	2.76
23	2043	N/A	2.84
24	2044	N/A	2.93
25	2045	N/A	3.02
26	2046	N/A	3.11
27	2047	N/A	3.20
28	2048	N/A	3.30
29	2049	N/A	3.39
30	2050	N/A	3.50

31

32 ¹ Summary includes ESA Main Program (SF, MH) Pilot Plus and Pilot Deep and CSD Leveraging. Building Electrification and Clean Energy Homes are not applicable.

33 ² Summary data includes MFWB.

34 ³ Non-residential customers billed at the residential rate per AL 5915 Attachment B. Actual 2025 energy rate per therm paid by ESA Program participants. Energy rate beyond 2025 is escalated 3% annually

	A	B	C	D	E
1	PY 2025* Low Income Programs Annual Report ESA Program Table 10 Bill Savings Calculations by Program Year SOUTHERN CALIFORNIA GAS COMPANY				
2	Table 10 - ESA Program Main (SF, MH)				
3	<u>Amended results noted in red font and underlined</u>				
4	Program Year	Program Costs	Program Lifecycle Bill Savings	Program Bill Savings/ Cost Ratio	Per Home Average Lifecycle Bill Savings
5	2014	\$93,781,355	\$13,802,052	0.15	\$147
6	2015	\$74,817,588	\$9,458,585	0.13	\$118
7	2016	\$58,777,190	\$10,005,458	0.17	\$143
8	2017	\$79,364,204	\$10,752,700	0.14	\$115
9	2018	\$93,149,896	\$10,559,891	0.11	\$106
10	2019	\$111,539,060	\$5,544,743	0.05	\$45
11	2020	\$96,838,449	\$5,169,470	0.05	\$41
12	2021	\$111,430,005	\$6,952,602	0.06	\$53
13	2022	\$104,436,368	\$6,803,313	0.07	\$65
14	2023	\$79,536,635	\$15,388,205	0.19	\$296
15	2024	\$84,811,095	\$23,033,897	0.27	\$461
16	2025	<u>\$88,447,808</u>	<u>\$20,165,923</u>	<u>0.23</u>	<u>\$443</u>
17					
18	* D.21-06-015 permits IOUs to carry forward funds for committed work started in 2025 but finished in 2026. SoCalGas allowed its ESA Program contractors to complete and invoice such committed work by March 27, 2026 (the committed funds period). Final main ESA Program results including the committed funds period are included in this report.				
19	Note: Savings are based on the results of the 2015-2017 Impact Evaluation completed in 2019, starting from PY2019.				
20					
21	Table 10A - Pilot Plus/Deep				
22	Program Year	Program Costs	Program Lifecycle Bill Savings	Program Bill Savings/ Cost Ratio	Per Home Average Lifecycle Bill Savings
23	2014				
24	2015				
25	2016				
26	2017				
27	2018				
28	2019 ²				
29	2020				
30	2021				
31	2022	N/A	N/A	N/A	N/A
32	2023	\$619,352	\$12,326	0.02	\$6,163
33	2024	\$1,631,552	\$203,973	0.13	\$7,845
34	2025	\$4,393,451	\$145,938	0.03	\$1,028
35					
36	Note: Combined data for SoCalGas and SCE.				
37					
38	Table 10B - MFWB				
39	Program Year	Program Costs	Program Lifecycle Bill Savings	Program Bill Savings/ Cost Ratio	Per Home Average Lifecycle Bill Savings
40	2014				
41	2015				
42	2016				
43	2017				
44	2018				
45	2019 ²				
46	2020				
47	2021				
48	2022	\$2,658,870	\$3,161,987	1.19	\$1,143
49	2023	\$4,008,225	\$2,032,208	0.51	\$351
50	2024	\$6,169,744	\$3,717,345	0.60	\$431
51	2025	\$15,085,731	\$10,402,013	0.69	\$1,020
52					
53	Note: The MFWB program is implemented by Richard Heath & Associates and SDG&E provides oversight to the detailed process.				

	A	B
1	PY 2025* Low Income Programs Annual Report	
2	ESA Program Table 12	
3	Categorical and Other Enrollment	
4	SOUTHERN CALIFORNIA GAS COMPANY	
5	<u>Amended results noted in red font and underlined</u>	
6	ESA Main (SF, MH)	
7	Type of Enrollment	Number of Homes Treated
8	Women, Infants, and Children Program (WIC)	<u>918</u>
9	Supplemental Security Income (SSI)	<u>590</u>
10	CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	<u>1,372</u>
11	CalWORKs/Temporary Assistance for Needy Families (TANF)	<u>48</u>
12	Tribal TANF	3
13	Medi-Cal	<u>7,109</u>
14	Medicaid/Medi-Cal for Families	27
15	Healthy Families A&B	0
16	National School Lunch Program (NSLP) - Free Lunch	16
17	Low-income Home Energy Assistance Program (LIHEAP)	6
18	Bureau of Indian Affairs General Assistance	0
19	Head Start Income Eligible - (Tribal Only)	1
20	Other	<u>37</u>
21	Total	<u>10,127</u>
22		
23	* D.21-06-015 permits IOUs to carry forward funds for committed work started in 2025 but finished in 2026. <u>SoCalGas allowed its ESA Program contractors to complete and invoice such committed work by March 27, 2026 (the committed funds period). The amended results for main ESA Program include the committed funds period.</u>	
24		
25		
26	Pilot Plus/Deep	
27	Type of Enrollment	Number of Homes Treated
28	Women, Infants, and Children Program (WIC)	1
29	Supplemental Security Income (SSI)	1
30	CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	8
31	CalWORKs/Temporary Assistance for Needy Families (TANF)	1
32	Tribal TANF	-
33	Medicaid/Medi-Cal for Families	40
34	Healthy Families A&B	-
35	National School Lunch Program (NSLP) - Free Lunch	-
36	Low-income Home Energy Assistance Program (LIHEAP)	-
37	Bureau of Indian Affairs General Assistance	-
38	Head Start Income Eligible - (Tribal Only)	-
39	CARE Income Certified	-
40	80/20 Rule	-
41	Targeted Self Certification	-
42	Other - Categorical	-
43	Standard Enrollment	91
44	Total	142

**PY 2025 Low Income Programs Annual Report
ESA Program Table 13A
Leveraging & Integration
SOUTHERN CALIFORNIA GAS COMPANY**

ESA Program Main (SF, MH)

Coordination Type ¹	Partner	Brief Description of Effort	Relationship Outside the IOU?	MOU Present?	Amount of Dollars Saved ²	Amount of Energy Savings ³	Other Measureable Benefits ³	Enrollments Resulting from Leveraging Effort ⁴	Methodology ⁵	Meets all Criteria	If not, Explain
Leveraging	Anaheim Public Utilities (APU)	SoCalGas has a signed leveraging contract with APU	Yes	Yes	\$1,275,060	N/A	N/A	1,384	See note "A".	Yes	N/A
Leveraging	Riverside Public Utilities	SoCalGas has a signed leveraging contract with RPI	Yes	Yes	\$525,783	N/A	N/A	339	See note "A".	Yes	N/A
Leveraging	Eastern Municipal Water District (EWMD)	EMWD co-funded the ESA Program High Efficiency Clothes Washer Measure (HECW) for unit installed in overlapping territory.	Yes	Yes	\$715	N/A	N/A	11	See note "A".	Yes	N/A
Leveraging	Liberty Utilities	Liberty Utilities co-funded the ESA Program High Efficiency Clothes Washer Measure (HECW) for unit installed in overlapping territory.	Yes	Yes	\$420	N/A	N/A	62	See note "A".	Yes	N/A
Leveraging	Fontana Water Company	Fontana Water Company co-funded the ESA Program High Efficiency Clothes Washer Measure (HECW) for unit installed in overlapping territory.	Yes	Yes	\$150	N/A	N/A	1	See note "A".	Yes	N/A
Leveraging	Metropolitan Water District	Metropolitan Water District co-funded the ESA Program High Efficiency Clothes Washer Measure (HECW), premium efficiency toilets, and other water measures installed in overlapping territory.	Yes	Yes	\$659,050	N/A	N/A	19,384	See note "A".	Yes	N/A
Leveraging	San Gabriel Valley Water Company	San Gabriel Valley Water Company co-funded the ESA Program High Efficiency Clothes Washer Measure (HECW) for unit installed in overlapping territory.	Yes	Yes	\$300	N/A	N/A	2	See note "A".	Yes	N/A
Leveraging	California American Water	California American Water co-funded the ESA Program High Efficiency Clothes Washer Measure (HECW) for unit installed in overlapping territory.	Yes	Yes	\$1,600	N/A	N/A	95	See note "A".	Yes	N/A
Leveraging	Moulton Niguel Water District	Moulton Niguel Water District co-funded the ESA Program High Efficiency Clothes Washer Measure (HECW) for unit installed in overlapping territory.	Yes	Yes	\$421	N/A	N/A	15	See note "A".	Yes	N/A
Leveraging	Rancho California Water District	Rancho California Water District co-funded the ESA Program High Efficiency Clothes Washer Measure (HECW) for unit installed in overlapping territory.	Yes	Yes	\$1,663	N/A	N/A	64	See note "A".	Yes	N/A
Leveraging	Los Angeles Water & Power	SoCalGas has a contract with LADWP to co-funded the ESA Program High Efficiency Clothes Washer Measure (HECW), premium efficiency toilets, and other water measures installed in overlapping territory.	Yes	Yes	\$23,609	N/A	N/A	272	See note "A".	Yes	N/A

\$2,488,771

MFWB

Coordination Type ¹	Partner	Brief Description of Effort	Relationship Outside the IOU?	MOU Present?	Amount of Dollars Saved ²	Amount of Energy Savings ³	Other Measureable Benefits ³	Enrollments Resulting from Leveraging Effort ⁴	Methodology ⁵	Meets all Criteria	If not, Explain

Note: The MFWB program is implemented by Richard Heath & Associates and SDG&E provides oversight to the detailed process. The program Implementer does not have any leveraging projects within SoCalGas territory to report in 2025

Pilot Plus/Deep

Coordination Type ¹	Partner	Brief Description of Effort	Relationship Outside the IOU?	MOU Present?	Amount of Dollars Saved ²	Amount of Energy Savings ³	Other Measureable Benefits ³	Enrollments Resulting from Leveraging Effort ⁴	Methodology ⁵	Meets all Criteria	If not, Explain

Note: Pilot Plus/Deep is a targeted pilot being marketed to a limited customer list. Therefore, no leveraging is taking place at this time.

