

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

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

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

**SOUTHERN CALIFORNIA GAS COMPANY (U 904 G)
ENERGY EFFICIENCY PROGRAMS 2020 ANNUAL REPORT**

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Southern California Gas Company (SoCalGas) submits its 2020 Annual Report for energy efficiency programs and accomplishments. The Annual Report is prepared in accordance with the Administrative Law Judge’s Ruling Adopting Annual Reporting Requirements for Energy Efficiency and Addressing Related Reporting Issues (August 8, 2007),¹ and Decision (D.) 18-01-001 and 18-05-041. The Ruling requires “each utility to file its annual report on May 1 of the year following the end of a given program year.”² Pursuant to Ordering Paragraph (OP) 8 of D.18-01-004, the dollar amounts of third-party contracts (provided in aggregate) are included in Appendix C. As directed by the Commission, particular contract dollar amounts will be provided confidentially to the Commission. Additional detail regarding third-party programs and statewide programs directed by the Commission is provided in Appendix C.³ Pursuant to OP 11 of D.18-05-041, SoCalGas’ progress towards metrics and indicators are typically available on the California Public Utilities Commission’s Energy Efficiency Statistics Application (EESTATs) website.⁴

¹ Per the Ruling, issued in Rulemaking 06-04-010, filing and serving the Annual Report would apply to successor proceedings, which includes this docket. See Ruling, p. 4 (OP 2).

² *Id.* The attached Annual Report completely supersedes the version which was served on May 1, 2018.

³ OP 17 of D.18-05-041 directed the investor-owned utilities (IOUs) to track the number and proportion of third parties that forego the option of using utility account representatives. Conclusion of Law 19 directed the IOUs to develop an agreed-upon annual report to facilitate ongoing statewide program funding-level management.

⁴ Available at <http://eestats.cpuc.ca.gov/Views/Documents.aspx>; EESTATs is currently unavailable. Data on SoCalGas’ progress towards metrics and indicators in 2020 can be found on the CPUC’s Energy Efficiency Reporting website at <https://www.cpuc.ca.gov/general.aspx?id=6442468251>.

ATTACHMENT

**SOUTHERN CALIFORNIA GAS
COMPANY**

**ENERGY EFFICIENCY PROGRAMS
ANNUAL REPORT**

2020 RESULTS



A  Sempra Energy utility

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2020 ENERGY EFFICIENCY PROGRAM PORTFOLIO SUMMARY

Executive Summary

At Southern California Gas Company (SoCalGas), sustainability and environmental stewardship are fundamental elements of doing business. SoCalGas actively works to reduce the environmental impact of our operational practices and assists customers in reducing their impact by showing them how to use energy more efficiently. SoCalGas accomplishes this by offering a comprehensive suite of energy efficiency (EE) programs, strategies, and solutions to meet the dynamic energy needs of our customers. In 2020, SoCalGas continued the programmatic successes achieved in previous program cycles, and further refined its program delivery and implementation processes to actively seek EE opportunities and adapt to its diverse customer base. Additionally, SoCalGas continued the implementation of its 2018-2025 EE Business Plan approved in Decision (D.) 18-05-041 and continued its EE third-party solicitation process approved in D.18-01-004. SoCalGas demonstrated the success of its programs by saving customers more than 46.5 million net therms in 2020, which represents 137% of the energy efficiency goal established by the California Public Utilities Commission (Commission or CPUC) in D.17-09-025. SoCalGas cost-effectively administered EE savings to customers, providing ratepayers over \$314 million in resource benefits. In addition, as part of SoCalGas' commitment to help California meet its goal of greenhouse gas (GHG) emission mitigation, its EE programs avoided over 267,000 tons (net) of carbon dioxide (CO₂).

SoCalGas continues to work closely with the Commission and other stakeholders to achieve California's strategic vision and goals to ensure: (1) maximum achievement of all cost-effective and feasible energy efficiency savings in the natural gas sector, (2) programs, strategies, and offerings that provide deep, long-term energy savings, and (3) energy efficiency programs that will generate quick and low-cost reductions in greenhouse gas emissions, as adopted in the California Long-Term Energy Efficiency Strategic Plan and Energy Action Plan (CLTEESP or Strategic Plan), and contribute to a doubling of energy efficiency by 2030, as adopted by Senate Bill (SB) 350. Approved through D.18-05-041, SoCalGas' 2020 EE portfolio activities also focused on achieving the following goals of its Energy Efficiency Business Plan to: (1) facilitate, sustain, and transform the long-term delivery and adoption of energy-efficient products and services, (2) cultivate, promote, and sustain lasting energy-efficient operations and practices; and (3) meet customers' energy efficiency adoption preferences through a range of simplified offerings that address customer energy efficiency needs.

In order to achieve the Commission's aggressive long-term goals, SoCalGas has partnered with municipal electric utilities and water agencies to increase its program reach, enhance cost-effectiveness, and offer comprehensive demand-side management offerings to customers. This approach minimizes lost opportunities, allows for more comprehensive and deeper energy efficiency projects, and increases operational efficiencies allowing for a more streamlined delivery of ratepayer-funded programs.

Notable successes during program year 2020

Residential Programs

In 2020, the Residential Energy Efficiency Program (REEP) program offered a variety of sub-programs targeting existing single and multi-family markets and residential new construction. Although 2020 proved to be a challenging year due to the COVID-19 pandemic, SoCalGas was successful in its program offerings and strived to meet its customer needs and achieve program goals. Highlights of program performance are listed below.

Residential - Energy Advisor

Despite COVID-19, the Residential Energy Advisor program completed online audits increased to 16,758 which represents a 573% increase over the 2,490 online surveys completed via the universal audit tool in 2019. Since the go-live of the new universal audit tool in August of 2020, thousands of SoCalGas customers have adopted the platform and are using it actively to manage their energy use -- within two to three months, more than 3,494 customers interacted with the personalized savings programs. Over 450 customers have enrolled in personalized programs and more than 2,000 customers have received personalized savings tips.

Home Energy Efficiency Rebate Program

Despite COVID-19, the HEER program managed to process 15% more applications compared to 2019 (54,127 vs 63,046). Much of the increase in applications can be attributed to the 50% incentive kicker during Q3 and Q4 of 2020. Many of the tankless water heater manufacturers and pool heater manufacturers experienced product shortages or installation time constraints due to not being able to install qualifying units in a timely manner. Pool heater manufacturer noted a 40% increase in pool heater sales due to COVID-19 as well as the 50% kicker since more customers are at home. The HEER program generated 615K gross therms in 2020. In addition, 3X the number of tankless water heater rebates were processed compared to 2019.

Plug Load and Appliances – POS

Despite COVID-19 and limited program offerings, the PLA POS program was very successful at rebating both storage and tankless water heater measures. The additional 50% incentive kicker resulted in the program exceeding savings goals by 160%.

Residential HVAC Upstream

Despite COVID-19, the HVAC upstream program saw an increase in the number of upstream natural gas furnace measures rebated due to the increased rebates during the second half of 2020. Res HVAC upstream is 148% over 2020 savings goal.

The Whole Building Multifamily Program

In 2020 the program gained 70+ leads because of extensive outreach activities with 42 projects onboarded in for a 300% increase over 2019 with 13 projects completed with 64,486 gross therms savings.

Several of these projects benefited from the program partnership with Los Angeles Water and Power (LADWP), which allows customers to conduct gas and electric upgrades to receive a significant incentive for all upgrades, through a single transaction.

Multi-Family Energy Efficiency Rebates

The 2020 MFEER program year faced its challenges due to stay-at-home restrictions, working from home mandates for many employees and distance academic learning for youth necessitated by COVID-19.

These challenges were very specific to the MFEER program since many tenants of rental housing were hesitant or resistant to allow Multifamily (MF) property owners and contractors to enter their dwelling units for retrofit work due to health concerns. However, the program team persevered and was able to achieve notable MF customer participation in 2020. The year ended with boiler controller rebates being the most prominent application submissions, accounting for 77% of the submissions, followed by central tankless water heater rebate submissions at 15%. Collectively, these two measures represented 92% of MFEER in 2020.

Residential New Construction

SoCalGas earned an ENERGY STAR Certified Homes Market Leader Award in recognition of its continued commitment to providing our nation's homebuyers with ENERGY STAR certified homes. This award recognizes SoCalGas' work in promoting energy efficient construction and helping home buyers experience the peace of mind, quality, comfort, and value that come with living in an ENERGY STAR certified home.

Commercial Programs

Non-residential Deemed Programs

During the final quarter of 2020, the SoCalGas Non-residential Deemed program staff offered an additional 50% incentive to all qualifying non-residential customers who purchased eligible equipment between the periods of September 1 and December 31, 2020. This incentive focused on providing monetary support to struggling businesses impacted by the COVID-19 pandemic, resulting in higher year end program uptake and participation than originally forecasted. Similarly, the same offerings were made to the Point-of-Sale Foodservice program, which encountered similar results stemming from the monetary support provided.

Public Sector

UC/CSU/IOU Partnership

Through the UC/CSU/IOU Partnerships, the University of California, Santa Barbara completed two energy efficiency projects that reduced their energy use by over 24% and saved over \$66,000 annually. The first of the two UCSB projects began in 2018 as part of the university's high opportunity projects and programs (HOPP's) initiative. SoCalGas and Southern California Edison co-funded the project, which investigated how best to update two important laboratories at the university. The utilities conducted an energy management plan to document and list the savings, costs, and measures to implement an energy efficient system. The utilities identified multiple measures to reduce energy consumption in the building's lighting and HVAC systems

by installing occupancy sensors, wireless thermostats, and low-power LED lights. The campus also added high efficiency dedicated natural gas boilers to each building. A new chilled water system including a cooling tower, and pumps were also installed. Following the installation of the energy efficient system, the utilities verified the energy systems using the Normalized Metered Energy Consumption (NMEC) approach, which uses building-level metered energy data to verify savings. The project resulted in natural gas savings of 60,959 therms, and the university received an incentive from SoCalGas of \$152,000. UCSB also installed an ozone laundry system to support their laundering of uniforms and sports gear for the university's athletic department which was eligible for a rebate from SoCalGas in the amount of \$5,850 and will save the university approximately 5,880 therms of energy.

Workforce Education & Training

Integrated Energy Efficiency Training (IEET)

IEET considered a number of approaches to adapt to the immediate implementation of COVID-19 protocols. IEET temporarily utilized a range of existing platforms to achieve transition from prohibited in-person seminars to online webinar delivery to continue providing learning resources to our customers. Solutions also included collaboration with the various IOUs to share online workshops & training resources that provided value to each IOU's prospective audiences. The immediate mandate to transition from majority in-person seminars to online learning, primarily through webinars, required evaluation of various market platforms for immediate delivery of content, long-term effectiveness, ease of access, user friendly experience & cost. All were successfully addressed during the transition period.

Home Energy Rating System

In 2020, the HERS Program worked to adapt its delivery to address the health and safety mandates required by local and state governments in response to COVID-19. Working in collaboration with our training sub-contractor, Wollin Group, we quickly developed online versions of the most popular Program curriculum. Additionally, we changed the Program website to promote the new, online streaming classes to our existing partners and registered past participants to ensure that Program changes were communicated. These collaborative efforts succeeded, and production goals were met in 2020. 28 classes were delivered in 2020. 669 students attended classes over the year with an attendee average of 22.3 students per class (an increase of almost 4 students per class over 2019). DBE spending remained strong with a yearly average of 24.1%. This demonstrates the continued commitment to working with DBE vendors, whenever possible, in order to align with SoCalGas® overall goals. 2020 DBE spend exceeded 25% during three months of the year. The highest monthly DBE spend (41.6%) occurred in August. Changing the Program format to online streaming classes allowed us to overcome some of the usual barriers faced during in-person classes and provided students with an easily accessible option. The complications of travel obstacles due to weather or traffic are eliminated in the online environment.

Career Connections

A teacher from Oxnard High School in Oxnard, California has been teaching SEI's two Energy Environment and Utilities pathway courses, Innovations in Green Technology (IGT) and Energy and Environmental Design (EED) since 2018. In addition to utilizing SEI's curriculum resources

for her students, she has consistently led her students in the annual Energize Schools Energy Conservation Competitions. This year the tradition continued, and she led her students through SEI's virtual Energy Challenge. In the Fall of 2020, over 70 students from Oxnard High School participated in The Energy Challenge and 26 students completed all four challenges and received Energy Specialist Certificates.

Project of the Year:

SoCalGas worked with a large petrochemical industry customer in 2020 to implement a Pressure Swing Adsorption (PSA) Modernization project. This customer participated in the SoCalGas Energy Efficiency Calculated Incentive Program (EECIP) and was awarded an \$1,000,000 incentive for meeting all eligibility criteria required by both SoCalGas and the CPUC. The project involved the installation of a novel molecular sieve and densely packed particle bead media bed in the PSA Unit of a Hydrogen production Steam Methane Reformer. This Energy Efficiency Measure resulted in 1,447,048 therms of natural gas savings, a reduction of 7,680 tons of Carbon Dioxide emissions, and the elimination of 6,866,727 gallons of feed water annually all while increasing the plant's production of Hydrogen.

2020 Program Roster

Statewide Energy Efficiency Programs

- Residential Energy Efficiency Programs
- Commercial Energy Efficiency Programs
- Industrial Energy Efficiency Programs
- Agricultural Energy Efficiency Programs
- Emerging Technologies Programs
- Workforce Education and Training
- Statewide Marketing Education and Outreach
- Energy Efficiency Finance Programs

Government/Institutional Energy Efficiency Partnership Programs

- California Department of Corrections Partnership
- California Community College Partnership
- University of California/California State University/IOU Partnership
- State of California/IOU Partnership
- Los Angeles County Partnership
- Kern County Partnership
- Riverside County Partnership
- San Bernardino County Partnership
- Santa Barbara County Partnership
- South Bay Cities Partnership
- San Luis Obispo County Partnership
- San Joaquin Valley Partnership
- Orange County Partnership
- SEEC Partnership
- Desert Cities Partnership
- Ventura County Partnership
- Local Government Energy Efficiency Pilots

- New Partnerships Programs
- Regional Resource Placeholder
- Gateway Cities Partnership
- San Gabriel Valley COG Partnership
- West Side Community Energy Partnership
- Western Riverside Energy Partnership
- North Orange County Cities Partnership
- San Bernardino Regional Energy Partnership

Third Party Energy Efficiency Programs

- Small Industrial Facility Upgrades
- On Demand Efficiency
- HERS Rater Training Advancement
- Community Language Efficiency Outreach
- Multifamily Direct Therm Savings
- LivingWise™
- Manufactured Mobile Home
- Instant Rebates! Point of Sale Foodservice Equipment Program
- On-Premise Ozone Laundry

Pursuant to D.18-01-004 Ordering Paragraph (OP) 8, SoCalGas hereby provides information of all third-party contracts for programs noted above in Appendix C of this report. SoCalGas describes the activities performed and the successes achieved during the 2020 program year in these programs in the section entitled *Program Description and Strategies* below.

Program Descriptions and Strategies

Residential Energy Efficiency Programs

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

SoCalGas' Residential Energy Efficiency Programs focus is to:

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

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

Additional residential energy efficiency programs include the HOPPs (High Opportunity Projects or Programs) Central Water Heater Multifamily Building Solution Program and AB793 Residential Energy management Technology Solution Program.

SCG3701 Residential – Energy Advisor

This program is a continuation of the existing statewide Energy Advisor Program within the residential energy efficiency portfolio. SoCalGas' Energy Advisor Surveys were delivered to customers through the universal audit tools. Through these tools, customers were afforded information regarding their energy use while empowering them to better manage consumption. There were 16,758 online SoCalGas Advisor Surveys completed in 2020. This is a 573% increase over the 2,490 online surveys completed via the universal audit tool in 2019. Since the go-live of the new universal audit tool in August of 2020, thousands of SoCalGas customers have adopted the platform and are using it actively to manage their energy use -- within two to three months, more than 3,494 customers interacted with the personalized savings programs. Over 450 customers have enrolled in personalized programs and more than 2,000 customers have received personalized savings tips.

While the program did reach customers in the first three months, one of the hindrances faced includes Energy Advisor survey completion rate via the Universal Audit Tool (UAT). This occurred only in the first three months due to the distress in completing the survey due to its length. The replacement of the new audit tools in August proved to be faster, more simplified, and easier for customers to complete. For the last three years, the completion rate remained flat until the implementation of the new simplified online audit tool in 2020.

The replacement of the Energy Advisor online audit tool, improved customer experience by making it easier for customers to sign on to the tools. In order to increase the digital experience with web users, SoCalGas utilized focus groups and leveraged their feedback to develop well-designed experiences that enhanced consumer engagement, simplified program enrollment, provided a rich set of tools to allow users to analyze their gas usage and allowed them to

compare bills to learn insights on why their usage could vary from month to month. The information provided to customers allowed personalized experience by recommending applicable programs, rebate offers, and energy saving tips to reduce natural gas consumption and lower gas bills.

The objective of Energy Advisor Surveys is to provide energy efficiency education to customers. Since the go-live date of the improved Universal Audit Tool (UAT), a total of 153,819 customers have interacted with the Analyze Usage function. Additionally, the total pageviews has increased year over year by 34%, with an average time spent on the page increased by 1:31 minutes.

SCG3702 Residential – Residential Energy Efficiency Program

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

The Multifamily Energy Efficiency Rebate (MFEER) program is a sub-program within the Residential Energy Efficiency Program (REEP), that offers cash rebates available for the installation of qualified energy efficiency products in apartment dwelling units and in the common areas of apartment complexes, condominiums, and mobile home parks. Residential multifamily complexes with two or more dwelling units may qualify. Dwelling units must be fully constructed and occupied. New construction does not qualify for this sub-segment. The Home Energy Efficiency Rebate program was successful in 2020. The HEER program achieved its success due to the continued and improved efforts, with participating retail partners through retail personnel education of the SoCalGas mobile application and increased rebates and an added incentive kicker in Q3 and Q4 of 2020 which resulted in a successful program year. SoCalGas was also able to maintain visibility in hard to reach (HTR) retail stores through in-store marketing communication despite limited in-store visits in 2020. With SoCalGas processing rebates in-house coupled with a fully functioning mobile application and online web application, the SoCalGas HEER program, despite the COVID-19 pandemic, experienced an increase in rebate applications with close to 90% of rebate applications coming from the mobile application in 2020.

The 2020 MFEER program year faced challenges due to stay-at-home restrictions, working from home mandates for many employees and distance academic learning for youth necessitated by COVID-19. These challenges were very specific to the MFEER program since many tenants of rental housing were hesitant or resistant to allow Multifamily (MF) property owners and contractors to enter their dwelling units for retrofit work due to health concerns. However, the program team persevered and was able to achieve notable MF customer participation in 2020. The year ended with boiler controller rebates being the most prominent application submissions,

accounting for 77% of the submissions, followed by central tankless water heater rebate submissions at 15%. Collectively, these two measures represented 92% of MFEER in 2020. The success of the program in 2020 was based on several factors. This included forging new relationships with external partners like manufacturers and contractors to act as “ambassadors” for the rebates which facilitated MF customer’s participation in MFEER and to help promote increased year-end rebates. The program team actively worked with internal corporate marketing to ensure MFEER content was accurate at SoCalGas.com. The team conducted successful e-mail marketing campaigns throughout 2020 achieving double digit open and click thru rates. It hosted the first of its kind virtual MFEER Boiler Controller Webinar (with assistance of a knowledgeable water heating contractor) and MFEER Tankless Water Heating Webinar (with the contribution of a notable manufacturer) to educate customer on the rebates and qualifying equipment. We worked together with the internal MF account executives to educate, engage, and enroll customers. Additionally, the MFEER team collaborated with SoCalGas My Account team to be able to offer the first of its kind, Ways to Save Survey for MF customers which can remotely provide energy efficiency tips, programs and rebate information tailored specifically for this segment. In addition to executing effective marketing and outreach throughout 2020, the program team worked closely with Support Services team to efficiently processes complex MFEER applications, implement virtual inspections for MFEER verification and offer live chat for MFEER customer follow up.

Beyond successful program implementation, the MFEER team collaborated with the OBF team to develop a decision tree to help customers learn how to benefit from financing options and identify 2021 customer initiatives. The MFEER team also worked with Metropolitan Water District, Support Services and Engineering to develop the new MFEER Vending Machine Clothes Washer Rebate to be launched in early 2021. Overall, MFEER made a significant contribution to the annual RES EE program in 2020 despite many challenges seen in the marketplace related to the pandemic.

EENH participation increased in 2020 by removing the 3-measure minimum requirement. This change was made to align EENH with changes in the residential new construction industry and builder preferences.

The SoCalGas HEER program did not experience any barriers or encounter any major problems in 2020 other than a decrease in retailer outreach due to the COVID-19 pandemic. EENH program did not experience any barriers or any major problems in 2020.

The Multifamily Single Point of Contact working alongside the MF dedicated Account Executive Team, offered customers focused customer service, and succeeded in engaging, educating, and enrolling them in the MFFER program in 2020. In the wake of COVID-19 and achieved notable performance for MFEER by virtual outreach to customers, direct email marketing campaigns, and collaborating with internal departments and external vendors to enroll customers in rebate programs. As a result of our efforts and the increased rebates offered at the end of 2020, the program experienced a dramatic increase in the number of MF applications received, in comparison to previous years. We also collaborated with Support Services to mitigate the challenges like restricted access to housing units for inspections.

The SoCalGas HEER program made rebate adjustments in 2020 by increasing the rebate amounts and introducing an added incentive kicker during Q3 and Q4 of 2020. The EENH program made rebate adjustments in 2020 by increasing the rebate amounts to align the offerings with the HEER and MFEER programs. The three-minimum measure requirement was also removed for EENH.

The MFEER program launched a new measure in 2020, the Residential Natural Gas Oven Rebate in October 2020. Plus, successfully offered increased rebates 50% higher from 9/1/20 to 12/31/20 to great customer reception and participation. This trend of strong customer program participation seen in 2020 Q4 is expected to continue into 2021 Q1 since many MF customers installed qualifying energy efficient equipment as late as Dec 2020. SoCalGas anticipates most applications will be for rebates for in-dwelling tankless water heaters, central domestic hot water measures and boiler controllers.

The SoCalGas HEER and EENH programs met overall program objectives for 2020. MFEER 2020 program faced additional challenges during 2020, due to the pandemic. However, the program successfully maintained customer interest and participation, due to the resilience of program staff to innovate and create new channels of communication and outreach between customers and the program. Thanks to such innovation (webinars, virtual inspections, virtual SPOC/AE calls, and live chat) the program observed the highest participation rate recorded in the past few years.

SCG3703 Residential – Plug Load and Appliances – POS

The PLA POS program merges the former HEER, BCE, and ARP programs. This subprogram develops and builds upon existing POS retailer relationships and includes RAD appliance recycling strategies. PLA POS (Point of Sale) offers rebates and incentives instantly, at the point of purchase to customers for purchasing and installing Energy Star qualified appliances such as clothes washers, clothes dryers, and storage water heaters.

The PLA POS program continued efforts in 2020 on a smaller scale compared to previous years with the goal of having rebate visibility and increased retailer/customer participation and utility presence at retail locations until the Statewide Plug Load and Appliance program goes into effect. Residential appliance rebate offerings have become the major contenders for future POS program developments with additional programs being considered. Promotions focused on using consistent POP marketing material statewide and weekend local store outreach, set the foundation for targeted promotions and retailer participation.

SoCalGas coordinated efforts with participating retailers to promote rebates and other SoCalGas residential measures at in-store outreach events throughout Q1 2020. In-store events were removed for the remainder of 2020 due to the COVID-19 pandemic. SoCalGas outreach representatives maintained program visibility through rebate signage, mobile applications and mail-in applications left at the retailers.

The SoCalGas's mobile application proved to be highly successful at retail locations for eligible appliances not covered by instant rebates.

The 2020 COVID-19 pandemic was a major challenge, and affected point of sale rebates compared to previous years.

Increased rebate amounts as well as an additional incentive kicker on natural gas storage heaters helped with the program's success during the second half of 2020. Program objectives were met in 2020.

SCG3705 Residential – Home Upgrade Program

SoCalGas Home Upgrade Program (HUP) uses a holistic approach to identify and correct comfort and energy-related deficiencies in single family detached homes. Contractors employ building science principles and use sophisticated diagnostic equipment to detect the cause of home performance related problems, and quickly and accurately address them. There are two options to this program, Home Upgrade and Advanced Home Upgrade. These options allow the customer to choose from a variety of measures that best suit their home and needs. Some examples of measures used consist of attic insulation, air sealing, duct testing, HVAC change out, hot water heaters, pipe wrap, Showerstart thermostatic control valves, along with combustion safety testing. This program was sunsetted in 2020.

SoCalGas Multifamily Whole Building Program seeks to deliver comprehensive energy efficiency upgrades tailored to the needs of existing multifamily dwellings and their owners, tenants, and management companies. The program promotes long-term energy benefits through comprehensive retrofit measures including building shell upgrades, high-efficiency HVAC units, central heating and cooling systems, central domestic hot water heating and other deep energy reduction opportunities. These energy measures are identified through an investment grade assessment. A performance-based approach is intended to assist property owners and managers with making informed decisions, identify measures for energy savings, and to maximize energy reductions for each property owner, manager, and tenant, as applicable. The SF HUP program completed approximately 57 home upgrade projects prior to being sunsetted.

The Whole Building Multifamily Program gained 70+ leads in 2020 as a result of extensive outreach activities. Several of these projects benefited from the program partnership with Los Angeles Water and Power (LADWP), which allows customers to conduct gas and electric upgrades to receive a significant incentive for all upgrades, through a single transaction. Approximately 15 projects were completed in 2020 out of the total pipeline gathered. The remaining projects are expected to be completed in the following year.

In total, the Whole Building Multifamily Program served almost 2,000 dwelling units through the completed projects in 2020. Four Hard to Reach/Disadvantaged Communities (HTR/DAC) properties are accounted within these totals.

A barrier to implementation of the Whole Building Multifamily program has been lack of customer awareness regarding comprehensive energy efficiency and programs available. Another barrier was the “split-incentive”: the property owner invests capital, but the savings

primarily benefit the tenants. Further, another barrier has been accessing investment capital and an insufficient return on investment (ROI). Up-front out-of-pocket costs and extended payback periods pose a significant participation barrier for property owners and managers. Additionally, complications while coordinating installation and interaction through multiple contractors and visits necessary posed more barriers. Another challenge was the time burden for tenants and owners along with access to dwelling units. This aspect was key to 2020, as COVID-19 made interactions among stakeholders difficult, due to restrictions to in-person gatherings/visits. Lastly, specific to 2020, due to COVID-19, standard outreach practices and events were canceled, thus causing an unexpected change in communication with the Multifamily customer segment.