¹ Leveraging, Interdepartmental integration, Program Coordination, Data Sharing, ME&O, etc.

² Leveraging and Integration efforts are measurable and quantifiable in terms of dollars saved / leveraged by the IOU (Shared/contributed/donated resources, shared marketing materials, shared information technology, shared programmatic infrastructure, among others are just some examples of cost and/or resource savings to the IOU).

³ Annual Energy savings/benefits for measures installation in 2024 are captured in the overall ESA savings totals. SoCalGas does not track and/or measure electric or water savings for the municipalities or water agencies.

⁴ Total Enrollments. Leveraging efforts are measurable and quantifiable in terms of program enrollment increases and/or customers served. Enrollments represent joint customer participation in both utility programs.

⁵ In footnotes, provide information on methodology used to calculate cost and/or resource savings. See Note "A".

Fields not applicable to specific efforts are marked "N/A"

"A"	Dollar savings based on invoiced amount for co-funded measures. Enrollments calculated by dividing (dollar savings) by (per measure cost). Result is additional customers that can be treated with High Efficiency Washer (rounded up). Therm savings calculated by multiplying (additional customers that can be treated with High Efficiency Washer) by (per measure therm savings).
-----	--

**PY 2025 Low Income Programs Annual Report
 ESA Program Table 13B
 Clean Energy Referral, Leveraging, and Coordination
 SOUTHERN CALIFORNIA GAS COMPANY**

Partner	Brief Description of Effort	Outbound	Collaboration		Inbound	# of Enrollments from Successful Leads/Referrals [5]
		# of Referrals [1]	# of Leveraging Relationships [2]	# of Coordination Efforts [3]	# of Leads [4]	
CARE	CARE customers who are PEV approved are shared with ESA Program.				40,412	3,069
Water Agencies [6]	SoCalGas provides the ability for water agencies to capture water savings through co-funding opportunities.		9 Agencies			19,636
Municipal Electric Providers [7]	SoCalGas provides co-funding opportunities to electric and water providers who might otherwise not offer energy savings measures.		3 Providers			1,993
Pilot Plus/Deep to Main [8]	Number of Homes Enrolled in ESA Main as a result of being referred by ESA Whole Home due to home not being able to meet minimum 5% for ESA Whole Home participation.				146	8

[1] Outbound referrals being given to the Partner Program by ESA Program.

[2] Activities that involve the sharing resources to jointly support program delivery or administration. (Example: Sharing of Lead Lists, Cost Splitting, etc.)

[3] Activities related to program communication (marketing), collaboration of events, and alignment of activities (outreach events, tradeshow, etc.) to support program awareness and delivery.

[4] Inbound customer leads or referrals to ESA Program from the Partner Program.

[5] Enrollments that results from the Leads or Referrals supplied by the Partner.

[6] Water Agencies include: Eastern Municipal Water District, Fontana Water Company, Anaheim Public Utilities, Liberty Utilities, Metropolitan Water District, San Gabriel Valley Water Company, California American Water, Moulton Niguel Water District, and Rancho California Water District.

[7] Municipal Electric Providers include: Anaheim Public Utilities, Los Angeles Department of Water and Power, and Riverside Public Utilities.

[8] Pilot Plus/Deep (also known as ESA Whole Home) is a joint pilot with SoCalGas and SCE.

PY 2025 Low Income Programs Annual Report
ESA Program Table 14
Expenditures for Pilots and Studies
SOUTHERN CALIFORNIA GAS COMPANY

	Authorized 2021-2026 Funding ¹			2025 Expenses			Cycle to Date Expenses			% of Budget Expended		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Pilots												
ESA Pilot Plus/Deep Program	N/A	\$ 32,552,726	\$ 32,552,726	N/A	\$ 1,668,060	\$ 1,668,060	N/A	\$ 2,604,022	\$ 2,604,022	N/A	5%	5%
Total Pilots	N/A	\$ 32,552,726	\$ 32,552,726	N/A	\$ 1,668,060	\$ 1,668,060	N/A	\$ 2,604,022	\$ 2,604,022	N/A	5%	5%
Studies												
Needs Assessment (LINA) ²	N/A	\$ 62,500	\$ 62,500	N/A	\$ -	\$ -	N/A	\$ 124,834	\$ 124,834		0%	0%
Joint IOU - Multifamily CAM Process Evaluation ³	N/A	\$ 75,000	\$ 75,000	N/A	\$ -	\$ -	N/A	\$ 67,020	\$ 67,020	N/A	0%	0%
2020 Non Energy Benefits Evaluation (NEB's) ⁴	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	\$ 37,488	\$ 37,488	N/A	0%	0%
Joint IOU - 2022 Low Income Needs Assessment (LINA) Study	N/A	\$ 62,500	\$ 62,500	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	0%	0%
Joint IOU - 2025 Low Income Needs Assessment (LINA) Study	N/A	\$ 62,500	\$ 62,500	N/A	\$ 7,721	\$ 7,721	N/A	\$ 62,461	\$ 62,461	N/A	12%	12%
Joint IOU - 2028 Low Income Needs Assessment (LINA) Study	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	0%	0%
Joint IOU - Statewide CARE-ESA Categorical Study	N/A	\$ 18,750	\$ 18,750	N/A	\$ -	\$ -	N/A	\$ 18,718	\$ 18,718	N/A	0%	0%
Load Impact Evaluation Study	N/A	\$ 375,000	\$ 375,000	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	0%	0%
Equity Criteria and Non Energy Benefits Evaluation (NEB's)	N/A	\$ 125,000	\$ 125,000	N/A	\$ -	\$ -	N/A	\$ 24,224	\$ 24,224	N/A	0%	0%
Rapid Feedback Research and Analysis	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	0%	0%
Joint IOU - Process Evaluation Studies (1-4 Studies)	N/A	\$ 125,000	\$ 125,000	N/A	\$ -	\$ -	N/A	\$ -	\$ -	N/A	0%	0%
Potential Ad Hoc Tasks	N/A	\$ 300,000	\$ 300,000	N/A	\$ 34,010	\$ 34,010	N/A	\$ 34,010	\$ 34,010	N/A	11%	11%
Total Studies ⁵		\$ 1,068,750	\$ 1,068,750	N/A	\$ 41,731	\$ 41,731	N/A	\$ 139,413	\$ 139,413	N/A	4%	4%

¹ Reflects the authorized funding in D.21-06-015 and AL 5501-G-A plus additional funds allocated from prior-cycle unspent budgets.

² LINA Study funded out of prior cycle unspent Funds per AL 5558.

³ MF CAM study funded out of MF CAM prior cycle unspent funds per AL 5744.

⁴ Cycle-to-date amount related to 2020 and 2021 activity.

⁵ Total studies amount includes 2021-2026 authorized budget in D.21-06-015 only as well as associated spending.

PY 2025 Low Income Programs Annual Report
ESA Program Table 15
Tribal Outreach
SOUTHERN CALIFORNIA GAS COMPANY

Outreach Status	Quantity (Includes CARE, FERA, and ESA)	List of Participating Tribes
Tribes completed ESA Program Meet & Confer	18	Agua Caliente Band of Cahuilla Indians, Barbareño/Ventureño Band of Mission Indians, Cahuilla Band of Indians, Chemehuevi Indian Tribe, Fort Mojave Indian Tribe, Juañeno Band of Mission Indians, Kern Valley Indian Community - Nuwa (Kawaiisu), Los Coyotes Band of Cahuilla and Cupeño Indians, Morongo Band of Mission Indians, Owens Valley Career Development Center - Tule River, Pechanga Band of Indians, Santa Ynez Band of Chumash Indians, Soboba Band of Luiseño Indians, Southern California Tribal Chairmen's Association, The Salinan Tribe of Monterey and San Luis Obispo Counties, Torres Martinez Desert Cahuilla Indians, Tachi Yokut, Tule River
Tribes requested outreach materials or applications	18	Agua Caliente Band of Cahuilla Indians, Barbareño/Ventureño Band of Mission Indians, Cahuilla Band of Indians, Chemehuevi Indian Tribe, Fort Mojave Indian Tribe, Juañeno Band of Mission Indians, Kern Valley Indian Community - Nuwa (Kawaiisu), Los Coyotes Band of Cahuilla and Cupeño Indians, Morongo Band of Mission Indians, Owens Valley Career Development Center - Tule River, Pechanga Band of Indians, Santa Ynez Band of Chumash Indians, Soboba Band of Luiseño Indians, Southern California Tribal Chairmen's Association, The Salinan Tribe of Monterey and San Luis Obispo Counties, Torres Martinez Desert Cahuilla Indians, Tachi Yokut, Tule River
Tribes who have not accepted offer to Meet and Confer	0	
Non-Federally Recognized Tribes who participated in Meet & Confer	4	Barbareño/Ventureño Band of Mission Indians, Juañeno Band of Mission Indians, Kern Valley Indian Community - Nuwa (Kawaiisu), The Salinan Tribe of Monterey and San Luis Obispo Counties
Tribes and Housing Authority sites involved in Focused Project/ESA Program Partnership offer on Tribal Lands	0	
Housing Authority and Tribal Temporary Assistance for Needy Families (TANF) office who received outreach (this includes email, U.S. mail, and/or phone calls)	3	Owens Valley Career Development Center - Tule River, Soboba Band of Luiseño Indians, Torres Martinez Desert Cahuilla Indians
Housing Authority and TANF offices who participated in Meet and Confer	3	Owens Valley Career Development Center - Tule River, Soboba Band of Luiseño Indians, Torres Martinez Desert Cahuilla Indians

PY 2025* Low Income Programs Annual Report
ESA Program Table 16
Customer Segments/Needs State by Demographic, Financial, Location, and Health Conditions
SOUTHERN CALIFORNIA GAS COMPANY

Amended results noted in red font and underlined
ESA Main (SF, MH)

Customer Segments	# of Households Eligible [1]	# of Households Treated [17]	Enrollment Rate = (C/B)	# of Households Contacted	Rate of Uptake = (C/E)	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving and HCS Measures)	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving Measures only)	Avg. Peak Demand Savings (kW) Per Treated Household	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving and HCS Measures)	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving Measures only)	Avg. Cost Per Treated Households	Avg. HH Energy Savings (kWh) / Total Annual Energy Use (kWh)	Avg. HH Energy Savings (Therms) / Total Annual Energy Use (Therms) [18]
Demographic													
Housing Type													
SF	1,039,808	<u>37,806</u>	4%	130,309	<u>29%</u>				<u>24.6</u>	<u>26.1</u>	<u>\$ 1,381.81</u>		0.000002
MH	115,957	<u>7,729</u>	7%	450	<u>1718%</u>				<u>21.6</u>	<u>22.0</u>	<u>\$ 1,293.35</u>		
Rent vs. Own													
Own	788,781	<u>34,485</u>	4%		0%				<u>29.4</u>	<u>29.9</u>	<u>\$ 1,656.46</u>		0.000003
Rent	1,319,476	<u>11,050</u>	1%		0%				<u>11.5</u>	<u>11.4</u>	<u>\$ 462.83</u>		0.000002
Vacant			0%		0%								
Previous vs. New Participant													
New participant		<u>13,406</u>	0%	88,529	15%				<u>25.3</u>	<u>25.7</u>	<u>\$ 1,373.69</u>		0.000005
Previous Participant		<u>32,129</u>	0%	59,421	<u>54%</u>				<u>25.0</u>	<u>25.3</u>	<u>\$ 1,363.93</u>		0.000002
Seniors [3]	869,111	<u>15,596</u>	2%		0%				<u>26.3</u>	<u>26.6</u>	<u>\$ 1,496.75</u>		0.000004
Veterans [4]	135,375	<u>305</u>	0%		0%				<u>27.3</u>	<u>27.3</u>	<u>\$ 1,401.26</u>		0.000233
Hard-to-Reach [5]	781,935	<u>17,386</u>	2%	40,818	<u>43%</u>				<u>21.6</u>	<u>21.9</u>	<u>\$ 1,200.22</u>		0.000002
Vulnerable [6]	1,347,171	<u>39,144</u>	3%	134,312	<u>29%</u>				<u>24.5</u>	<u>24.7</u>	<u>\$ 1,320.07</u>		0.000002
Location													
DAC [7]	1,306,904	<u>36,807</u>	3%	130,687	<u>28%</u>				<u>24.5</u>	<u>24.7</u>	<u>\$ 1,315.74</u>		0.000002
Rural	284,010	<u>8,946</u>	3%	23,161	<u>39%</u>				<u>31.9</u>	<u>32.5</u>	<u>\$ 1,547.67</u>		0.000005
Tribal [8]	4,445	<u>35</u>	1%	51	69%				<u>15.7</u>	<u>17.8</u>	<u>\$ 1,086.09</u>		0.002385
PSPS Zone	N/A	<u>N/A</u>	N/A	N/A	N/A								
Wildfire Zone [9]	915,416	<u>21,919</u>	2%	66,543	<u>33%</u>				<u>27.1</u>	<u>27.6</u>	<u>\$ 1,470.71</u>		0.000003
Climate Zone													
4	11,195	<u>71</u>	1%	106	67%				<u>20.1</u>	<u>21.2</u>	<u>\$ 1,463.15</u>		0.000082
5	40,075	<u>959</u>	2%	1,292	74%				<u>22.0</u>	<u>24.6</u>	<u>\$ 1,930.28</u>		0.000006
6	190,295	<u>1,526</u>	1%	2,247	<u>68%</u>				<u>12.9</u>	<u>13.7</u>	<u>\$ 860.01</u>		0.000005
8	432,412	<u>10,943</u>	3%	35,300	<u>31%</u>				<u>15.5</u>	<u>15.9</u>	<u>\$ 1,066.88</u>		0.000000
9	582,065	<u>6,645</u>	1%	29,730	22%				<u>22.6</u>	<u>21.3</u>	<u>\$ 1,302.37</u>		0.000001
10	329,439	<u>11,610</u>	4%	34,469	<u>34%</u>				<u>29.4</u>	<u>30.1</u>	<u>\$ 1,569.34</u>		0.000001
13	130,527	<u>8,282</u>	6%	25,123	<u>33%</u>				<u>34.7</u>	<u>35.0</u>	<u>\$ 1,451.40</u>		0.000001
14	59,734	<u>2,497</u>	4%	9,068	<u>28%</u>				<u>31.1</u>	<u>32.1</u>	<u>\$ 1,529.11</u>		0.000002
15	93,038	<u>2,110</u>	2%	3,176	66%				<u>24.2</u>	<u>25.1</u>	<u>\$ 1,587.57</u>		0.000004
16	29,157	<u>892</u>	3%	7,439	12%				<u>24.7</u>	<u>25.8</u>	<u>\$ 1,381.44</u>		0.000007
CARB Communities [10]	245,566	<u>9,196</u>	4%	32,811	<u>28%</u>				<u>14.4</u>	<u>14.6</u>	<u>\$ 986.50</u>		0.000005
Financial													
CARE	1,458,614	<u>32,639</u>	2%	90,400	<u>36%</u>				<u>25.8</u>	<u>26.1</u>	<u>\$ 1,388.10</u>		0.000002
Disconnected [2]		<u>8</u>	0%	15	<u>53%</u>				<u>24.7</u>	<u>24.3</u>	<u>\$ 1,642.99</u>		0.011026
Arrearages [11]	691,384	<u>20,733</u>	3%	66,429	<u>31%</u>				<u>23.5</u>	<u>23.8</u>	<u>\$ 1,268.77</u>		0.000002
High Usage [12]	628,004	<u>12,933</u>	2%	47,949	<u>27%</u>				<u>25.0</u>	<u>25.4</u>	<u>\$ 1,422.57</u>		0.000003
High Energy Burden [13]		<u>3,867</u>	0%		0%				<u>24.4</u>	<u>25.0</u>	<u>\$ 1,452.84</u>		0.000002
SEVI [14]													
<25%	519	<u>1</u>	0%	1	100%				66.4	63.5	<u>\$ 2,385.18</u>		0.285348
25%-50%			0%		0%								
50%-75%	1,073,624	<u>20,018</u>	2%	68,409	29%				<u>28.3</u>	<u>28.7</u>	<u>\$ 1,559.01</u>		0.000003
>75%	423,225	<u>15,500</u>	4%	47,759	32%				<u>19.1</u>	<u>19.3</u>	<u>\$ 1,072.92</u>		0.000004
Affordability Ratio [15]													
<25%	1,397,707	<u>33,495</u>	2%	106,736	31%				<u>25.1</u>	<u>25.4</u>	<u>\$ 1,385.30</u>		0.000002
25%-50%	15,030	<u>382</u>	3%	712	<u>54%</u>				<u>11.7</u>	<u>11.7</u>	<u>\$ 705.77</u>		0.000122
50%-75%	1,268	<u>33</u>	3%	483	<u>7%</u>				<u>13.4</u>	<u>10.8</u>	<u>\$ 1,059.81</u>		0.001687
>75%	83,361	<u>1,609</u>	2%	8,238	<u>20%</u>				<u>9.8</u>	<u>10.0</u>	<u>\$ 705.83</u>		0.000020
Health Condition													
Medical Baseline	8,712	<u>1,537</u>	<u>18%</u>	1,197	<u>128%</u>				<u>28.8</u>	<u>29.3</u>	<u>\$ 1,680.56</u>		0.000051
Respiratory [16]													
<25%	247,721	<u>1,367</u>	1%	3,009	45%				<u>28.0</u>	<u>28.3</u>	<u>\$ 1,583.53</u>		0.000069
25%-50%	393,693	<u>6,468</u>	2%	16,959	<u>38%</u>				<u>24.9</u>	<u>25.4</u>	<u>\$ 1,419.15</u>		0.000005
50%-75%	459,431	<u>12,918</u>	3%	43,504	<u>30%</u>				<u>24.0</u>	<u>24.2</u>	<u>\$ 1,354.50</u>		0.000006
>75%	396,521	<u>14,766</u>	4%	52,697	<u>28%</u>				<u>23.9</u>	<u>24.2</u>	<u>\$ 1,286.72</u>		0.000005
Disabled [4]	622,269	<u>6,298</u>	1%		0%				<u>26.0</u>	<u>26.3</u>	<u>\$ 1,513.83</u>		0.000001

* D.21-06-015 permits IOUs to carry forward funds for committed work started in 2025 but finished in 2026. SoCalGas allowed its ESA Program contractors to complete and invoice such committed work by March 27, 2026 (the committed funds period). The amended results for main ESA Program include the committed funds period.