The Single-Family program was sunsetted in 2020, and the Whole Building Program made slight changes to its incentive tier structure; the maximum incentive amount is to be determined according to property type: market rate or affordable. Affordable Projects can be incentivized up to 65% project cost. To qualify for the Affordable Incentive Path, a project must be classified as a Disadvantaged Community (DAC) or Hard to Reach (HTR). Additionally, projects that meet the Energy Savings Assistance program (ESA) guidelines are also eligible for the Affordable Incentive path. SPOC and program staff assist customers in determining eligibility. Market Rate Projects can be incentivized up to 50% of total project cost. Market Rate is defined as any property that is not affordable. The total project incentive is based on either: the tiered incentive structure determined by number of dwelling units at the property OR the maximum incentive level permitted, whichever is lower. Additionally, changes were made to the logistics of program delivery and outreach: 1) Inspections: In-person verification of installation of measures was replaced by virtual calls/meetings. This shift allowed for projects to continue moving through the pipeline to be on-boarded and verified once measures were complete, while providing customers peace of mind that their projects would not be delayed due to COVID-19 restrictions; 2) Outreach Events: In-person seminars intended to educate customers and contractors on the program and its processes were canceled due to COVID-19. Therefore, all aspects of physical outreach and the materials involved to conduct it were eliminated. These activities were replaced with webinars and the program relied on a heavy focus on electronic communication to deliver program information through e-blasts and the SoCalGas program webpages.

The added changes to the program incentive structure have resulted in a continued high interest from participants, since it illustrates the program's intent to incentivize HTR, DAC, and affordable housing. Participants have expressed feeling connected to the program vision and bring forward projects with the intent to serve/upgrade HTR, DAC and affordable housing properties.

The program was able to overcome the challenges posed by the pandemic. It was acknowledged that in person interactions had to be limited and the program promptly implemented alternatives for such interactions. Customers participating and expecting to participate, were clearly communicated of such alternatives, which allowed for projects to continue moving through the program pipeline. In 2020, SoCalGas continued its partnership with LADWP and the SoCalREN Multifamily Program. The relationship with LADWP was of great benefit to customers seeking a holistic approach to conducting electric and gas property upgrades.

Similarly, constant coordination with SoCalREN program allowed for exchange of program updates and thus successfully address customer questions whenever necessary.

SCG3706 Residential – Residential HVAC

The Residential Upstream High-Efficiency Furnace Rebate Program provides incentives to distributors for stocking and selling high-efficiency furnaces. By offering equipment incentives at the upstream, the Program maximizes the opportunities to influence the repair/replace or purchase decision and transform the furnace market through the supply chain. Manufacturers and distributors influence furnace purchases and stocking and may use the incentives at their discretion to promote high-efficiency product sales.

The Residential HVAC Upstream program experienced great success in 2020 due to early engagement of manufacturers and distributors in the program along with increased central furnace rebates. Upstream participation from a major gravity wall furnace manufacturer also contributed to the success of the program in 2020.

Distributors have reported difficulty obtaining the necessary project and customer data. Inspections continue to provide challenges as the downstream consumer is often disconnected from the Upstream transaction. However, distributors have become accustomed to the data requirements and have made adjustments to accommodate the program needs. Zip code validation only on high efficiency upstream furnaces may provide a solution for the distributors and will be considered moving forward to encourage participation.

Increased upstream rebate incentives helped motivate manufacturers/distributors to promote the program even during the COVID-19 pandemic.

The SoCalGas Res HVAC program objectives were met in 2020.

SCG3707 Residential – RNC

The California Advanced Homes Program (CAHP) is a comprehensive residential new construction concept with a cross-cutting focus on sustainable design and construction, green building practices, energy efficiency, and emerging technologies. Through a combination of education, design assistance and financial support, the CAHP works with building and related industries to exceed compliance with the California Code of Regulations, Title 24, Part 6, Building Energy Efficiency Standards for Residential and Nonresidential Buildings (Standards), to prepare builders for changes to the Standards and to create future pathways beyond compliance and traditional energy savings objectives. Participation is open to single-family as well as low-rise and high-rise multi-family residential new construction built in an Investor-Owned Utility (IOU) service area.

The Program was closed at the end of 2019 in anticipation for the launch of the statewide residential new construction program to be implemented by a third party under PG&E Lead. Activities in 2020 were focused on enrolling projects that were submitted in 2019 and processing and paying the incentive for projects submitted in prior years.

SCG3762 Residential – Community Language Efficiency Outreach

The Community Language Efficiency Outreach Program (CLEO) is a highly targeted residential Energy Efficiency (EE) Marketing, Education and Outreach (ME&O) and Direct Install (DI) program specifically targeted to the Vietnamese, Indian, Chinese Korean, Hispanic and African American (VICK-HA) speaking customers of Southern California Gas Company (SoCalGas). The CLEO has a unique, 100% in-language strategy which serves a key role in overcoming the English as a second language market barrier and targets hard-to-reach, low- and medium-income customers.

The CLEO markets SoCalGas programs and offers energy efficiency education and training and participates in community events, where customers are encouraged to fill up energy efficiency surveys and sign up for direct install of EE measures. The CLEO's marketing efforts encourage and create participation in SoCalGas energy efficiency programs. The CLEO also targets SoCalGas customers in other Southern California Power Producers Association (SCPPA) municipal cities.

In 2020, the CLEO struggled to meet its goals because of COVID-19. The CLEO emphasized on working with faith-based organizations and community-based organizations especially in Hispanic communities.

The CLEO also continued to reach out to foodservice business ethnic customers to educate them on SoCalGas foodservice programs such as EE programs, rebates, and Energy Resource Center workshops. In addition, customers are encouraged to take advantage of the no-cost direct install offerings.

The CLEO school program had contacted schools and was progressing when COVID-19 shutdown the schools and offerings were stalled.

Foodservice business ethnic customers were also closed from March onwards and they re-opened in June. The program proceeded with the marketing and outreach. However, customers were reluctant to participate in the free Direct Install offerings.

The CLEO program mirrored the program in 2019 and no changes were made.

In 2020, the CLEO struggled to meet its goals because of COVID-19. CLEO continued to have a significant impact on middle to low-income customers who clearly demonstrated a stronger interest in energy efficiency program offerings. This also extended to increased participation in the incentives and services offered by the SoCalGas.

In 2020, the CLEO struggled to meet its goals because of COVID-19. CLEO provided 8 booths, 130 foodservice surveys as part of its ME&O.

The CLEO installed 215 bathroom aerators, 18 kitchen aerators, 151 showerheads, 120 tub-spout diverters, 132 Nest thermostats and 91 hot water pipe sleeves.

SCG3763 Residential – Multi-Family Direct Therm Savings Program

The Multi-Family Direct Therm Savings Program (marketed as “*Energy Smart*”) targets owners and management companies of multi-unit residential properties. The program encourages participation by providing energy efficient products and installation at no cost to the end use customer directly or through authorized subcontractors. Marketing activities focus primarily on apartment building owners and management companies.

The Energy Smart Program encountered a very difficult implementation year in 2020 therefore, program successes were limited. The Energy Smart Program strategically partnered with two subcontractors in 2020 for the installation of measures with their customer base multi-family properties. The program had an active install period of six months in 2020 and was able to serve 10,000+ units in this limited time frame. A little over 16,000 energy efficient devices were installed. The Energy Smart Program was able to execute the installation plan for a large management company in conjunction with their authorized subcontractor installing 4,075 smart thermostats in 45 days.

The Energy Smart Program encountered several barriers and challenges in 2020. The program’s start date was delayed until 3/5/2020 due to contract delivery delays. Once the contract was received, the program was suspended on 3/18/2020 due to COVID-19 circumstances. The program was allowed to begin again on 6/1/2020 however, the program was not able to secure any installation appointments until July due to the challenges of COVID-19 and the need for apartment unit entry. The program faced major challenges on scheduling and getting into apartment units for non-critical work in 2020. Most of the communities in the customer funnel would not schedule install appointments due to various reasons such as: sites were only addressing critical site maintenance requests, lack of resources on site for any non-critical work, approval delays to enter apartment units due to stay at home orders throughout the year and backlog maintenance tickets that took top priority over upgrades. This was a very difficult implementation year due to the health crisis nationwide and the core scope of program work was dependent upon entering people’s residences during a pandemic to conduct non-critical updates

In 2020, there were minor changes to the program contract. Low flow toilets and the DHW pump controller were added as available installation measures through the program. Also, an additional direct install budget was awarded in November to support the large management company portfolio installation of smart thermostats.

The Energy Smart Program installed over 16,000 energy efficient devices in 2020 within six months. The 2020 contract terms goal and budget were not met due to the unexpected contract delay and program shutdown due to COVID-19 allowing only six months for program installation. During those six months of activity, unfortunately the barriers and challenges mentioned above also impacting objectives being met.

SCG3764 Residential – LivingWise

LivingWise is a residential energy education and savings program delivered through schools. Southern California Gas Company (SoCalGas) collaborated with six different California

municipalities, utilities, or water agencies (Golden State Water, California American Water Co. [Los Angeles and Ventura], City of Torrance, City of Santa Barbara, Mission Springs Water District, and Moreno Valley Utilities) to implement this program.

The Program is a 6th grade Education model built on a proprietary Measure-Based Education (MBE) methodology. This results in students who readily engage in the teacher-led education within their school and are empowered by the hands-on, lab-based take-home measure installations within their homes. This personalized education program delivers increased energy literacy, optimum installation rates, and a deeper understanding of energy efficiency concepts, including Integrated Demand Side Management (IDSM). Teachers are incentivized to implement the program in its entirety and return Student Surveys for EM&V reporting. The program optimizes energy savings and behavior change while supporting California state standards-based core classroom curriculum while enabling teachers to control the timing and pace of the program delivery.

The Program's educational content is aligned with State Learning Standards as well as the rigorous expectations of STEM (Science, Technology, Engineering, Mathematics disciplines) and is offered to eligible teachers as an elective (supplemental) program. Teacher enrollment is high, and overall participant program satisfaction, including parents, is excellent.

The 2020 LivingWise Program, along with the rest of the planet, faced unprecedented challenges posed by the Coronavirus. These challenges did not allow the program to reach its annual goal of serving 39,292 sixth grade students. AM Conservation Group (formerly Franklin Energy Services) implemented a number of immediate solutions to allow program delivery despite the pandemic. In 2020, we implemented direct to student shipment options, residential bulk shipment options for teachers, bolstered online resources and increased our digital resource library specific to the LivingWise Program.

2020 was a year unlike any other, chalk full of unexpected and unprecedented difficulties, the LivingWise program was not immune to these impacts. Beginning in March 2020, nearly all schools within the SoCalGas service territory were disbanded, creating a barrier for outreach to our pool of targeted teachers. Our standard program method was not a viable option during this period of schools operating remotely, which caused us to pivot and implement immediate strategic solutions. Despite these solutions, enrollment numbers plummeted during this period and created a steep hill to climb in the Fall semester which was ultimately unachievable.

Historically, we have not had enough budget to meet demand for the program. We expect to see a shift back to that dynamic during the 2021 year.

Franklin Energy Services has transitioned management of the LivingWise Program to AM Conservation Group, Inc. (same program management team). Due to inventory on hand, the program materials will reflect this shift during the 2021-2022 school year.

Beyond design, our program team implemented the following solutions to accommodate and supplement program delivery during the pandemic: Online Student and Teacher Survey Portals,

updated SoCalGas Getwise.org enrollment site, created the SoCalGas LivingWise Book Walk Video, added multiple delivery methods for direct to student and/or teacher shipping.

Due to the difficulties posed within 2020, the LivingWise Program did not meet participation objectives, annual therms savings goals or the DBE spend equating to 40% of the annual program budget. All goals were significantly and solely impacted by the Coronavirus pandemic. Organizationally, we are confident in the LivingWise Program and believe we will gain back the lost traction from 2020 during the 2021 period as a sense of normalcy continues to return.

SCG3765 Residential – Manufactured Mobile Home

The Manufactured Mobile Home Program (MMHP) is designed to provide energy efficient gas measures on a comprehensive basis to manufactured mobile home customers in the Southern California Gas (SCG) service territory. These energy efficient measures include duct test & seal, kitchen and bathroom faucet aerators, low flow showerheads and tub-spout & thermostatic shutoff showerhead.

MMHP served nearly 3,000 customers in 2020. Thousands of customers were served notwithstanding the unique market challenges that COVID-19 presented. The program delighted these customers by achieving a 98% Net Promoter Score for customer satisfaction that was surveyed and verified by an independent third party.

COVID-19 presented challenges for MMHP in 2020. The first challenge was due to COVID-19-19 health and safety concerns, the program was on hold from March through June 2020. During that time, the program was unable to serve customers setting the program back 25% of the allotted time to achieve program goals. Interested customers were put on a waiting list to be served when the program reopened in Q3 2020.

In July, the program reemerged with the program implementer wearing personal protective equipment (PPE) following strict COVID-19 safety protocols. Manufactured housing customers and communities slowly began to allow MMHP services once again with the exception of the senior citizen communities due to ongoing health safety concerns related to COVID-19. The senior citizen communities make up a significant population of the manufactured housing market segment. In this way, the pandemic reduced the eligible program customer base.

Program services resumed in Q3 of 2020 and demand was strong for the program in the mobile manufactured housing segment with the exception senior citizen communities. SoCalGas customers were home more than pre-pandemic conditions and available for program participation. Customers were served safely by the implementer adhering strictly to COVID-19 safety guidelines by wearing personal protective equipment, doing a daily symptom check, and sanitizing the work area after each job.

In 2020 MMHP served approximately over 3,000 manufactured homes. By approaching the program's offerings from a cost-effective and customer centric perspective, these allowed SoCalGas to achieve the program goal of maximizing ratepayer dollars while providing a

delightful experience to customers. These efforts resulted in MMHP successfully delivering a comprehensive mix including HVAC optimization and water heating energy efficiency. All of the efforts made throughout 2020 assisted the program's participation, helped to raise program awareness with qualifying customers and further promoted the benefits of energy efficiency across SoCalGas's service territory.

SCG3810 Residential – Smart Home Optimization Program

The Smart Home Optimization Program (SHOP) is a comprehensive energy savings program which installs energy management technologies in single-family residential homes which meet the eligibility requirements of the program. Program measures which include a Wi-Fi thermostat, a cloud optimization protocol (controlling the thermostat), water heater controller, and a thermostatic control valve. Program measures were selected based on their ability to deliver high energy savings for their cost and persistent savings over time. To encourage persistency of savings, Program Installation Contractors (PIC) will educate homeowners on the benefits of the measures and how they work. Energy savings will be derived on a monthly basis by an SCG-contracted third party using the CalTRACK normalized metered energy consumption (NMEC) methodology.