[1] Eligible household counts by segment provided by Athens. Segments with no data may be calculated internally at a later date.

[2] Due to the COVID customer protections, no customers have been disconnected since March 4, 2020.

[3] Senior defined as age 65 and older as self reported during enrollment.

[4] Self identified on application form.

[5] SoCalGas defines Hard to Reach as a customer who either has a language preference other than English or lives in a mobile home or multifamily dwelling unit.

[6] Vulnerable is defined as Disadvantaged Vulnerable Communities (DVC) which consists of communities in the 25% highest scoring census tracts according to the most current versions of the CalEnviroScreen, as well as all California tribal lands, census tracts that score in the highest 5% of Pollution Burden within CalEnviroScreen, but do not receive an overall CalEnviroScreen score due to unreliable public health and socioeconomic data, and census tracts with median household incomes less than 60% of state median income.

[7] As defined by CalEnviroScreen 4.0.

[8] SoCalGas uses geographic boundary information to identify federally recognized tribal areas in conjunction with an augment to the ESA application to allow for customer to self-identify as a member of a tribal community.

[9] Includes Zones 2 and 3 (Tiers 2 and 3) of the CPUC Fire-Threat Map.

[10] Neighborhoods identified by CARB Air Protection Program that overlap with DAC ZIP codes per CalEnviroScreen.

[11] SoCalGas defines arrearages as overdue balance greater than 30 days past due.

[12] SoCalGas defines high usage as at least 200% of baseline for any month within the previous calendar year.

[13] SoCalGas defines High Energy Burden as customers that have to spend 2% or more of household income on their gas bill.

[14] The Socioeconomic Vulnerability Index (SEVI) metric represents the relative socioeconomic standing of census tracts, referred to as communities, in terms of poverty, unemployment, educational attainment, linguistic isolation, and percentage of income spent on housing. SoCalGas utilizes the SEVI data provided by the CPUC to map its service territory by SEVI scores.

[15] Threshold based on CPUC 2019 Annual Affordability Report, utilizing AR20 data.

[16] SoCalGas utilizes the 'Asthmas' indicator in CalEnviroScreen 4.0 (published by the California Office of Environmental Health Hazard Assessment) as a proxy to identify locations with varying levels of respiratory conditions within its service territory.

[17] Households Treated data is not additive because customers may be represented in multiple categories.

[18] Applies to single family homes only.

ESA Multifamily Whole Building

Customer Segments	# of Properties Eligible	# of Properties Treated	Enrollment Rate = (C/B)	# of Properties Contacted	Uptake Rate = (C/E)	Avg. Energy Savings (kWh) Per Treated Property (Energy Saving and HCS Measures)	Avg. Energy Savings (kWh) Per Treated Property (Energy Saving Measures only)	Avg. Peak Demand Savings (kW) Per Treated Property	Avg. Energy Savings (Therms) Per Treated Property (Energy Saving and HCS Measures)	Avg. Energy Savings (Therms) Per Treated Property (Energy Saving Measures only)	Avg. Cost Per Treated Property	Avg. Property Energy Savings (kWh) / Total Annual Energy Use (kWh)	Avg. Property Energy Savings (Therms) / Total Annual Energy Use (Therms)
Demographic													
Housing Type			0%		0%								
SF			0%		0%								
MH			0%		0%								
MF in-Unit			0%		0%								
Rent vs. Own			0%		0%								
Own			0%		0%								
Rent			0%		0%								
Previous vs. New Participant			0%		0%								
Seniors			0%		0%								
Veterans			0%		0%								
Hard-to-Reach			0%		0%								
Location													
DAC		192	0%		0%				797.61		22544.54		
Rural			0%		0%								
Tribal		0	0%		0%								
PSPS Zone		x	0%		0%								
Wildfire Zone		87	0%		0%				727.59		19881.07		
Climate Zone		x	0%		0%								
4													
5													
6													
8													
9													
10													
13													
14			0%		0%								
15			0%		0%								
16			0%		0%								
CARB Communities		37							767.59		23877.22		
Financial													
CARE			0%		0%								
Disconnected			0%		0%								
Arrearages			0%		0%								
High Usage			0%		0%								
Health Condition													
Medical Baseline			0%		0%								
Respiratory			0%		0%								
Disabled													
Other			0%		0%								
Vulnerable [8]													
High Energy Burden [14]		1							6.99		70718		
SEVI [15]		x											
<25%													
25%-50%													
50%-75%		79							1080.88		28490.03		
>75%		91							815.72		22781.36		
Affordability Ratio [16]		x											
<25%		155							1029.8		27035		
25%-50%													
50%-75%													
>75%		15							0		8892.8		
Respiratory (Asthma) [17]													
<25%		13							536.2		16128.73		
25%-50%		39							197.03		16886.97		
50%-75%		67							865.97		21917.52		
>75%		51							1704.8		38962.31		

Note: The MFWB program is implemented by Richard Heath & Associates and SDG&E provides oversight to the detailed process.

ESA Table 16C MFWB (MF In-unit)

Customer Segments	# of Units Eligible [1]	# of Units Treated [2]	Enrollment Rate = (C/B)	# of Units Contacted [3]	Rate of Uptake = (C/E) [19]	Avg. Energy Savings (kWh) Per Treated Unit (Energy Saving and HCS Measures) [4]	Avg. Energy Savings (kWh) Per Treated Unit (Energy Saving Measures only) [5]	Avg. Peak Demand Savings (kW) Per Treated Unit	Avg. Energy Savings (Therms) Per Treated Unit (Energy Saving and HCS Measures) [4]	Avg. Energy Savings (Therms) Per Treated Unit (Energy Saving Measures only) [5]	Avg. Cost Per Treated Unit	Avg. Properties Energy Savings (kWh) / Total Annual Energy Use (kWh)	Avg. Properties Energy Savings (Therms) / Total Annual Energy Use (Therms)
Rent vs. Own													
Own		70							13.48		825.99		
Rent		11849											
Previous vs. New Participant													
New													
Previous													
Seniors [6]		6564							12.30		374.00		
Veterans [18]													
Hard-to-Reach [7]		8548							14.21		416.21		
Vulnerable [8]		8300							14.25		407.76		
Location													
DAC		7910							14.27		406.52		
Rural													
Tribal [20]		1							19.09		531.97		
PSPS Zone													
Wildfire Zone		4849							14.17		422.86		
Climate Zone													
4													
5													
6													
8													
9													
10													
13													
14													
15													
16													
CARB Communities [10]		1921							14.64		390.62		
Financial													
CARE		4350							20.31		628.88		
Disconnected [11]		0											
Arrearages [12]		3861							15.19		444.04		
High Usage [13]		950							17.64		457.20		
High Energy Burden [14]		0											
SEVI [15]													
<25%													
25%-50%													
50%-75%		3822							13.34		447.78		
>75%		4221							14.56		404.27		
Affordability Ratio [16]													
<25%		7452							13.78		423.52		
25%-50%		23							17.80		425.07		
50%-75%													
>75%		568							16.47		443.70		
Health Condition													
Medical Baseline		23							14.95		439.14		
Respiratory (Asthma) [17]													
<25%		642							12.27		479.39		
25%-50%		1831							13.85		493.36		
50%-75%		3085							13.56		395.94		
>75%		2485							15.03		396.48		
Disabled		1515							13.50		399.23		

Note: The MFWB program is implemented by Richard Heath & Associates and SDG&E provides oversight to the detailed process.

ESA Table 16D Pilot Plus and Pilot Deep - SoCalGas and SCE

Customer Segments	# of Households Eligible [1]	# of Households Treated	Enrollment Rate = (C/B)	# of Households Contacted	Rate of Uptake = (C/E)	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving and HCS Measures)	Avg. Energy Savings (kWh) Per Treated Households (Energy Saving Measures only)	Avg. Peak Demand Savings (kW) Per Treated Households	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving and HCS Measures)	Avg. Energy Savings (Therms) Per Treated Households (Energy Saving Measures only)	Avg. Cost Per Treated Households	Avg. HH Energy Savings (kWh) / Total Annual Energy Use (kWh)	Avg. HH Energy Savings (Therms) / Total Annual Energy Use (Therms)
Demographic													
Housing Type													
SF	68,689	142	0%	59,759	0%	3,284	-	0.17	70	-	\$13,817	0.003	
MH	N/A	N/A	0%	N/A	0%	N/A	N/A	N/A	N/A	N/A	N/A	N/A	
MF In-Unit	N/A	N/A	0%	N/A	0%	N/A	N/A	N/A	N/A	N/A	N/A	N/A	
Rent vs. Own [2]													
Own	42,895	107	0%	37,428	0%	3,436	-	0.18	69	-	\$13,984	0.004	
Rent	8,669	35	0%	7,558	0%	2,822	-	0.17	73	-	\$13,305	0.014	
Previous vs. New Participant [3]													
Previous	15,341	36	0%	13,672	0%	3,122	-	0.17	54	-	\$13,198	0.004	
New Participant	53,348	106	0%	46,087	0%	3,340	-	0.17	76	-	\$14,027	0.013	
Seniors	N/A	N/A	0%	N/A	0%	N/A	N/A	N/A	N/A	N/A	N/A	N/A	
Veterans	N/A	N/A	0%	N/A	0%	N/A	N/A	N/A	N/A	N/A	N/A	N/A	
Hard-to-Reach	68,689	142	0%	59,759	0%	3,284	-	0.17	70	-	\$13,817	0.003	
Vulnerable	44,172	3	0%	38,366	0%	7,142	-	0.2	81	-	\$13,643	0.097	
Location													
DAC	27,833	32	0%	23,420	0%	2,430	-	0.18	72	-	\$12,923	0.008	
Rural	11,691	75	1%	10,138	1%	3,722	-	0.18	64	-	\$13,555	0.007	
Tribal	233	1	0%	225	0%	18,766	-	-	32	-	\$8,639	0	
PSPS Zone	10,806	135	1%	9,320	1%	3,288	-	0.17	69	-	\$13,792	0.004	
Climate Zone 06	1,672	0	0%	1,313	0%	-	-	-	-	-	\$-	0	
Climate Zone 08	10,797	0	0%	10,030	0%	-	-	-	-	-	\$-	0	
Climate Zone 09	15,445	0	0%	13,164	0%	-	-	-	-	-	\$-	0	
Climate Zone 10	27,672	141	1%	23,891	1%	3,175	-	0.17	70	-	\$13,854	0.003	
Climate Zone 13	N/A	N/A	0%	N/A	0%	N/A	N/A	N/A	N/A	N/A	N/A	N/A	
Climate Zone 14	9,953	0	0%	8,777	0%	-	-	-	-	-	\$-	0	
Climate Zone 15	1,706	1	0%	1,490	0%	18,766	-	-	32	-	\$8,639	0	
Climate Zone 16	1,050	0	0%	796	0%	-	-	-	-	-	\$-	0	
CARB Communities	7,949	3	0%	7,671	0%	2,496	-	0.27	41	-	\$15,224	0.135	
Financial													
CARE	68,689	142	0%	59,759	0%	3,284	-	0.17	70	-	\$13,817	0	
FERA	N/A	N/A	0%	N/A	0%	N/A	N/A	N/A	N/A	N/A	N/A	N/A	
Disconnected	530	0	0%	504	0%	-	-	-	-	-	\$-	0	
Arrearages	48,016	99	0%	45,311	0%	3,529	-	0.16	73	-	\$14,516	0.01	
High Usage	68,689	142	0%	59,759	0%	3,284	-	0.17	70	-	\$13,817	0	
High Energy Burden	22,556	40	0%	28,359	0%	3,983	-	0.15	60	-	\$13,268.58	0	
SEVI [4]													
Low	10,245	18	0%	8,978	0%	3,661	-	0.17	67	-	\$14,619	0.04	
Medium	32,436	77	0%	28,217	0%	3,360	-	0.17	61	-	\$13,266	0.01	
High	25,942	47	0%	23,279	0%	3,017	-	0.18	87	-	\$14,412	0.01	
Affordability Ratio	53,796	32	0%	50,955	0%	3,923	-	0.17	64	-	\$13,357	0.01	
Health Condition													
Medical Baseline	1,275	4	0%	1,178	0%	4,144	-	0.184	41.38	-	\$12,371	0.11	
Respiratory													
Low	N/A	N/A	0%	N/A	0%	N/A	N/A	N/A	N/A	N/A	N/A	N/A	
Medium	N/A	N/A	0%	N/A	0%	N/A	N/A	N/A	N/A	N/A	N/A	N/A	
High	N/A	N/A	0%	N/A	0%	N/A	N/A	N/A	N/A	N/A	N/A	N/A	
Disabled	N/A	N/A	0%	N/A	0%	N/A	N/A	N/A	N/A	N/A	N/A	N/A	

^[1] Based on entire Program Customer List

^[2] Homes with missing Rent vs Own data is not included in the total homes treated

^[3] Previous (ESA Enrolled / ESA Treated) vs New (Not ESA Enrolled)

^[4] Homes with missing SEVI data is not included in the total homes treated

	A	B	C	D	E	F	G	H
1	PY 2025 Low Income Programs Annual Report							
2	CARE Table 1							
3	Overall Program Expenses							
4	SOUTHERN CALIFORNIA GAS COMPANY							
5	Category	Overall Expenditures		Total	Authorized Budget 1	% of Budget Spent	Total Shifted	Shifted to/from/Other Comments
6		Electric	Gas					
7	Outreach	N/A	\$ 3,629,741	\$ 3,629,741	\$ 4,604,267	79%	\$ (31,058)	Authorized funds shifted to CHANGES
8	Processing, Certification, Recertification	N/A	\$ 1,378,022	\$ 1,378,022	\$ 2,354,471	59%		
9	Post Enrollment Verification	N/A	\$ 176,958	\$ 176,958	\$ 261,652	68%		
10	IT Programming	N/A	\$ 1,033,175	\$ 1,033,175	\$ 1,144,150	90%		
11	Pilots	N/A	\$ (5,782)	\$ (5,782)	\$ -	N/A		
12	CHANGES	N/A	\$ 437,502	\$ 437,502	\$ 437,502	100%	\$ 31,058	Authorized funds shifted from Outreach
13	Studies	N/A	\$ 31,776	\$ 31,776	\$ 62,500	51%		
14	Regulatory Compliance	N/A	\$ 357,866	\$ 357,866	\$ 624,391	57%		
15	General Administration	N/A	\$ 1,099,590	\$ 1,099,590	\$ 1,200,786	92%		
16	CPUC Energy Division	N/A	\$ 11,279	\$ 11,279	\$ 84,413	13%		
17								
18	TOTAL Program Costs	N/A	\$ 8,150,127	\$ 8,150,127	\$ 10,774,132	76%		
19								
20	CARE Rate Discount	N/A	\$ 194,028,869	\$ 194,028,869	\$ 139,795,171	139%		
21	Service Establishment Charge Discount	N/A	\$ 2,382,240	\$ 2,382,240	\$ 3,469,810	69%		
22								
23	TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	N/A	\$ 204,561,236	\$ 204,561,236	\$ 154,039,113	133%	\$ -	
24								
25	¹ Reflects Jan-Dec 2025 authorized funding per D. 21-06-015 dated June 3, 2021.							