Some program successes in 2020 include the following:

- **COVID-19 Response** – In 2020, the global pandemic of COVID-19 disrupted the original program design of using a PIC in customer's homes to install the devices. In response, ICF and SoCalGas pivoted to an emergency and temporary self-install model that allowed qualifying customers to install the devices on their own and/or with virtual assistance from the PIC. We were able to keep the program open for customers, and successfully installed program measures in 105 homes.
- **Program Website and Tools** – The customer facing website was streamlined to improve the ease of applying to the program, while also providing the program staff adequate information to confirm customer eligibility. Preparing for a return to PIC in-home installations, ICF also streamlined our Sightline Mobile application to reduce time in customer's home while still providing proper information to document and verify measures installed.
- **PIC Contract** – Subcontract agreement fully executed with PIC:
 - The Threshold Group, Inc.
- **Projects Installed** – Successfully installed program measures in 105 homes.
- **Enrollments into EECF** – ICF developed an automated report to bulk enroll projects into EECF. All projects will be enrolled by mid-February 2021.

Some implementation barriers or problems encountered in 2020 include the following:

- **COVID-19** – The impacts of COVID-19 including health concerns and state/local mandated lockdowns and social distancing were major setbacks for the program that delayed installations. Fortunately, ICF and SoCalGas were able to act quickly to implement a self-install model that allowed the program to continue serving customers without adversely affecting their health or interfering with legal restrictions of lockdowns and/or social distancing.

- **Stranded Assets** – The self-install path was critical to keeping the program operational considering the restrictions imposed by COVID-19. However, this path allows for some devices shipped to not be installed, imposing a cost barrier on the program in the long-term.

A change made to the program in 2020 included an amendment to the program implementation plan to provide a self-install pathway enabling customers to participate in the program without a PIC conducting the install.

Objectives met by the program in 2020 include the following:

- 105 homes installed.
- 164 total devices installed.
- 42 projects submitted into EECP.
- Had regular bi-weekly check in meetings with program stakeholders.

SCG3820 Residential – Direct Install Program

The Residential Direct Install (RESDI) is a no-cost energy assistance program for SoCalGas customers. The Program provides no-cost energy improvements to eligible customers to help make their homes more comfortable and help conserve energy, which could lead to lower utility bills.

The program is available to renters and homeowners living in single-family and multifamily dwellings. Program services are provided by authorized vendors who are not employees of SoCalGas or Sempra Utilities, but are under contract to SoCalGas to deliver program services. A qualified contractor will assess your home for energy-saving services and program eligibility, a minimum of three must be installed.

The program was successful in the following ways: Partnered with municipalities to present a collaborative outreach approach to customers and assist with the attainment of more energy savings in the home; Provided an alternative for Energy Savings Assistance contractors in the sales process to offer energy savings measures to customers that did not qualify for the ESA programs; And the program saved customers 26,833 net therms.

All in home services were suspended for three months until contractors developed and implemented COVID-19 safety procedures. Although precautions were taken, contractors encountered customer resistance to participate due to COVID-19 fears. The program was in its sunset year, giving way to the Residential Single-Family 3rd-party solicitation process.

There were no changes made to the program in 2020.

2,616 Applications were processed, and 26,833 net therm savings were achieved.

SCG3823 Residential – HVAC QI/QM

The Residential High-Efficiency Furnace Quality Installation Program provides incentives to Participating SoCalGas Customers for the installation of high efficiency gas furnaces when installed according to the ENERGY STAR HVAC Quality Installation guidelines by a Participating Contractor. By offering incentives according to the quality of installation, a greater potential of the efficiency of a particular gas furnace can be recognized.

Some of the program implementation and problems encountered in 2020 were: Product Cost – High efficiency heating equipment is expensive. The initial investment is costly and becomes more so when higher efficiency equipment is purchased. The rebates are not high enough to offset the cost of the qualifying equipment. Installation practices require extensive training and are difficult to achieve and maintain. The low incentive does not appear to be great enough to support the costs of training, commissioning, and participation in general. Inconsistencies on offerings by neighboring utilities make it difficult to partner for a more effective implementation; Title 24 enforcement and Program permitting requirements – Because permitting rates remain low, it is believed that the majority of HVAC installations are performed without a permit. These installations are typically less expensive which can lead to customers choosing a less expensive installation over a quality installation; And contract agreement issues, lack of an electric utility partner, contractor enrollment and potential transition to statewide HVAC program were barriers to launching the Quality Installation program in 2020. Data research for Quality Maintenance workpaper continued through 2020 but the COVID-19 pandemic created a delay with data collection and any such launch of a local residential Quality Maintenance program in 2020.

There were no program changes made in 2020.

The SoCalGas Residential QI/QM program objectives were not met in 2020.

SCG3824 Residential – Behavioral Program

Behavioral based energy efficiency programs focus on energy savings as a result of changes in customer usage. Behavioral programs hereinafter are mandated by the CPUC to follow three basic components: they (1) must employ comparative energy usage and disclosure, (2) must be measured ex post, and (3) must utilize an experimental design (Random Control Trial, RCT design). Randomly selected customers referred hereinafter as “treatment groups” are defaulted to receive natural gas usage feedback in the form of paper mail, email, and/or alerts utilizing Advanced Meter Usage Data. Advanced Meters remotely read and transmit customers’ hourly natural gas usage information back to SoCalGas. Advanced Meter Usage Data collected together with other demographic factors are utilized in the development of personalized natural gas usage feedback communication.

The Behavioral Program successfully reached over 1.8 million residential customers from November 2019 through October 2020. 1,424,543 of the 1.8 million were identified as high users of gas while 399,226 are low users. To efficiently reach the lower usage group, a Home Energy Report Alert was developed while paper and email continued to be distributed to the high usage group. The program extended its’ efforts to the restaurant segment and developed a restaurant

peer comparison dashboard. 37 Islands Restaurant locations agreed to participate and slated to launch in summer of 2021.

The Behavioral Program faced challenges due to the COVID-19 pandemic. Distribution of the reports paused in March 2020 and restarted in May 2020. During this time frame, modifications to the report addressing the stay-at-home order was put in place.

Changes to the program included reaching the lower usage residential customers with a Usage Alert and the restaurant sector expansion through a Usage Comparison dashboard. In addition to this, messaging modifications were made on the natural gas usage reports to address the COVID-19 pandemic from March through May 2020.

The Behavior Program met its' objectives. The program expanded the number of customers receiving the usage reports to over 1.8 million. High usage residential customers from prior years continues to receive usage reports. The program expanded to reach lower usage residential customers via usage alerts that utilized disaggregated data. A Restaurant Behavioral project commenced which will enable better understanding of the sectors' usage behavior and savings motivations.

SCG3829 Residential – Marketplace

SoCalGas' Marketplace website features incentives for energy-efficient home appliances and consumer electronics. The products featured at the site include gas water heaters, thermostats, connected home applications, gas dryers and washers. The site is mobile-optimized, so it can be viewed on a variety of devices including smart phones, tablets, and desktops. Customers who visit the site can: Create their own personalized accounts; View product energy scores; View a calculation of the energy savings that can be achieved by using more energy efficient products; View a calculation of the total cost of product ownership; Save any of their searches for future use; Sign-up to receive price change alerts; And find rebate information.

There were no program implementation barriers or problems encountered in 2020.

There were no program changes made in 2020.

SoCalGas Marketplace objectives were met in 2020.

SCG3830 Residential – Retail Partnering

In support of the Home Energy Efficiency Rebate and the PLA POS program, retail store service visits are needed to provide a comprehensive overview of SoCalGas residential energy efficiency programs to retailer personnel. Retail store visits include placement of promotional and marketing materials as well as store personnel training and program reinforcement throughout SoCalGas service territory. This service is not limited to appliance retailers, but extends to manufacturers, distributors, contractors, and residential associations that can benefit from energy efficiency education and rebates.

For 2020 emphasis on the SoCalGas mobile application was the main focus of store visits to help educate both the sales associates and customers on how easy the SoCalGas rebate process is compared to mail-in rebates. Quarterly store visits were made to over 382 appliance retailers, 150 plumbing retailers and over 240 pool retailers in 2020.

There were no program implementation barriers or problems encountered in 2020.

Additional promotion, education, and training at the retailer outlets of storage water heaters and tankless water heaters were included as part of the program to accommodate the increased rebates in Q3 and Q4 of 2020.

The SoCalGas retail partnering objectives were met in 2020.

SCG3831 Residential – EE Kits

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

The SoCalGas EE kit program was able to distribute over 241,000 EE kits in 2020 in partnership with LADWP helping customers save energy through the use of low flow showerheads and water saving kitchen and faucet aerators.

There were no program implementation barriers or problems encountered in 2020.

No changes were made to the program in 2020.

The SoCalGas EE kit program met its objectives in 2020.

SCG3832 Residential – Pasadena Home Upgrade

The Pasadena Home Upgrade Program is a direct install program that offers a variety of energy efficiency services to residential customer residing or owning homes in the City of Pasadena and served by Southern California Gas Company (SoCalGas) and Pasadena Water and Power (PWP). Services include in-home energy and water efficiency survey and weatherization services. A participant in the program can have energy and water savings measures installed at no cost. Measure cost and installation are funded by SoCalGas and PWP.

The Pasadena Home Upgrade program saw a low number of enrollments in the beginning of the year, a total of 15 homes served.

Due to Covid-19, all activity stopped from March to September which hampered the program.

No changes to the program were made in 2020.

This is a POU lead program with SoCalGas as a joint partner; their decision of holding off implementing the program for such a longer period resulted in low uptake. Annual program objectives were not met.

SCG3833 Residential – Burbank Home Upgrade

The Burbank Home Improvement Program offers a whole house approach to efficiency. All of Burbank's 20,000 single family and 23,000 multifamily homes are eligible to participate and will receive various levels of electric, water, and natural gas efficiency measures at no cost. This program is made possible by the unique partnership between Burbank Water & Power (BWP) and Southern California Gas Company (SoCalGas). SoCalGas and BWP jointly implement, within shared SoCalGas and City territory, the installation of eligible and feasible water and energy saving measures BWP implements, manages, and administers contracting of installer and is responsible for administering day-to-day coordinating with the other Parties.

The Burbank Home Upgrade program started out the year with 12 enrollments and 620 gross therm savings.

Due to Covid-19, all activity stopped in March which hampered the program.

No changes were made to the program in 2020.

This is a POU-led program with SoCalGas as a joint partner; their decision of holding off implementing the program for such a longer period resulted in low uptake. Annual program objectives were not met.

SCG3836 Residential – LADWP HVAC

LADWP's HVAC Optimization Program provides no-cost installation of smart thermostats for Los Angeles residents and businesses which is supported by LADWP's Technical Support Services Provider. SoCalGas agrees to co-fund the installation of qualifying smart thermostats for joint eligible customers.

Continued customer participation in the LADWP HVAC Optimization program solidified the ongoing partnership between SoCalGas and LADWP for 2020. The SoCalGas rebate dollars for the smart thermostat helped stretch the HVAC Optimization budget to help more customers participate in the program and enjoy the savings benefit from the smart thermostat unit.

Due to the COVID-19 pandemic in 2020, the LADWP HVAC program was suspended for a majority of 2020.

There were no program changes made in 2020.

The LADWP HVAC program objectives were not met in 2020.

Commercial Energy Efficiency Programs

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

The CEE Programs consist of six core statewide subprogram elements, including: Commercial Energy Advisor, Commercial Calculated Incentives, Commercial Deemed Incentives, Continuous Energy Improvement, and Nonresidential HVAC. Additional programs in the Commercial sector include the Commercial Direct-Install program and the HOPPs (High Opportunity Projects or Programs) Commercial Restaurant Retrofit program. IOU offerings also include local program elements such as third-party programs, Mid-Stream Water Heating Rebates, Commercial Direct Install, and local government partnerships that have close ties to Business Improvement Districts.

SCG3708 Commercial – Commercial Energy Advisor (CEA) Program

The Commercial Energy Advisor program brings together services that support customer education and participation in energy efficiency, and energy reducing opportunities and benefits, along with awareness of greenhouse gas and water conservation activities.

The CEA program was able to perform 167 audits through March 2020, after which customer contact with company personnel was halted indefinitely. However, starting in June 2020 the CEA program was able to resume audits through use of 3rd party contracted Energy Consultants, resulting in completion of 341 additional audits. This totaled 508 audits through 2020 (64.3% of goal, 508/790).

Customer contact with company personnel policies during the COVID-19 pandemic created challenges due to most audits being performed with internal resources. The CEA program was able to adapt through utilization of 3rd party contracted Energy Consultants to resume on site customer audits.

SoCalGas will continue to deliver audit reports and hold customers’ hands with the rebate application process. SoCalGas strives to be as a source for gas related Energy Efficiency solutions by providing: Financing options and bundled DSM offerings. The CEA program will strive to broaden and more effectively utilize 3rd party resources to continue customer audits in expectation of continuing customer contact restriction policies.

The CEA program met 64.3% of its goal, despite challenges faced during the COVID-19 pandemic.

SCG3710 Commercial – Calculated Incentives

The SoCalGas Commercial Calculated Incentives program offers financial incentives for customized new construction, retrofit and retro-commissioning energy efficiency projects. Incentives are paid on the energy savings for both existing baseline and above baseline energy performance, which include state-mandated codes, federal-mandated codes, industry accepted performance standards, or other baseline energy performance standards.

The Commercial Calculated Incentive has continued to leverage the process improvement implemented and meet all of the Custom Measure and Project Archive (CMPA) upload requirements.

SoCalGas participated and led the small project subgroup for the Custom Project Stakeholders Engagement process. The purpose of this subgroup to address barriers for commercial customers with small or very small projects to participate in the custom process.