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	
1	PY 2025 Low Income Programs Annual Report																												
2	CARE Table 2																												
3	Enrollment, Recertification, Attrition, & Penetration																												
4	SOUTHERN CALIFORNIA GAS COMPANY																												
5		New Enrollment										Recertification				Attrition (Drop Offs)					Enrollment		Total CARE Participants by Dwelling Type⁵			Total CARE Participants	Estimated CARE Eligible	Enrollment Rate % (Z/AA)	
6		Automatic Enrollment				Self-Certification (Income or Categorical)						Total New Enrollment (E+J)	Scheduled	Non-Scheduled (Duplicates)	Automatic	Total Recertification (L+M+N)	No Response⁴	Failed PEV	Failed Recertification	Other	Total Attrition (P+Q+R+S)	Gross (K+O)	Net Adjusted (K-T)	SF	MF				MH
7		Inter-Utility¹	Intra-Utility²	Leveraging³	Combined (B+C+D)	Online	Paper	Phone	Capitation	Combined (F+G+H+I)																			
8	January	4,029	1,337	66	5,432	9,626	1,764	10,670	0	22,060	27,492	4860	37,477	10830	53,167	14646	283	465	10,006	25,400	80,659	2,092	1,100,288	633,087	24,848	1,758,224	1,589,476	111%	
9	February	2,515	1,205	49	3,769	9,615	2,329	10,782	0	22,726	26,495	3757	23,830	7827	35,414	13449	430	399	10,509	24,787	61,909	1,708	1,101,674	633,310	24,935	1,759,932	1,589,476	111%	
10	March	2,460	1,662	59	4,181	9,976	2,439	11,632	0	24,047	28,228	4330	27,929	18186	50,445	10925	407	364	10,752	22,448	78,673	5,780	1,105,818	634,878	25,015	1,765,712	1,589,476	111%	
11	April	3,211	1,371	54	4,636	9,251	1,952	11,638	0	22,841	27,477	4171	21,339	12231	37,741	9728	347	340	10,613	21,028	65,218	6,449	1,110,621	636,629	24,910	1,772,161	1,587,935	112%	
12	May	2,361	1,477	40	3,878	6,281	2,283	9,661	1	18,226	22,104	9405	33,256	10071	52,732	11411	331	421	10,705	22,868	74,836	-764	1,110,759	635,874	24,761	1,771,397	1,587,935	112%	
13	June	2,520	1,329	37	3,886	6,001	1,719	8,625	0	16,345	20,231	5167	36,143	10610	51,920	13098	363	438	11,388	25,287	72,151	-5,056	1,108,239	633,677	24,402	1,766,341	1,587,935	111%	
14	July	2,819	1,551	61	4,431	6,038	1,943	9,158	1	17,140	21,571	5511	30,910	9,939	46,360	15192	339	391	12,479	28,401	67,931	-6,830	1,104,886	630,358	24,264	1,759,511	1,587,269	111%	
15	August	2,344	1,615	59	4,018	6,224	2,639	9,860	0	18,723	22,741	5,971	38,049	11,464	55,484	14847	447	374	12,680	28,348	78,225	-5,607	1,100,909	628,833	24,159	1,753,904	1,587,269	110%	
16	September	5,375	1,526	29	6,930	5,952	2,506	9,876	0	18,334	25,264	6,166	54,515	17,155	77,836	14591	5588	447	7,329	27,955	103,100	-2,691	1,100,188	627,076	23,946	1,751,213	1,587,269	110%	
17	October	4,373	1,379	45	5,797	5,750	1,159	8,673	0	15,582	21,379	9,009	29,508	17,704	56,221	12,902	516	492	11,177	25,087	77,600	-3,708	1,099,391	624,337	23,733	1,747,505	1,586,607	110%	
18	November	1,841	1,489	63	3,393	5,471	681	8,774	1	14,927	18,320	7,286	24,316	11,906	43,508	14,446	566	572	11,466	27,050	61,828	-8,730	1,095,244	619,885	23,644	1,738,775	1,586,607	110%	
19	December	1,658	1,611	28	3,297	5,951	612	9,118	1	15,682	18,979	8,017	24,316	17,864	50,197	16,217	618	538	10,781	28,154	69,176	-9,175	1,090,921	615,156	23,521	1,729,600	1,586,607	109%	
20	YTD Total	35,506	17,552	590	53,648	86,136	22,026	118,467	4	226,633	280,281	73,650	381,588	155,787	611,025	161,452	10,235	5,241	129,885	306,813	891,306	-26,532	1,090,921	615,156	23,521	1,729,600	1,586,607	109%	
21																													
22	¹ Enrollments via data sharing between the IOUs.																												
23	² Enrollments via data sharing between departments and/or programs within the utility.																												
24	³ Enrollments via data sharing with programs outside the IOU that serve low-income customers.																												
25	⁴ No response includes no response to both Recertification and Verification.																												
26	⁵ Dwelling Type defined as structural configuration only. MF includes 2 or more separate dwellings/units per lot, 2-4 connected dwellings/units per lot, or 5 or more connected dwellings/units per lot. CARE meter configuration must be individually metered or submetered.																												

PY 2025 Low Income Programs Annual Report
CARE Table 3
Post-Enrollment Verification Results (Model)
SOUTHERN CALIFORNIA GAS COMPANY

Month	Total CARE Households Enrolled	Households Requested to Verify ¹	% of CARE Enrolled Requested to Verify Total	% of Scheduled Customers not Responsive to the PEV Process	% of Scheduled PEV Customers later verified as Income Eligible ⁵	CARE Households De-enrolled (Due to no response)	CARE Households De-enrolled (Verified as Ineligible) ²	Total Households De-enrolled ³	% De-enrolled through Post Enrollment Verification ⁴	% of Total CARE Households De-enrolled
January	1,758,224	8,568	0.49%	62.23%	26.34%	5,332	755	6,087	71.04%	0.35%
February	1,759,932	6,869	0.39%	67.26%	25.05%	4,620	504	5,124	74.60%	0.29%
March	1,765,712	7,677	0.43%	67.64%	24.79%	5,193	541	5,734	74.69%	0.32%
April	1,772,161	6,202	0.35%	66.45%	25.86%	4,121	370	4,491	72.41%	0.25%
May	1,771,397	7,671	0.43%	66.54%	26.31%	5,104	525	5,629	73.38%	0.32%
June	1,766,341	9,267	0.52%	63.39%	29.32%	5,874	657	6,531	70.48%	0.37%
July	1,759,511	10,154	0.58%	65.27%	27.09%	6,628	751	7,379	72.67%	0.42%
August	1,753,904	8,826	0.50%	65.86%	27.32%	5,813	566	6,379	72.28%	0.36%
September	1,751,213	14,836	0.85%	74.50%	20.05%	11,053	783	11,836	79.78%	0.68%
October	1,747,505	16,894	0.97%	70.47%	22.64%	11,906	1,190	13,096	77.52%	0.75%
November	1,738,775	8,554	0.49%	62.71%	28.22%	5,364	766	6,130	71.66%	0.35%
December	1,729,600	11,024	0.64%	46.46%	27.06%	5,122	965	6,087	55.22%	0.35%
Total	1,729,600	116,542	6.74%	65.32%	25.38%	76,130	8,373	84,503	72.51%	4.89%

¹ Includes all customers who failed SoCalGas' CARE eligibility probability model.

² Includes customers verified as over income or who requested to be de-enrolled.

³ Verification results are tied to the month initiated and the verification process allows customers 90 days (3 or 4 bill cycles) to respond to the verification request. Results may be pending due to the time permitted for a participant to respond.

⁴ Percentage of customers dropped compared to the total participants requested to provide verification in that month.

⁵ Includes Income Eligible only. Excludes Categorical and Categorical plus Income Eligible.

CARE Table 3 Post-Enrollment Verification Results (Electric only High Usage)

PY 2025

Month	Total CARE Households Enrolled	Households Requested to Verify ¹	% of CARE Enrolled Requested to Verify Total	% of Scheduled Customers not Responsive to the PEV Process	% of Scheduled PEV Customers later verified as Income Eligible	CARE Households De-enrolled (Due to no response)	CARE Households De-enrolled (Verified as Ineligible) ²	Total Households De-enrolled ³	% De-enrolled through HUV Post Enrollment Verification	% of Total CARE Households De-enrolled
January										
February										
March										
April										
May										
June										
July										
August										
September										
October										
November										
December										
YTD Total	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

¹ Includes all participants who were selected for high usage verification process.

² Includes customers verified as over income, who requested to be de-enrolled, did not reduce usage, or did not agree to be weatherized.

³ Medium (400%) and high usage (600%) customers are dropped at 60 days (2 or 3 bill cycles) for non-response to HUV (high usage income verification request). Additionally, 600% + users that have not reduced usage within the 60 day window (2 or 3 bill cycles) are removed from the program. Results may be pending due to the time permitted for a participant to respond.

PY 2025 Low Income Programs Annual Report
CARE Table 3 A-B
Post-Enrollment Verification Re-Enrollment Rates
SOUTHERN CALIFORNIA GAS COMPANY

CARE Table 3A - Post-Enrollment Verification Re-Enrollment Rates (Model) - 2025

Month Removed	Total Customers Removed	Re-Enrolled by 6 Months	6 Month Re-Enrollment Rate	Re-Enrolled by 12 Months	12 Month Re-Enrollment Rate (%)
Jan-25	1,751	155	8.85%	23	1.31%
Feb-25	1,644	144	8.76%	29	1.76%
Mar-25	1,624	134	8.25%	40	2.46%
Apr-25	2,495	115	4.61%	20	0.80%
May-25	4,325	82	1.90%	14	0.32%
Jun-25	2,408	29	1.20%	14	0.58%
Jul-25	1,667	25	1.50%	10	0.60%
Aug-25	1,683	38	2.26%	21	1.25%
Sep-25	1,576	43	2.73%	25	1.59%
Oct-25	1,725	83	4.81%	36	2.09%
Nov-25	2,534	72	2.84%	34	1.34%
Dec-25	3,636	99	2.72%	29	0.80%
Average			4.20%		1.24%

CARE Table 3B - Post-Enrollment Verification Re-Enrollment Rates (High Usage) - 2025

N/A for SoCalGas

Month Removed	Total Customers Removed	Re-Enrolled by 6 Months	6 Month Re-Enrollment Rate	Re-Enrolled by 12 Months	12 Month Re-Enrollment Rate (%)
Jan-25					
Feb-25					
Mar-25					
Apr-25					
May-25					
Jun-25					
Jul-25					
Aug-25					
Sep-25					
Oct-25					
Nov-25					
Dec-25					

	A	B	C	D	E	F	G
1	PY 2025 Low Income Programs Annual Report						
2	CARE Table 4						
3	CARE Self-Certification and Self-Recertification Applications ¹						
4	SOUTHERN CALIFORNIA GAS COMPANY						
5		Provided ²	Received	Approved ³	Denied ⁴	Pending/Never Completed ⁵	Duplicates ⁶
6	Total (Y-T-D)	2,748,940	527,859	426,689	59,897	27,022	14,251
7	Percentage		100.00%	80.83%	11.35%	5.12%	2.70%
8							
9	¹ Includes sub-metered customers.						
10	² An estimated number that includes customers whom were provided with CARE self-certification and self-recertification application via direct mail, email, phone, bill insert, door-to-door delivery, utility personnel, and through outreach events.						
11	³ Approved includes customers who are approved through mail-in, via web, by phone, and through duplicated applications.						
12	⁴ Customers are denied due to not being CARE eligible, not customer of record, or not the customer's primary residence.						
13	⁵ Pending/Never Completed includes opt-outs, closed accounts, incomplete applications, and customers of other utilities who are not SoCalGas customers.						
14	⁶ Duplicates are customers who are already enrolled in CARE and mail in another CARE application. SoCalGas treats them as recertification applications.						

	A	B	C	D	E	F	G	H	I	J
1	PY 2025 Low Income Programs Annual Report									
2	CARE Table 5									
3	CARE Enrollment by County									
4	SOUTHERN CALIFORNIA GAS COMPANY									
5	County	Estimated Eligible			Total Participants			Enrollment Rate		
6		Urban	Rural ¹	Total	Urban	Rural	Total	Urban	Rural	Total
7	Fresno	10,314	11	10,325	12,223	21	12,244	119%	185%	119%
8	Imperial	0	17,382	17,382	5	15,402	15,407	n/a	89%	89%
9	Kern	14,540	27,782	42,322	17,593	32,176	49,769	121%	116%	118%
10	Kings	11	14,050	14,061	7	16,730	16,737	63%	119%	119%
11	Los Angeles	801,897	2,649	804,546	855,027	2,116	857,143	107%	80%	107%
12	Orange	185,479	0	185,479	178,518	29	178,547	96%	#DIV/0!	96%
13	Riverside	95,692	114,044	209,736	105,759	133,970	239,729	111%	117%	114%
14	San Bernardino	141,347	869	142,216	187,983	681	188,664	133%	78%	133%
15	San Luis Obispo	8,268	14,508	22,776	3,983	11,459	15,442	48%	79%	68%
16	Santa Barbara	32,760	797	33,557	30,774	683	31,457	94%	86%	94%
17	Tulare	10,261	40,666	50,926	13,361	56,092	69,453	130%	138%	136%
18	Ventura	51,004	2,276	53,281	53,066	1,942	55,008	104%	85%	103%
19	Total	1,351,573	235,035	1,586,607	1,458,299	271,301	1,729,600	108%	115%	109%
20										
21	¹ Rural includes zip codes classified as such according to the Goldsmith modification that was developed to identify small towns and rural areas within large metropolitan counties.									

	A	B	C	D	E	F	G	H
1	PY 2025 Low Income Programs Annual Report							
2	CARE Table 6							
3	CARE Recertification Results							
4	SOUTHERN CALIFORNIA GAS COMPANY							
5		Total CARE Households	Households Requested to Recertify¹	% of Households Total (C/B)	Households Recertified²	Households De-enrolled³	Recertification Rate %⁴ (E/C)	% of Total Households De-enrolled (F/B)
6	January	1,758,224	23,729	1.35%	14,929	8,504	63%	0.48%
7	February	1,759,932	14,628	0.83%	8,832	6,133	60%	0.35%
8	March	1,765,712	29,722	1.68%	17,523	13,565	59%	0.77%
9	April	1,772,161	35,083	1.98%	26,661	13,002	76%	0.73%
10	May	1,771,397	23,380	1.32%	15,826	9,213	68%	0.52%
11	June	1,766,341	22,268	1.26%	13,665	9,396	61%	0.53%
12	July	1,759,511	21,830	1.24%	14,126	8,560	65%	0.49%
13	August	1,753,904	30,083	1.72%	20,131	11,308	67%	0.64%
14	September	1,751,213	35,465	2.03%	24,009	12,366	68%	0.71%
15	October	1,747,505	35,492	2.03%	23,492	12,526	66%	0.72%
16	November	1,738,775	25,464	1.46%	16,802	9,226	66%	0.53%
17	December	1,729,600	31,302	1.81%	20,288	8,756	65%	0.51%
18	Total	1,729,600	328,446	18.99%	216,284	122,555	65.85%	7.09%
19								
20	¹ Excludes count of customers recertified through the probability model.							
21	² Recertification results are tied to the month initiated and the recertification process allows customers 90 days (3 or 4 bill cycles) to respond to the recertification request. Results may be pending due to the time permitted for a participant to respond.							
22	³ Includes customers who did not respond or who requested to be de-enrolled.							
23	⁴ Percentage of customers recertified compared to the total participants requested to recertify in that month.							

	A	B	C	D	E	F	G	H	I
1	PY 2025 Low Income Programs Annual Report								
2	CARE Table 7								
3	CARE Capitation Contractors								
4	SOUTHERN CALIFORNIA GAS COMPANY								
5	Contractor Name ¹	Contractor Type (Check one or more if applicable)				Enrollments ²			Total Expenditures
6		Private	CBO	WMDVBE	LIHEAP	Rural	Urban	Total	
7	Community Action Partnership of Orange County		X	X	X				
8	Sigma Beta Xi		X						
9	PACE – Pacific Asian Consortium in Employment		X	X	X				
10	Community Pantry of Hemet		X						
11	Community Action Partnership of San Bernardino		X		X				
12	LA Works		X						
13	Children’s Hospital of Orange County		X						
14	LACDA		X						
15	YMCA Montebello-Commerce		X						
16	Sr. Citizens Emergency Fund I.V., Inc.		X						
17	Coachella Valley Housing Coalition		X						
18	HABBM		X						
19	Southeast Community Development Corp.		X						
20	Latino Resource Organization		X						
21	Community Action Partnership - Kern County		X						
22	Ventura Cty Comm Human		X						
23	Blessed Sacrament Church		X						
24	Hernandad Mexicana		X						
25	CSET		X						
26	Crest Forest Family and Community Service		X						
27	CUI – Campesinos Unidos, Inc.		X	X	X				
28	Veterans in Community Service		X	X	X				
29	MEND		X						
30	Catholic Charities of LA – Brownson House		X						
31	OCCC, Inc. (Orange County Community Center)		X						
32	Green Light Shipping	X							
33	APAC Service Center		X			4		4	\$ 120
34	Visalia Emergency Aid Council		X						
35	Total Enrollments and Expenditures					4	0	4	\$ 120
36									
37	¹ All capitation contractors with current contracts are listed regardless of whether they have signed up customers or submitted invoices this year.								
38	² Enrollments reflect new enrollments only.								

	A	B	C	D	E	F	G	H	I
1	PY 2025 Low Income Programs Annual Report CARE Table 8 CARE Participants as of Month-End SOUTHERN CALIFORNIA GAS COMPANY								
2									
3									
4									
5		Gas and Electric	Gas Only	Electric Only	Total	Eligible Households	Enrollment Rate	% Change ^{1,2}	Total Residential Accounts
6	January	N/A	1,758,224	N/A	1,758,224	1,589,476	111%	0.12%	5,783,253
7	February	N/A	1,759,932	N/A	1,759,932	1,589,476	111%	0.10%	5,776,141
8	March	N/A	1,765,712	N/A	1,765,712	1,589,476	111%	0.33%	5,776,192
9	April	N/A	1,772,161	N/A	1,772,161	1,587,935	112%	0.36%	5,778,319
10	May	N/A	1,771,397	N/A	1,771,397	1,587,935	112%	-0.04%	5,779,715
11	June	N/A	1,766,341	N/A	1,766,341	1,587,935	111%	-0.29%	5,778,753
12	July	N/A	1,759,511	N/A	1,759,511	1,587,269	111%	-0.39%	5,776,035
13	August	N/A	1,753,904	N/A	1,753,904	1,587,269	110%	-0.32%	5,774,947
14	September	N/A	1,751,213	N/A	1,751,213	1,587,269	110%	-0.15%	5,756,421
15	October	N/A	1,747,505	N/A	1,747,505	1,586,607	110%	-0.21%	5,773,987
16	November	N/A	1,738,775	N/A	1,738,775	1,586,607	110%	-0.50%	5,773,172
17	December	N/A	1,729,600	N/A	1,729,600	1,586,607	109%	-0.53%	5,774,501
18									
19	¹ Explain any monthly variance of 5% or more in the number of participants.								
20	² The SoCalGas population did not vary by a level of 5% or more in any month during 2025.								

	A	B	C	D
1	PY 2025 Low Income Programs Annual Report CARE Table 9 CARE Average Monthly Usage & Bill SOUTHERN CALIFORNIA GAS COMPANY			
2				
3				
4				
5	Average Monthly Gas / Electric Usage			
6	Residential Non-CARE vs. CARE Customers			
7	Customer	Gas Therms	Gas Therms	Total
8		Tier 1	Tier 2	
9	Non-CARE	20.40	9.75	30.15
10	CARE	17.47	6.69	24.16
11	Customer	Electric KWh	Electric KWh	Total
12		Tier 1	Tier 2 and Above	
13	Non-CARE	N/A	N/A	N/A
14	CARE	N/A	N/A	N/A
15				
16				
17	Average Monthly Gas / Electric Bill			
18	Residential Non-CARE vs. CARE Customers¹			
19	(Dollars per Customer)			
20	Customer	Gas	Electric	
21	Non-CARE	\$59.10	N/A	
22	CARE	\$46.88	N/A	
23				
24	¹ Excludes master-meter usage.			