The Commercial Calculated Incentive program continues to experience a decline. SoCalGas is anticipating that all the efforts of the CPR subgroups meetings, a path to increase projects because of clearer for the sector.

The Commercial Calculated continues to refine its process to ensure projects that do come through meet all the requirements for the CMPA submittal as Ready for Review

SCG3711 Commercial – Deemed Incentives

The Commercial Deemed Incentives Subprogram offers rebates to customers in an easy-to-use mechanism to offset the cost of off-the-shelf energy saving equipment to cost-effectively subsidize and encourage adoption of mass market efficiency measures through fixed incentive amounts per unit/measure.

In 2020, marketing outreach for both foodservice equipment vendors as well as non-foodservice equipment in conjunction with SoCalGas' TradePro directory continues to contribute to program participation.

Using itemized EE measures was intended to overcome barriers that prevent many business customers from adopting EE alternatives. The barriers were addressed by itemizing common EE measures and rebates, stimulating the supply of high efficiency equipment and products (through higher demand), and offering rebates that help offset higher start-up and down payment expenses for energy efficient retrofits.

By year-end 2020, a 50% kicker was made available to all commercial sector customers to offer monetary support as a response to the COVID-19 pandemic. As a result, the program saw a steady increase in program participation throughout the remainder of 2020.

Foodservice equipment and steam trap replacement were the primary measures for deemed energy savings in 2020 for the commercial sector.

SCG3712 Commercial – NonRes HVAC Upstream

The Commercial Heating, Ventilation, and Air Conditioning (HVAC) Program delivers a comprehensive set of midstream and upstream strategies that builds on existing programmatic, educational, and marketing efforts and leverages relationships within the HVAC industry to transform the market towards a sustainable, quality driven market.

The Upstream HVAC Equipment Incentive offers incentives to distributors who sell qualifying high-efficiency commercial HVAC equipment to increase the stocking and promotion of such equipment.

Throughout 2020, SoCalGas worked with the Statewide (SW) Investor-Owned Utility (IOU) HVAC program teams on improving elements of the commercial HVAC programs and plotted a course to meet the HVAC Long Term Strategic Plan.

In order to adapt to market forces, regulatory requirements, and the changing EE landscape, SoCalGas continued to evaluate and adjust elements of the program to further promote higher efficiency units. SoCalGas worked in conjunction with the IOUs SW team to review and align incentives for consistency and to achieve continuity across program offerings.

A key deliverable of the Program that has continued to be supported is the transition to an SDG&E SW led HVAC program that is being developed through the SW third-party solicitation process.

SCG3793 Commercial – Instant Rebates! Foodservice POS

The Instant Rebates! Point-of-Sale Foodservice Rebate (Instant Rebates) Program enables nonresidential SoCalGas end-use customers to receive point-of-sale (POS) rebates when they purchase eligible, high-efficiency equipment from participating dealers. Equipment dealers also receive a sales incentive for every piece of eligible high-efficiency equipment for which they submit an online rebate application. The Program implementer provides turnkey program implementation services to SoCalGas.

Despite the pandemic, the Instant Rebates program delivered more energy savings and customer rebates in 2020 than any other year in the Program's history. This was due to targeted and consistent program outreach throughout the shut-down periods, and to the 50% rebate promotion.

The Program provided 90% more customer rebate dollars and delivered 12% more savings in 2020 than in 2019.

The Program also continued to translate marketing materials to enhance the customer experience and increase program participation. Program materials are now available Spanish, Mandarin, and Korean at dealer locations.

The Instant Rebates Program faced many challenges in 2020 driven by the effects of COVID-19. The commercial foodservice (CFS) industry was, and still is, drastically disrupted by COVID-19-related shelter-in-place orders and shutdowns of dine-in and outdoor dining. Many foodservice establishments were required to move to a takeout-only model.

As a result, it is estimated that nearly 17% of all restaurants in the US have closed permanently or long-term across the country. Similarly, foodservice equipment dealers reduced hours, reduced staff, began working from home, downsized their companies, and/or have temporarily or permanently gone out of business. Market reports indicate that CFS equipment sales at the end of 2020 were down 20-30% across all sales channels and that used equipment sales may inhibit sales of new equipment for the foreseeable future.

Program participation decreased by approximately 90% in April due to California government shutdown orders issued in March 2020. Program participation recovered slowly, but unevenly from May through September as restaurants started to offer curbside pick-up and some limited in and outdoor dining as more stay-at-home orders were issued and lifted.

In accordance with updated California workpapers, the Program reduced deemed savings for 5 measures by an average of 34% in October. These measures included fryers, convection ovens, steamers, dishwashers, and rack ovens.

To increase program participation and energy savings, the Program offered customers a 50% rebate increase across all qualifying equipment for units purchased between October 1st and December 31st, 2020. Participating dealers were thrilled to offer customers the increased rebates and took advantage of the promotion by ordering additional stock of rebate-qualified items. The increased rebates allowed dealers to upsell high-efficiency units more easily, as customers were incentivized to purchase within the promotional period. As a result, participation rebounded dramatically in the fourth quarter.

In addition to the promotion, the Program transitioned to a new online application processing system in October. The new system utilizes a simplified application form, allows dealers to submit rebate claims for multiple programs through a single portal, provides a qualifying products list (QPL) lookup tool, and supplies participants with custom Program reporting capabilities. Additionally, claim status and dealer payments are available in real time on the system's dashboard.

The Program Implementer also launched a partnership with a popular CFS software platform in mid-2020. The Program's QPL has been integrated into the platform so that all users can see if a product is rebate eligible. There is also a link to a website where non-participating dealers can sign up to receive more information about the Program.

The Instant Rebates program achieved 97% of its energy savings goal and exceeded its 2020 disadvantaged business enterprise (DBE) spending commitment. Additionally, the Program exceeded its fourteen-day program payment goal, issuing dealer rebates in an average of 9 days from the application approval date. The Program implementer also enrolled eighteen new dealers to expand the program's geographical coverage and customer reach. Eighty-six dealer stores are currently enrolled in the Instant Rebates Program.

SCG3805 Commercial – Direct Install Program

The SoCalGas Commercial Direct Install Program is a cost-effective source of terms for SoCalGas through the installation of direct install energy efficiency measures to small and large commercial ratepayers. After the installation of complimentary direct install measures, the program segues to advanced energy efficiency co-pay measures that can be financed using SoCalGas's On-Bill Financing.

The program proved to be in high demand amongst retail, restaurant, and hospitality market segments throughout 2020 even with COVID-19; and the program was a SoCalGas portfolio high performer with a total resource cost (TRC) greater than 1.7. To keep up with the demand, the program contract was amended twice to increase the energy saving goals and the contract budget.

During the 4th quarter of 2020, the program designed an ASHRAE Level 1 audit tool to identify advanced energy efficiency appliance opportunities. Hundreds of commercial customers were surveyed and the interest in these appliances proved to be very strong. The implementer continues to work with these interested customers to sell and install advanced energy efficiency technologies in their facilities.

The authorization form was filled out incorrectly for a high quantity of customers served. The root cause was identified, and the implementer's IT revised the methodology for how the form fields were being populated and the issue was resolved.

The PY 2020 budget was amended to \$4,367,000 and the PY 2020 net therm savings goal was amended to 2,069,730. The program also was bifurcated into the Public Direct Install program with a separate budget and set of goals. Changes also included goals for advanced energy efficiency audits and projects completed.

The program achieved the net therm savings, gross therm savings, project installations and comprehensive projects assessments.

SCG3809 Commercial – AB793-CEMTL Program

The commercial lodging sector represents a significant contributor in terms of participation in Company's energy programs. Although the overall commercial lodging sector participates actively in Company's energy program, small and medium-sized commercial lodging customers do not employ an integrated whole building EMT approach when implementing energy efficiency in their establishments. A whole-building integration approach focuses on the overall building energy performance and usually involves installing a mix of energy-efficiency measures that interact together to reduce total energy consumption. Lodging facility operators may identify areas of cost reduction in their daily activities; however, there are missed opportunities to incorporate best practices in equipment operations and maintenance, staff behavior modifications, and energy efficiency upgrades applicable to the whole building. Lodging owners and operators typically only upgrade single room equipment and fail to observe the potential for integrated energy savings.

The CEMTL Program targets owners or lessors of existing, stand-alone, commercial lodging buildings—incentivizing customers to implement EMTs and whole-building measures. Through the CEMTL Program, customers will install EMT measures to capture behavior-based savings. In addition, customers will be able to proactively identify equipment problems prior to failure and apply integrated energy savings strategies through whole building approaches. By implementing this whole building approach, the SoCalGas CEMTL Program expects to achieve an average of a 10% reduction in the 5 projects which were implemented.

In 2020, CEMTL was forced to scale back outreach and marketing due to the COVID-19 Pandemic. One project was signed in 2020 before the hotel industry was saddled by the pandemic. The program was able to contact approximately 250 customers, resulting in 20 leads. These small hotels were provided free gas audits to determine what eligible Energy Efficiency Measures (EEM's) would best fit their property. While only one of these hotels enrolled in the program, that hotel did follow through in completing the install before the end of the year. Additionally, 4 other projects, which had signed Incentive Applications in 2019, started and completed energy efficiency projects in 2020. Two of these projects were also able to start M&V in 2020, with Willdan uploading energy and occupancy data to Energy360.

CEMTL had limitations from the outset, such as the program's only being available to customer using less than 50,000 therms annually. However, the defining issue for the year was the pandemic, which led to a steep decline in the hotel industry's occupancy rates and revenue. Consequently, the program faced challenges both in recruiting new enrollments and in retaining customer who had already been approved. Additionally, SoCalGas requested the program cease all in-person work from March 18 to June 1 and many hotels created their own guidelines which did not permit outside personnel on site. All of this presented a challenging environment for persuading hotels to make investments in saving energy.

There was a change order in 2020 which yielded a revision to the contract based on the anticipated reduced impact of the program. This reduced the program budget by \$703k. Additionally, the program's M&V plan was updated to reflect the various steps of exporting interval data from SoCalGas and uploading it into the Energy Management Technology, Energy360. Updates were also made to Energy Efficiency Collaboration Platform (EECP) and the way that measures are chosen and documented.

After extensive discussion about goals and expectations for 2020, given the context of shrunken hotel budgets due to the pandemic, Willdan set the expectation of having 5 projects installed before the end of the year. This goal was achieved with a diverse set of measures spanning the installed projects. Since this program requires that savings are measured and normalized through a one-year Measurement & Verification period, savings will not be realized until 2021, however, Willdan has already observed energy savings from implemented measures.

SCG3813 Commercial – Savings By Design

Savings by Design (SBD) promotes integrated design by providing owner incentives, design team incentives, and design assistance to participants who design spaces that perform at least 10% better than Title 24. SBD encourages energy-efficient building design and construction practices. SBD is offered in collaboration with SCE and LADWP in their respective shared territories. Within the joint SoCalGas/SCE territory, SCE acts as the lead utility and SoCalGas buys back therms associated with dual electric and gas projects.

The SBD program worked with other statewide implementors in developing an Ex-Ante Review Streamlining subgroup, the purpose of which is to evaluate a reasonable level of rigor for SBD projects.

The SBD program continues to see a drop in projects with claimable therms. This continued drop is due to the changes in the Energy Pro system.

The program was ramped down and closed at the end of 2020.

SCG3814 Commercial – Midstream Water Heating

The SoCalGas Midstream Water Heating Program encourages distributors to stock and sell qualifying energy efficient water heating products to contractors that provide services to SoCalGas nonresidential customers. The program provides a rebate to the distributor on qualifying energy efficient products sold by participating distributors at the point of sale. Distributors then pass the rebate to customers to drive sales and program participation. The distributor also receives an incentive for every eligible unit sold to cover their administrative expenses.

The implementer was brought on board in November 2018, and they launched the program in its current design in March 2019. The implementer led a targeted campaign to recruit qualified distributors into the program prior to launch. By year-end the implementer had enrolled and trained 27 unique distributor organizations associated with 107 different store locations. In the first three months, the program reported lower therms savings, with activity picking up at the end of Q2. By year-end, the program exceeded energy savings goals. Targeted outreach to Disadvantaged Communities (DAC) and Hard-to-Reach (HTR) markets led to an increased presence in both spaces. Of the total therms reported in 2019, 44% were in Disadvantaged Communities (DAC) and 53% were in Hard-to-Reach (HTR) markets.

In mid-2019, the California Energy Commission (CEC) updated its list of energy efficient products by re-categorizing water heaters into different lists. This resulted in a significant drop-off of products from the program's Qualified Product List (QPL). The implementer worked hand-in-hand with manufacturers to resubmit energy efficient products to the CEC to have them returned to program's qualified product list. As a result of these efforts, stakeholder levels of satisfaction and the program's energy savings were not impacted.

The implementer increased enrollment from the prior year, having enrolled and trained 41 unique distributor organizations associated with 120 different store locations. By year-end, the program met energy savings goals. Building off the success of 2019's campaign, the program once again targeted outreach to Disadvantaged Communities (DAC) and Hard-to-Reach (HTR) markets which once again led to increased presence in both spaces. Of the total therms reported in 2020, 51% were in Disadvantaged Communities (DAC) and 53% were in Hard-to-Reach (HTR) markets.

The implementer ran a contest, coined the Great Rebate Race, to engage distributors in a fun, friendly competition to help drive sales. The categories included rookie of the year for best performing new distributor, as well as prizes for the top 3 distributors for most therms saved and most products rebated. The prizes ranged from \$250 for Rookie of the Year and first place winners in the therms and products rebated, \$150 for second place in therms and products rebated, and \$100 for third place. The contest was well received by the distributors.

In 2020, the program achieved the following metrics:

The goal for therms saved was 772,000 and the program claimed 771,537 in therms savings. Customers received \$952,175 in incentives and distributors earned an incentive total of \$184,300.