	A	B	C	D	E	F
1	PY 2025 Low Income Programs Annual Report					
2	CARE Table 10					
3	CARE Surcharge & Revenue					
4	SOUTHERN CALIFORNIA GAS COMPANY					
5						
6	ELECTRIC					
7	CARE Surcharge and Revenue Collected by Customer Class					
8	Class	CARE Surcharge	Monthly Bill	Bill	Collected	Revenue Collected
9	Residential	N/A	N/A	N/A	N/A	N/A
10	Commercial	N/A	N/A	N/A	N/A	N/A
11	Agricultural	N/A	N/A	N/A	N/A	N/A
12	Large/Indust	N/A	N/A	N/A	N/A	N/A
13						
14						
15						
16	GAS					
17	CARE Surcharge and Revenue Collected by Customer Class					
18	Customer	Average Monthly		CARE Surcharge as Percent of Bill	Total CARE Surcharge Collected	Percentage of CARE Surcharge Revenue Collected
19		CARE Surcharge¹	Monthly Bill			
20	Class					
21	Residential	\$1.30	\$59.10	2.20%	\$63,173,646	41.53%
22	Commercial	\$17.92	\$523.29	3.42%	\$39,775,433	26.15%
23	Natural Gas Vehicle	\$1,465.14	\$20,423.85	7.17%	\$8,215,041	5.40%
24	Industrial	\$240.47	\$2,073.13	11.60%	\$40,951,032	26.92%
25						
26	¹ Excludes CARE customers.					

	A	B	C	D	E	F
1	PY 2025 Low Income Programs Annual Report					
2	CARE Table 11					
3	CARE Capitation Applications ¹					
4	SOUTHERN CALIFORNIA GAS COMPANY					
5	Entity	Total Received	Approved ²	Denied	Pending/ Never Completed	Duplicate
6	Orange County CDC	0	0	0	0	0
7	Sigma Beta Xi	0	0	0	0	0
8	PACE-PacAsianConEmploy	0	0	0	0	0
9	Cmty Pantry of Hemet	0	0	0	0	0
10	Cmty Svcs SBDO County	0	0	0	0	0
11	LA Works	0	0	0	0	0
12	Childrens Hospital of OC	0	0	0	0	0
13	LA County Development Authority	0	0	0	0	0
14	YMCA Montebello-Commerce	0	0	0	0	0
15	Sr Citizen Emergency Fund	0	0	0	0	0
16	Coachella Valley Housing Coalition	0	0	0	0	0
17	HABBM	0	0	0	0	0
18	SoEast Comm Dev Corp	0	0	0	0	0
19	Latino Resrce Organizatn	0	0	0	0	0
20	Community Action Partnership - Kern County	0	0	0	0	0
21	Ventura Cty Comm Human	0	0	0	0	0
22	Blessed Sacrament Church	0	0	0	0	0
23	Hernandad Mexicana	0	0	0	0	0
24	CSET	0	0	0	0	0
25	Crest Forest Family Cmty	0	0	0	0	0
26	Campesinos Unidos, Inc.	0	0	0	0	0
27	Veterans in Community Service	0	0	0	0	0
28	Meet Ea Need W / Dignity	0	0	0	0	0
29	Cath Char Bronson House	0	0	0	0	0
30	Orange County Comm Ctr (OCCC)	0	0	0	0	0
31	Green Light Shipping	0	0	0	0	0
32	Apac Service Center	4	4	0	0	0
33	Visalia Emergency Aid Council	0	0	0	0	0
34	Total	4	4	0	0	0
35						
36	¹ Includes sub-metered customers.					
37	² Includes new enrollments and recertification applications approved.					

	A	B	C	D	E	F	G
1	PY 2025 Low Income Programs Annual Report						
2	CARE Table 12						
3	CARE Expansion Program						
4	SOUTHERN CALIFORNIA GAS COMPANY						
5							
6	Participating Facilities by Month						
7	2025	Gas			Electric		
8		CARE Residential Facilities	CARE Commercial Facilities	Total Gas	CARE Residential Facilities	CARE Commercial Facilities	Total Electric
9	January	125	1,994	2,119	N/A	N/A	N/A
10	February	125	1,995	2,120	N/A	N/A	N/A
11	March	125	1,995	2,120	N/A	N/A	N/A
12	April	125	1,990	2,115	N/A	N/A	N/A
13	May	125	1,988	2,113	N/A	N/A	N/A
14	June	125	2,019	2,144	N/A	N/A	N/A
15	July	125	1,832	1,957	N/A	N/A	N/A
16	August	125	1,861	1,986	N/A	N/A	N/A
17	September	125	1,866	1,991	N/A	N/A	N/A
18	October	125	1,891	2,016	N/A	N/A	N/A
19	November	125	1,890	2,015	N/A	N/A	N/A
20	December	125	1,892	2,017	N/A	N/A	N/A
21							
22							
23	Average Monthly Gas / Electric Usage¹						
24	Customer	Gas		Electric			
25		Therms		KWh			
26	Residential Facilities	24.17		N/A			
27	Commercial Facilities	236.30		N/A			
28							
29							
30	CARE Expansion Self-Certification and Self-Recertification Applications						
31		Received	Approved	Denied	Pending/Never Completed	Duplicates	
32	Total	511	498	3	10	0	
33	Percentage		97.5%	0.6%	2.0%	0.0%	
34							
35	¹ Excludes master meter usage.						

	A	B	C	D	E	F	G	H	I	J
1	PY 2025 Low Income Programs Annual Report CARE Table 13 CARE High Usage Verification Results ⁵ SOUTHERN CALIFORNIA GAS COMPANY									
2										
3										
4										
5	Stage 1 - IRS Documentation and ESA Agreement				Stage 2 - ESA Participation			Stage 3 - Usage Monitoring		
6	Households Requested to Verify	Removed (No Response)	Removed (Verified Ineligible) ¹	Income Verified and Referred to ESA	Failed and Removed ²	Ineligible ³	Completed	Removed ⁴	Appeals Denied	Appeals Approved
7	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
8										
9	¹ Includes customers who were verified as over income, requested to be removed, or did not agree to participate in ESA Program.									
10	² Includes customers who declined to participate in ESA Program, failed to respond to appointment requests, or missed multiple appointments or denied access to all rooms.									
11	³ Includes customers who previously participated in ESA Program, did not meet the three-measure minimum, landlord refused, etc. These customers move directly to Stage 3.									
12	⁴ Customers removed for exceeding 600% of baseline in any monthly billing cycle.									
13	⁵ High usage is defined as a customer that exceeds 400% or 600% of baseline.									

PY 2025 Low Income Programs Annual Report

CARE Table 14

CARE Customer Usage and ESA Program Treatment

# of CARE customers at or above 90th Percentile of Usage Not subject to High Usage PEV ¹	Percent of those CARE customers Not served by ESA Program ²	# of Enrollments led to ESA Program measure Installations	# of Long-Term tenancy CARE customers who have Not applied for ESA Program	Energy Usage of Long-Term Tenancy CARE Customers who Accept ESA Program Treatment				Energy Usage of CARE customers who do Not accept ESA Program treatment
				Energy Usage before ESA Program treatment	Energy Usage within 3-months of ESA Program treatment	Energy Usage within 6-months of ESA Program treatment	Energy Usage within 12-months of ESA Program treatment	
N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

¹ Those CARE customers who have been on CARE reate at the same meter for a least six years.

² Those CARE customers who have not participated in the ESA Program prior to receiving targeted marketing.

	A	B
1	PY 2025 Low Income Programs Annual Report	
2	CARE Table 15	
3	Categorical Enrollment	
4	SOUTHERN CALIFORNIA GAS COMPANY	
5	Type of Enrollment	Number of Customer Enrollments ¹
6	Bureau of Indian Affairs General Assistance	67
7	CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	61,074
8	CalWORKs/Temporary Assistance for Needy Families (TANF) ²	10,307
9	Head Start Income Eligible - (Tribal Only)	194
10	Healthy Families A&B	17,046
11	Low-income Home Energy Assistance Program (LIHEAP)	3,502
12	Medicaid/Medi-Cal	98,097
13	National School Lunch Program (NSLP) - Free Lunch	11,216
14	Supplemental Security Income (SSI)	10,940
15	Tribal TANF ²	0
16	Women, Infants, and Children Program (WIC)	18,910
17	¹ Number of customers enrolled reflects categorical programs selected by customer. Customers may select more than one eligible program for a single account. ² CalWORKS and Tribal TANF are combined categorical programs with no distinction between the two programs.	
18		
19		

PY 2025 Low Income Programs Annual Report
CARE Table 16
CARE and Disadvantage Communities Enrollment Rate for Zip Codes
SOUTHERN CALIFORNIA GAS COMPANY

Total CARE Households Enrolled

Month	CARE Enrollment Rate for ZIP Codes That Have 10% or More Disconnections	CARE Enrollment Rate for ZIP Codes in High Poverty (Income Less than 100% FPG)	CARE Enrollment Rate for ZIP Codes in High Poverty (with 70% or Less CARE Penetration)	CARE Enrollment Rate for DAC (ZIP/Census Tract) Codes in High Poverty (with 70% or Less CARE Enrollment Rate)
January	N/A	101.8%	52.2%	46.8%
February	N/A	101.8%	52.9%	47.0%
March	N/A	102.0%	53.1%	46.7%
April	N/A	102.7%	49.8%	46.4%
May	N/A	102.7%	50.1%	46.4%
June	N/A	102.1%	54.0%	45.9%
July	N/A	101.9%	53.5%	45.5%
August	N/A	99.5%	49.8%	45.2%
September	N/A	99.2%	48.9%	45.1%
October	N/A	98.8%	49.4%	46.3%
November	N/A	98.8%	49.3%	45.8%
December	N/A	97.1%	52.4%	45.6%
YTD	N/A	100.7%	51.3%	46.1%

Notes:

Penetration Rate and Enrollment Rate are the same value.
DACs are defined at the census tract level. Corresponding zip codes are provided for the purpose of this table; however, the entire zip code listed may not be considered a DAC.