The program earned a reputation for being organized, responsive, valuable, and timely. Contractors started requesting that their distributors participate in the program and distributors provided feedback that intimate account management support helped drive program engagement. In addition to exceeding (2019) and meeting (2020) therms goals, the program's account management team established a significant presence in the water heating distributor space.

In early 2021, the implementer offered an opportunity for distributors to provide input through an anonymous survey. The implementer sent this survey to 62 individual participants at 40 participating distributors. 9 questions were asked with a section for individual comments. The responses were overwhelmingly positive. 89% rated the support received from the program staff as excellent and 80% responded that they were either extremely satisfied or very satisfied with the SoCalGas Water Heater rebate program.

SCG3834 Commercial – Commercial LADWP Direct Install Program

The SoCalGas Commercial Los Angeles Department of Water and Power (LADWP) Direct Install Program establishes a relationship between third-party contractor(s) and the LADWP to enhance the program’s offerings of natural gas energy efficiency equipment. This program is available to small, medium, and large commercial sector customers. The Commercial LADWP Direct Install Program offers no-cost direct install measures.

The Commercial LADWP Direct Install Program completed joint SoCalGas and LADWP customer enrollments in the first quarter of 2020 which was a continuation of the establish partnership between the two utilities.

Due to the COVID-19 outbreak, the Commercial LADWP Direct Install Program activity was paused at the end of the first quarter of 2020. The program was inactive for the remainder of 2020.

The program was inactive as of the end of the first quarter of 2020 due to COVID-19.

In 2020, the Commercial LADWP Direct Install Program completed 19 customer enrollments and installations. It achieved 101 net therm savings.

SCG3835 Commercial – Commercial Pasadena Direct Install Program

The SoCalGas Commercial Pasadena Direct Install Program establishes a relationship between third-party contractors and the City of Pasadena Water & Power Company to enhance the program’s offerings of natural gas energy efficiency equipment. This program is available to small and medium commercial sector customers. The Commercial Pasadena Direct Install Program offers no-cost direct install measures.

This program was inactive throughout all of 2020.

SCG3882 Commercial – Small and Medium Commercial EE Program

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

The program start-up activities commenced in Q4 2020, which includes: Developing the program’s webpages; Participant eligibility screening; Marketing and outreach and enrollment; Customer education; Facility audits and technical assistance to Customers; Project scoping and procurement advice; Financial incentives/rebates; Inspection and verification of project results; Promotion of On-Bill Financing (“OBF”); Franklin Energy identified staffing for its Program Manager and first Energy Advisor; and SoCalGas delivered its first customer data file to Franklin team.

The implementation barriers and problems encountered were: Franklin Energy discovered the compensation workbook was missing several measures it intended to incentivize and initiated contract revisions with SoCalGas; 4-week approval process for marketing collateral pushed approvals into 2021; and Initial customer data file transfer was delayed until Dec 2020.

There were no program changes made in 2020.

The program objectives that were met are: Franklin Energy launched marketing campaign; and Franklin Energy began contractor outreach and identified 5 contractors who can contribute in 2021.

Industrial Energy Efficiency Programs

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

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

Financial incentives are based on deemed energy savings by per unit of equipment and calculated energy savings by per unit of energy.

The IEE Programs include four statewide subprogram elements that together comprise the core product and service offerings. Each IOU offers local programs that complement and enhance the core offerings in their region. The local portfolio mix of SoCalGas is specifically designed to enhance energy efficiency and demand-side management (DSM) opportunities for industrial customers, including financial solutions.

SCG3713 Industrial – Industrial Energy Advisor (IEA) Program

The Industrial Energy Advisor program brings together services that support customer education and participation in energy efficiency, and energy reducing opportunities and benefits, along with awareness of greenhouse gas and water conservation activities.

The IEA program was able to perform 35 audits through March 2020, after which customer contact with company personnel was halted indefinitely. Starting in June 2020 the IEA program was able to resume audits through use of 3rd party contracted Energy Consultants. However, the contracted consultants have specializations reliant on the performance of their unique industries. This resulted in an additional 2 audits performed by consultants, totaling 37 audits through 2020 (8.3% of goal, 37/445).

Customer contact with company personnel policies during the COVID-19 pandemic created challenges due to most audits being performed with internal resources. The IEA program was able to adapt through utilization of 3rd party contracted Energy Consultants to resume on site customer audits, however finding consultants effective at auditing industrial customers with specialization in gas applications is an on-going challenge.

SoCalGas will continue to deliver audit reports and hold customers' hands with the rebate application process. SoCalGas strives to be as a source for gas related Energy Efficiency solutions by providing: Financing options and bundled DSM offerings. The IEA program will strive to broaden the industry specializations of and more effectively utilize 3rd party resources to continue customer audits in expectation of continuing customer contact restriction policies.

The IEA program met 8.3% of its goal (37/445), with performance greatly hindered by the challenges faced during the COVID-19 pandemic.

SCG3714 Industrial – SEM

The Industrial Strategic Energy Management (SEM) Program engages cohorts of large industrial customers in two-year cycles to drive persistent energy savings across an entire facility. Specifically, the program includes a full spectrum of services: Cohort workshops; On-site "Energy Treasure Hunts" to identify, track, and prioritize energy saving opportunities; On-site and remote support for: goal development, employee engagement, energy data collection, project savings, and persistence strategies; and Implementation of an "Energy Management System Assessment" to assess progress on each participant's management approach and to plan future improvements.

Energy savings opportunities in the SEM program include low-cost behavioral, retro-commissioning, and operational (BRO) measures as well as capital projects. The program measures savings at the meter level, using a normalized regression model that accounts for factors such as production volume and weather, which affect energy consumption. Customers receive incentives for BRO measures, for capital projects, and for achieving key milestones. This program complies with the California Industrial SEM Design Guide and the California Industrial SEM Measurement and Verification (M&V) Guide (updated in 2020), which have been accepted by the California Public Utilities Commission.

The program wrapped up the first two-year cycle of the initial SEM cohort on July 31. The majority of participants continued into the second two-year cycle. A second cohort completed its first program year on December 31. Participants generated all of their savings so far through BRO measures, such as: Tune boilers to reduce excess O₂; Increase absorption chiller setpoint; Improve process control to maximize productivity of furnace; and Upgrade kiln feed controls. One participant saved more than 25% of their gas use in one year of the program by switching production exhaust to their most efficient thermal oxidizers. Participants in both cohorts generated more than 900 energy savings projects since the beginning of the program, or more than 70 projects per site. More than 240 projects were completed by the end of the calendar year. The combined BRO energy savings for the two cohorts was approximately 469,600 therms. The program developed a pipeline of SEM-influenced custom capital projects that are moving through the standard custom process.

These first two cohorts in the program were jointly funded with SCE. In Q4 2020, the program began recruitment for a gas-only cohort to be launched in 2021.

Program implementation was dominated by the COVID-19 outbreak. In Q2, 2020, the program shifted all activities online, including workshops, treasure hunts, and site check-ins. All participants were deemed essential businesses and continued to operate, so it was possible to find and complete savings projects despite the challenges. The program team itself adapted quickly to COVID-19 restrictions and did not miss any deadlines during 2020.

Program staff, the implementer, and third-party reviewers streamlined all aspects of administration in 2020, including recruitment, onboarding, reporting, and measurement & verification (M&V). For example, the program shaved two months off the end-of-year reporting process.

Despite the interruptions of COVID-19, the program met key objectives: Generate substantial BRO savings from a variety of gas-using equipment; Show persistence of savings from year one to year two; Improve evaluation procedures and policies; Improve administrative processes; and Improve relationships between customers and their SoCalGas account executives.

SCG3715 Industrial – Calculated Incentives

The SoCalGas Industrial Calculated Incentive program offers incentives for customized energy efficient projects. This program covers new construction, retrofit and retro-commissioning energy efficiency projects. Incentives are paid on the energy savings above and beyond baseline energy performance, which include state-mandated codes, federal-mandated codes, industry accepted performance standards, or the other baseline energy performance standards.

The Industrial Calculated Incentive program continued to use process put into place 2019 which led to the program meeting the requirements upload selected projects in 2020. SoCalGas participated in the large project subgroup which effects all the industrial projects. Worked on efforts to streamline process to evaluate and process these large projects.

The program did experience projects possible higher savings even though the number application remained relatively the same.

The Industrial Calculated Incentive program did not make any changes in 2020.

SCG3716 Industrial – Deemed Incentives

The Statewide Industrial Deemed Energy Efficiency subprogram provides services to improve the energy efficiency of industrial facilities in California, including offering financial incentives based on deemed energy savings. The energy savings are deemed for measures installed. The program is part of a suite of programs within the Statewide Industrial Energy Efficiency Program. It also features rebates per unit measure for installed energy-saving projects and provides the IOU, equipment vendors, and customers an easy-to-use mechanism to cost effectively subsidize and encourage adoption of mass market efficiency measures through fixed incentive amounts. The subprogram also offers rebates to customers in an easy-to-use manner to offset the cost of off-the-shelf energy saving equipment.

The Industrial Deemed Energy Efficiency Program directly addressed key market factors that led to higher energy costs for California businesses. By providing a menu of prescribed common measures, this simplified the process of reviewing project proposals and provided a per EE measure rebate that reduced the cost of retrofitting outdated and inefficient equipment. This element made it attractive for customers to spend money in the short run to achieve lower energy costs in the long run.

Using itemized EE measures was intended to overcome barriers that prevent many business customers from adopting EE alternatives. The barriers were addressed by itemizing common EE measures and rebates, stimulating the supply of high efficiency equipment and products (through higher demand), and offering rebates that help offset higher start-up and down payment expenses for energy efficient retrofits.

In 2020, marketing outreach in conjunction with SoCalGas' TradePro directory continues to contribute to program participation. Commercial hot water and steam process boiler measures were the focus for deemed energy savings in 2020 for the industrial sector.

By year-end 2020, a 50% kicker was made available to all commercial sector customers to offer monetary support as a response to the COVID-19 pandemic. As a result, the program saw a steady increase in program participation throughout the remainder of 2020.

SCG3757 Industrial – Small Industrial Facility Upgrades

The Small Industrial Facility Upgrades Program (SIFU) is implemented by CLEARResult Consulting Inc. SIFU assists Southern California Gas Company (SoCalGas) industrial customers across all sizes and industrial segments in becoming more energy efficient and productive through the implementation of efficient technologies and processes. It is designed to help industrial customers reduce their energy consumption by providing an incentive to invest in energy efficiency measures. SIFU offers proven measures currently used in SoCalGas's Energy

Efficiency Calculated Incentive Program (EECIP) and Energy Efficiency Rebates for Business (EERB) program. These measures include calculated custom process improvements as well as deemed measures and include measures and technologies with low market penetration.

The Program is managed by CLEAResult, whose expertise in California energy markets, extensive experience in finding and delivering energy savings, and thorough understanding of SoCalGas' programs helps ensure that customers maximize the benefits of efficiency initiatives and program participation.

Over the last year marketing activities included customer introductions led by SoCalGas Account Executives, and follow-ups with end-use customers. SIFU focused last year on the existing pipeline and developing new projects with customer and Account Executive meetings by infusing a stronger outreach element into SIFU's activities. Field visits included pre- and post-inspection activities as well as customer education on program benefits, rule changes and potential opportunities.

The Program encountered multiple challenges in 2020, with COVID-19 being at the forefront. Some of the COVID-19-related obstacles included access restrictions on site visits during the initial phase of the shut-down, customer furloughs, budget restraints due to shifting priorities, and equipment delays from manufacturers.

CLEAResult continues to expend great efforts to develop and maintain customer engagement compensating for challenges in identifying and providing acceptable, available documentation for custom project influence, baseline determinations and free ridership screening. Increased scrutiny and screening of project and service requests are applied in order to reduce resource expense on activities that do not yield energy savings. This includes focused program resources in regions that have high potential for energy savings.

SIFU follows any changes made to process, eligible measures, documentation requirements, etc. per SoCalGas program and policy guidance. Due to the increased scrutiny of energy savings eligibility and complexity of the CPUC Energy Division review process, CLEAResult will apply a higher degree of screening for customer requests and projects in order to achieve contractual mandates for program cost effectiveness and appropriate use of rate payer funds. Communication with SoCalGas is to ensure expectations are properly set around program service offering.

SIFU successfully engaged customers, maintained and progressed projects from the pipeline through to the fully installed phase, and paid customer incentives based on the completed projects. Additionally, CLEAResult is actively managing SIFU pipeline, both by maintaining existing reserved projects and by continuing to develop and reserve new projects, positioning SIFU for success in 2021.

Agricultural Energy Efficiency Programs

The Agricultural Energy Efficiency (AEE) Program facilitates the delivery of integrated energy management solutions to California's agricultural customers. The program offers a suite of products and services, such as strategic energy planning support, technical support services,

facility audits, pump tests, calculation/design assistance, financing options, and financial support through rebates and incentives. In addition, the program adopts and supports the strategies and actions of the Agricultural and Industrial chapters of the CLTEESP and the energy efficiency business plan.

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

SCG3717 Agricultural – Agricultural Energy Advisor (AEA) Program

The Agricultural Energy Advisor program brings together services that support customer education and participation in energy efficiency, and energy reducing opportunities and benefits, along with awareness of greenhouse gas and water conservation activities.

The AEA program did not meet its yearly audit goals of 65 customers visits, accomplishing 1 audit in 2020.

The seasonal application of natural gas equipment for the agricultural sector continues to be a barrier on rate of return, and timing. Sector driven flexibility from governing bodies would help engage the agricultural community by providing leniency on custom project implementation and extending their respective ISP (industry standard practice) implementation. Customers are reluctant to act and commit to energy efficiency if not persuaded by any other enforcement than simply being energy efficient. Although air quality agencies provide a beneficial support to equipment upgrade, the proportionality between combustion efficiency and energy efficiency prevent the choosing of an energy efficient option. Along with these existing barriers, customer contact with company personnel policies during the COVID-19 pandemic created challenges due to most audits being performed with internal resources. Furthermore, finding 3rd party contracted Energy Consultants with specialization in gas applications in agriculture has proven to be difficult, resulting in the halt of all agricultural audits entirely.

SoCalGas will continue to deliver audit reports to the customer and strive to be as a source for gas related Energy Efficiency solutions by providing: Financing options and bundled DSM offerings. The AEA program will strive to find new ways to perform audits for agricultural customers in expectation of continuing customer contact restriction policies.

The AEA program met 1.5% of its audit goal (1/65), with performance greatly hindered by the challenges faced during the COVID-19 pandemic.

SCG3719 Agricultural – Calculated Incentives

The SoCalGas Agricultural Calculated Incentive program offers incentives through a customized approach for energy efficiency. This program covers new construction, retrofit and retro-commissioning energy efficiency projects. Incentives are paid on the energy savings above and beyond baseline energy performance, which include state-mandated codes, federal-mandated codes, industry accepted performance standards, or the other baseline energy performance standards.

The Agricultural Calculated Incentive program continues to use a process refined in 2019 to meet the required deadlines for selected projects. The Agricultural Calculated Incentive program continued to participate in the statewide subgroups to streamline the custom process.

The Agricultural Calculated Incentive program had no new enrollments in 2020. SoCalGas continues to look at Behavioral, Retro-Commissioning, and Operational (BRO) measures as a way to bring projects into 2021.

The Agricultural Calculated Incentive did not have any program changes in 2020.

SCG3720 Agricultural – Deemed Incentives

The Agricultural Deemed Incentive Subprogram offers rebates to customers in an easy-to-use mechanism to offset the cost of off-the-shelf energy saving equipment.

The program kept focus on replacing existing energy efficient natural gas equipment and encouraging customers to move up to higher-than-standard efficiency models when purchasing additional equipment. The deemed rebate offering provided utility representatives, equipment vendors, and customers an easy-to-use mechanism to cost-effectively subsidize and encourage adoption of mass market efficiency measures through fixed incentive amounts per unit or measure. The program also coordinated its activities with SoCalGas account executives and Commercial and Industrial service technicians to present energy efficiency program details to their customers.

By year-end 2020, a 50% kicker was made available to all commercial sector customers to offer monetary support as a response to the COVID-19 pandemic. As a result, the program saw a steady increase in program participation throughout the remainder of 2020. Greenhouse curtains and pipe insulation measures were the focus for deemed energy savings in 2020 for the agricultural sector.

Statewide Emerging Technologies Program

The Statewide Emerging Technologies Program (ETP) supports the California Investor-Owned Utility (IOU) Energy Efficiency (EE) programs and helps California meet its energy reduction goals by identifying and screening potential technologies, assessing them to validate performance and customer acceptance, performing in-situ demonstrations, gathering actionable information for use by EE programs and publishing the results of these activities. Well performing technology is recommended for inclusion in IOU customer education and rebate

programs for wide use by utility customers. The information below summarizes key activities across all three subprograms: Technology Development Support, Technology Assessment Support and Technology Implementation Support. Note that SoCalGas ETP is currently transitioning to a SW Gas Emerging Technologies Program, which replaces these three subprograms.

ETP worked closely with EE program managers and programs engineering to initiate two significant field demonstration programs to support technology introduction. (Technology Introduction Support)

- Combi System Technology Introduction – in collaboration with builder, manufacturers, contractors, and customers, program managers demonstrate high efficiency combination heating and water heating in single family residence new construction. This technology became a measure in 2020 with support from ETP projects completed 2019/2020. This demonstration project intends to provide information to the stakeholders about the products, the distribution chain, design and installation needs and any barriers to adoption, so to inform program managers on program design.
- Advanced Fryer Technology Introduction – in collaboration with program managers, demonstrate the benefits of new, highly efficient, advanced fryer technologies for commercial food service. Program managers identified a need to reassess and possibly adjust existing measure incentives. This demonstration will be performed at several restaurants and seeks to identify and measure all customer benefits that would drive adoption, e.g., increased oil savings, improved food quality, kitchen environment improvements.)

Completed 2 assessments in coordination with customer programs managers and customer programs engineering and engaged in other technology assessment support activities (Technology Assessment Support)

- Heat Recovery Ventilation for Single Family Residences – a paper study in collaboration with Customer Programs engineering that built on a prior CEC project assessing energy efficiency of HRV. Driven by interest in improving indoor air quality during the pandemic with fewer detriments to home energy efficiency.
- Hydronic heating heat transfer improvement additive – a laboratory study testing efficiency improvements of a liquid additive in use in other parts of the U.S. and UK.
- Collaborated with IOU and non-IOU partners in scanning a wide variety of sources for assessment candidates. Identified, screened, and prioritized technologies or strategies for TA.
- Engaged the various EE programs and other program stakeholders.
- Coordinated intake ideas and assessments and shared technology information through the virtual ET Summit 2020 and coordinated webinars with the Emerging Technologies Coordinating Council (ETCC) on various topics for the commercial building, industrial, agricultural, and residential sectors.

Completed the following activities to provide assistance to private industry and technology actors in developing or improving technologies and communicating utility program needs. (Technology Development Support)

- Collaborated with industry directly and through partners such as the Gas Technology Institute Emerging Technologies Program, Consortium for Energy Efficiency Emerging Technologies Consortium, American Council for an Energy Efficient Economy (ACEEE), American Society of Heating, Refrigeration and Air-Conditioning Engineers (ASHRAE), Association of Energy Engineers (AEE), among others.
- Collaborated with innovators from universities and other research institutions.
- Supported early-stage companies through SW ETP membership in the California Institute of Technology (Caltech) Rocket Fund program.
- Continued ongoing relationships with technology developers and manufacturers interested in developing or refining products of value to the energy efficiency programs and customers.

Provided support and input to Programs Engineering for potential high value savings measure workpaper development and identification of need for further ETP assessments or demonstrations:

- Warm mix Asphalt
- Venturi Steam Traps
- Combi System Using High Efficiency Tankless Water Heater for Single Family Residences
- Steam Tables for Commercial Food Services

ETP completed the following outreach activities:

- In collaboration with ETCC leadership and partners, the Statewide ETP program successfully conducted a virtual ET Summit 2020, which attracted over 300 registrants and over 200 attendees over two days.
- Collaborated with the ETCC on ETCC website management and capabilities, as the site is critical for communicating ET project results and outreach events, primarily for the benefit of program designers and administrators and technology actors.
- Published a technical paper on the 3-year results of a commercial NZE community recreation facility demonstration in the 2020 ACEEE Summer Study as well as in the International Journal of Energy Management.

Other notable ETP results include:

- Enhanced the ETCC Website to facilitate project activity searches.
- SoCalGas, the lead Program Administrator (PA) for SW Gas ETP, completed its third-party solicitation for a SW Implementer, choosing the contractor with whom to begin contract negotiations in 2021. SoCalGas prepared its Request for Abstracts

(RFA) and Request for Proposals (RFP) in collaboration and coordination with the electric SW lead PA Southern California Edison and the non-lead funding PAs PG&E and SDG&E (as directed by the statewide EE program solicitation Program Review Group.)

Likely due to pandemic restrictions, ETP encountered delays in ongoing projects and the start of new projects and noted reductions in new technology identification and intake likely due to cancellation of or transition to online trade shows and associated technology showcases. Despite these impacts, ETP was able to initiate and complete high value projects, communicating project results, supporting technology transfer, and supporting technology development by working closely (though remotely) with program managers, technology actors and industry groups.

No program changes were made in 2020.

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

Statewide Codes & Standards Program

Codes and Standards

The Codes and Standards (C&S) Program saves energy on behalf of ratepayers by collaborating with regulatory bodies, such as the California Energy Commission (Energy Commission) and the U.S. Department of Energy (DOE), to strengthen existing Energy Efficiency (EE) regulations as well as develop new EE regulations. The C&S Program conducts efforts to increase compliance with EE regulations to ensure that the State realizes the savings from codes and standards and supports local governments that include reach codes as a climate strategy. SoCalGas also conducts planning and coordination with other IOUs to optimize collaboration as well as conducting code readiness activities to address data gaps and needs for future C&S activities.

Program advocacy and compliance improvement activities extend to virtually all new constructed or renovated buildings and appliances sold in California in support of the California's ambitious climate and energy goals.

2020 Key Initiatives include:

- Advocacy for new or updated sections of California's Energy Code and related American Society of Heating Refrigeration and Air-Conditioning Engineers (ASHRAE) and the International Energy Conservation Code (IECC) activities;⁵
- Advocacy for new or updated sections of California's Title 20 Appliance Efficiency Regulations (Title 20) and DOE appliance standards, and related ENERGY STAR activities.
- Training, tools, and resources to support compliance with California's existing EE regulations

⁵ ASHRAE is the American Society of Heating, Refrigerating and Air-Conditioning Engineers. ICC is the International Code Council.

- Development of new cost-effectiveness studies to support local government reach codes.
- Long-term planning and coordination activities to optimize work across California’s utilities; and code readiness activities aimed at specific industries and technologies for future code cycles.

Codes and Standards Subprograms

State Building Codes Advocacy: Title 24, Part 6 & Part 11

The State Building Codes Advocacy subprogram supports the California Energy Commission’s triennial update to the Energy Code (Title 24, Part 6) to include new EE regulations or to strengthen existing regulations for various technologies or measures. Advocacy activities include the development of Codes and Standards Enhancement (CASE) proposals, research to provide the data needed to advance EE regulations, and participation in the public rulemaking processes. The subprogram also supports the Energy Commission in preparing recommendations to the Building Standards Commission to update the California Green Buildings Standards (Title 24, Part 11 or CALGreen). The energy measures in CALGreen provide foundational elements for local reach codes.

In accordance with D.18-05-041, SoCalGas’ continued role as a participating program administrator of the Building Codes & Compliance Advocacy Program is to transfer funds to the statewide codes and standards lead for program implementation.⁶

State Appliance Standards Advocacy Subprogram

The State Appliance Standards Advocacy (ASA) subprogram targets improvements to Title 20 by the California Energy Commission. Advocacy activities include developing Title 20 code enhancement proposals, participating in the California Energy Commission public rulemaking process and ASHRAE committees, collecting data to support IOU positions, submitting comment letters in federal standards proceedings, and participating in direct negotiations with industry. Additionally, the subprogram monitors state and federal legislation and intervenes, as appropriate.

In accordance with D.18-05-041, SoCalGas’ continued role as a participating program administrator of the Appliance Standards Advocacy Program is to transfer funds to the statewide codes and standards lead for program implementation.

Compliance Improvement Subprogram

This Statewide C&S sub-program supports increased compliance with adopted Title 24, Part 6, Title 20, and federal EE regulations. The C&S Compliance Improvement (CI) subprogram targets market actors throughout the entire compliance chain, providing education, outreach, and technical support and resources to improve compliance with Title 24, Part 6, and Title 20. CI

⁶ Cite to decision

subprogram activities complement other C&S subprogram work by maximizing persistent savings from C&S advocacy activities.

The program reached more than 3,900 students and achieved a 97 percent satisfaction rate and a 27 percent knowledge swing, on average. While continuing to deliver training, the program facilitated updating the curriculum, online tools, and resource library.

- Delivered 23 Decoding Talk sessions reaching 580 people
- Provided help through our YouTube channel. Code and Coffee videos received more than 7,500 views and forms tutorials received 4,117 views.
- Delivered training on the new healthcare standards to OSHPD and AIA.
- Worked with the CEC to launch the new dynamic non-res compliance forms. Moved all Title 24, Part 6 compliance forms from CEC site to EnergyCodeAce.com and developed annotated forms and videos designed to help industry use the new forms.
- Updated and began administering 2019 CEA exams. Launched CEA mentoring program with CABEC.

Program Implementation Barriers or Problems Encountered:

Due to COVID-19, in person instruction and outreach could not be executed.

Energy Code Ace portfolio of training, tools and resources was updated for 2019 requirements and available to the building industry on the 2019 Title 24, Part 6 effective date 1/1/20.

- In March, in response to the pandemic, traditional courses were converted to virtual class format.
- In 2020, the C&S SW sub-program delivered more than 130 classes delivered primarily via Adobe Connect due to COVID-19

Reach Codes Subprogram

The Statewide C&S Reach Codes (RC) subprogram provides technical support to local governments that wish to adopt local energy ordinances (reach codes) that exceed statewide Title 24, Part 6 minimum requirements for new buildings, additions, or alterations. Reach codes support for local governments includes:

- Conducting research and analysis to establish performance levels and cost effectiveness relative to fundamental Title 24, Part 6 requirements by climate zone
- Drafting model ordinance templates to encourage regional consistency
- Assistance completing and expediting the application process required for approval by the Energy Commission
- Supporting ordinance implementation once effective

When the 2019 Energy Code became effective on January 1, 2020, seven jurisdictions had already completed the CEC approval process for reach codes based on the 2019 Residential and Nonresidential New Construction Cost-Effectiveness reports prepared by the program. Achieving early approval resulted in the effective dates for the reach code aligning with the rest of the building code. In 2019, 20 additional ordinances passed through the city council adoption process, with 22 more in 2020 for a total of 43 by year-end. 26 of the 43 ordinances amended the energy code and received Energy Commission approval. One jurisdiction, the Town of Windsor, has since rescinded its ordinance in response to a lawsuit filed by a local developer. The Town determined that because of the pandemic, funds used to defend the ordinance against the lawsuit would be better spent on other priorities.

Direct Technical Support

Cost-effectiveness Studies

In addition to the three cost-effectiveness studies completed in 2019, the IOUs shared resources to complete the Mid-rise Multifamily New Construction study, and began work on several additional studies: High-rise Multifamily New Construction, Detached ADUs, Residential Retrofits and Electrification, Large Offices, Hotel Laundry and Restaurants (including Commercial Kitchen Equipment), Nonresidential Retrofits and Electrification, Replacing space or water heating with heat pump when purchasing PV system, and Battery Storage. In addition, the Program completed analyses for several individual jurisdictions documenting the results using the local utility rates, including Piedmont, SMUD, San Jose, Truckee, Palo Alto, Los Angeles, and Alameda.

Several reach codes were adopted in 2020 and approved by the Energy Commission based on IOU cost-effectiveness studies. Approved local ordinances may be found on the LocalEnergyCodes.com and Energy Commission websites⁷.

Supporting Documents

In addition to developing new cost-effectiveness reports, the RC program, independently and in collaboration with other organizations, supported reach code adoption by creating supplemental support documents. Beginning from a common core helps to support consistent code language across jurisdictions with similar objectives. Supporting documents completed in 2020 include:

- Model Ordinance Language
- Compliance Checklists
- Reach Codes training
- CEC Cover Letters
- Reach Code Options and a
- Reach Codes Primer

Cost-effectiveness Explorer

⁷ Approved local ordinances can be found at <https://www.energy.ca.gov/programs-and-topics/programs/building-energy-efficiency-standards/2019-building-energy-efficiency-3>

The Energy Code is complex and many people responsible for adopting reach codes do not work with the code regularly. In addition, there are many components to both the economic and technical analyses that can be difficult to understand for a layperson. Although the c/e studies are required and provide all data sorted by climate zone, it can still be challenging to identify the appropriate data for an individual jurisdiction. The C/E Explorer simplifies the process, allowing to easily select and view only the jurisdiction-specific, relevant results for specific policy options of interest.

Phase 1 of the Explorer launched in October 2020 and allows users to easily access results for their jurisdiction, and format, share or download a report documenting the results.

Resources, Communications and Events

Due to COVID-19, in person training and outreach could not be executed.

LocalEnergyCodes.com Website Refresh- Local interest in reach codes has continued to accelerate throughout 2020, fueled by the desire to decarbonize the building sector. As jurisdictions began expanding the scope of ordinances beyond Title 24, Part 6, they looked to a more diverse community for information. To support improved outreach efforts to remain a trusted resource in this growing area, the Reach Codes Program completed a refresh of the program web site. Throughout the year, site subscribers grew approximately 10%, from 360 to 397 subscribers. The refresh included restructuring the content to lead a user through the initial decision-making process, beginning with basic information about reach codes and selecting a “Reach Code Path” from five categories (Building Efficiency/Renewables, Electric Readiness, Energy Plus Water, Information Disclosure and Process Loads). Each “Path” lists several ordinance options, the pros and cons of each, and lists cost-effectiveness studies and other documentation supporting adoption and implementation.

The team continues to develop its social media presence and maintains a Twitter account to which the Program posts content two to three times weekly. The CA Local Energy Codes (@ca_codes) page continues to grow and now has 76 followers.

Planning and Coordination Subprogram

The planning element of this subprogram includes long-term planning and scenario analyses, modeling of impacts from potential C&S program activities relative to California policy goals and incentive programs, development of business and implementation plans, responses to CPUC and other data requests, updating the incremental measure costs for C&S measures, and maintenance of a C&S savings database consistent with evaluation protocols.

The coordination element includes internal and external harmonization with other groups. Internal activities have traditionally included collaboration with several departments: a) incentive, training, and DR programs; b) policy, regulatory, and corporate affairs; and c) emerging technology and product teams.

Since codes and standards impact the entire state and almost all building types, occupancy categories, and related technologies, external harmonization activities encompass: 1) California

Public Utilities Commission, California Energy Commission, Air Resources Board, 2) other IOUs, municipal utilities, and utilities in other states, 3) national advocates such as the Appliance Standards Awareness Project (ASAP), Natural Resources Defense Council (NRDC), Northwest Energy Efficiency Alliance (NEEA), Sierra Club, American Council for and Energy-Efficient Economy (ACEEE), Earthjustice, National Consumer Law Center, Consumer Federation of America, 4) representatives of various manufacturing companies and industry groups such as the Association of Home Appliance Manufacturers (AHAM), Consumer Technology Association (CTA), NEMA, Air-Conditioning, Heating and Refrigeration Institute (AHRI), American Gas Association (AGA), and 5) water utilities and local governments, and 6) other parts of the compliance improvement supply chain: building inspectors, Title 24 consultants, Contractor State Licensing Board (CSLB), and others.

With the current absence of a formal Zero Net Energy subprogram, the C&S Planning and Coordination subprogram has taken a lead role for coordinating the various EE aspects necessary to effectively support customers and the building industry to meet the state's ZNE goals. The ZNE effort is not only limited to the Energy Code, schools (Prop 39), and the design and construction industry's efforts to meet the various ZNE goals.

Due to COVID-19, in person meetings could not be executed.

Statewide Workforce Education & Training (WE&T) Program

SCG3729 WE&T – Integrated Energy Efficiency Training

The Statewide Workforce Education and Training (WE&T) Program represents a portfolio of education, training, and collaborative engagement between the Investor-Owned Utilities (IOUs): Southern California Gas (SoCalGas), Pacific Gas and Electric (PG&E), Southern California Edison (SCE), San Diego Gas & Electric (SDG&E) and other stakeholders involved in energy education and training. SoCalGas WE&T targets an audience of incumbent workers and new workers entering the workforce through technical upskill and core energy education.

Additionally, K-12 students are exposed to green careers, energy education and STEM-related topics. The focus on these audiences will prepare a workforce for the new challenges of increased energy savings goals in California.

SoCalGas Integrated Energy Efficiency Training (IEET) continued providing relative industry related trainings to attract audiences representing various occupations, allowing immediate application of knowledge gained to trades & professions and defining the value of the SoCalGas IEET program portfolio. During 2020, SoCalGas WE&T - IEET conducted 129 seminar/webinar/training sessions, 248 outreach consultations, and 58 equipment demonstrations. In order to adapt to the immediate unforeseen challenges resulting from immediate adoption of COVID-19 protocols, WE&T adapted a range of delivery platforms to achieve transition from prohibited in-person seminars to online webinar delivery to continue providing learning resources to our customers. Additionally, WE&T collaborated with the various IOUs to share online workshops & training resources that provided value to their prospective audiences.

The immediate mandate to transition from majority in-person seminars to online learning, primarily through webinars required evaluation of various market platforms for immediate delivery of content, long-term effectiveness, ease of access, user friendly experience & cost. Upon selection of an appropriate platform the on-going challenge is to effectively integrate prior methods of capturing & documenting results. To achieve this requirement continuous improvement & development of best practices continue to be developed & implemented into the operation of the new platform.

SoCalGas Integrated Energy Efficiency Training evaluated its' HVAC/R portfolio industry classes for delivery utilizing the new platform. The online delivery required close evaluation of prior offerings since the industry also delivered highly demanded hands-on training sessions as part of its portfolio. To address the concern of non-availability under current conditions, the development of an on-demand recorded session is under development to address the issue with plans to return to the in-person sessions when conditions permit. The training is important to new and incumbent workers in efforts to achieving industry certifications which include HVAC/R Support Training and North American Technician Excellence (NATE) certification courses and exam requirements. The SoCalGas' WE&T team collaborated with the SoCal Regional Energy Networks (SoCalREN) to deliver online workshops & skill enhancing green building virtual boot camp to HVAC contractors.

SoCalGas Integrated Energy Efficiency Training delivered high value in-person seminars in the first quarter of 2020 & effectively adapted due to unforeseen events & circumstances to continue delivering quality webinars, consultations & demonstrations throughout the year. As in previous years, the events delivered quality informative course material designed to address gaps in new & incumbent workers & industry educational needs. Examples: Building Operator Certification (BOC) training for commercial building operators, Building Science, Distributed Energy Resources (Combined Heat & Power), Boiler Maintenance & Boiler Water Treatment seminars/webinars emphasizing compliance with building code design, energy-efficiency, and resource conservation.

SCG3760 WE&T – HERS Rater Training Advancement

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

This program is implemented by CLEARresult.

In 2020, the Program worked to adapt its delivery to address the health and safety mandates required by local and state governments in response to COVID-19. Working in collaboration with our training sub-contractor, Wollin Group, we quickly developed online versions of the

most popular Program curriculum. Additionally, we changed the Program website to promote the new, online streaming classes to our existing partners and registered past participants to ensure that Program changes were communicated. In cooperation with SoCalGas, funds were shifted within Direct Implementation to support the changes in curriculum by reducing number of classes from 30 to 28. These collaborative efforts succeeded, and production goals were met in 2020.

28 classes were delivered in 2020. While 30 classes had been originally scheduled, the budgeted funds were shifted from class delivery to curriculum development. This represented a reduction of 2 classes from the original goal. 669 students attended classes over the year with an attendee average of 22.3 students per class (an increase of almost 4 students per class over 2019). The Program continued to deliver strong attendance for most classes.

DBE spending remained strong with a yearly average of 24.1%. This demonstrates the continued commitment to working with DBE vendors, whenever possible, in order to align with SoCalGas overall goals. 2020 DBE spend exceeded 25% during three months of the year. The highest monthly DBE spend (41.6%) occurred in August.

The Program website, www.advancedratertraining.com, which received a few updates through the year, provided a reliable and secure internet marketing presence in 2020. Images from actual trainings reflect an authentic representation of the on-site classroom experience on the landing page.

Cross-marketing of classes with venue partners and other SoCalGas programs increased awareness and enrollment during the year. Marketing efforts included phone outreach for classes, augmented e-mail marketing efforts through the website and online enrollments. While the website remains the Program hub for marketing and enrollments, interaction with potential students and their employers through phone outreach and e-mail has continued to prove highly valuable in recruiting students and gaining support for the Program. This type of outreach provides timely information, awareness, and Program visibility at a highly effective level. Changing the Program format to online, streaming classes allowed us to overcome some of the usual barriers faced during in-person classes and provided students with an easily accessible option. The complications of travel obstacles due to weather or traffic are eliminated in the online environment.

2020 implementation barriers were unprecedented due to COVID-19 regulations. Launching an online, streaming learning environment was accomplished in less than one month. Adapting existing curriculum to the new, instructional format was successful. Rotating the highest demand classes worked to achieve high registration and strong attendance for most classes. Despite predictable attrition rates for classes, registrant's information was captured to market future classes to encourage attendance for those who missed.

Using previous year approaches that focus on working with organizations and venues improved enrollment.

In one case, the Program offered a “hybrid” class where students attended both on-site, in classroom adhering to health and safety protocols AND online. The on-site instructor affiliated with the technical school set up a front-of-the classroom connection to the online instruction. Other students affiliated with the technical school attended remotely. The Q&A session at the end of the class was a collaborative effort between the online trainer and the classroom instructor. The Program’s strong relationship with technical school partners has become an integral strategy in keeping enrollment numbers strong during this period.

Direct marketing to distributors, technical schools, and businesses to improve awareness and information regarding training opportunities included some cross-marketing efforts with other SoCalGas efficiency programs, most significantly, the SoCalGas Commercial Water Heater Rebate Program.

A complete shift to online, streaming instruction was implemented quickly to preserve class delivery and curriculum development. All on-site, in classroom instruction was shifted to the new format to comply with health and safety protocols on the corporate, local, and state levels starting with March classes and continuing through year-end.

Program objectives were met and/or exceeded in 2020. Costs were kept within budget and additional efficiencies were achieved to keep the Program operating in a steady fashion despite delivery obstacles.

2020 Program Stats	
Total Number of Classes in 2020	28* classes (goal met)
Average Number of Students per Class	22.3 students (goal exceeded)
DBE Yearly Spend	24.1%**

*Overall class goal of 30 was reduced to 28 classes to accommodate fund shift to online curriculum development.

**DBE Spend = The Diversity Business Enterprise (DBE) hiring goal established by SoCalGas is 40%. The Program's DBE hiring level and associated spend, with current subcontractors and vendors, was 24.1% in 2020.

The Program has evolved over the years allowing the development of relevant and timely curriculum while delivering production in a more efficient manner. The primary focus is to provide students with quality training which conforms to codes and standards while adhering to Program budget guidelines. Delivery adaptation was the imperative theme of 2020. Online training methods illustrating hands-on procedures have proved to be effective among most participants and a generous Q&A opportunity at the end of these sessions provides in-depth, individual instruction for those students who require more attention.

The Program continues to refine and improve its delivery as it determines methods to strategically and operationally align with the Workforce Education and Training goals of SoCalGas.

SCG_SW_WET_CC WE&T – SW-WE&T Career Connections

The WE&T Connections subprogram works in partnership with educational sectors, community-based organizations, and state education agencies to facilitate implementation of energy-efficiency strategic planning for K-12. This subprogram combines efforts to promote energy efficiency within these educational sectors while simultaneously providing energy-related education and career awareness information to students. There is coordination with the Department of Education to ensure the IOU educational materials are in alignment with California content standards. Schools are provided interactive programs, materials, and teacher workshops at no cost to schools or teachers. In 2020, the WE&T Career Connections program managers continued implementation of programs targeted towards the K-8 and 9-12 grade levels. The K-8 program is implemented by The Energy Coalition and the 9-12 program is implemented by Strategic Energy Innovation.

The Energy Coalition (K-12) reached 7,337 students (60% categorized as Title 1 schools).

Strategic Energy Innovations (9-12) reached 6,553 students directly and 2,780 students indirectly totaling 9,333 students (71% categorized as Title 1 schools).

In March of 2020, the program faced a challenge when school campuses closed due to COVID-19 and instruction was shifted to online platforms. The Energy Coalition and Strategic Energy Innovations pivoted quickly to meet the demands of the schools, educators, and students.

The Energy Coalition developed the PEAK@Home series for distance learning and require little to no materials for the students. Strategic Energy Innovations worked with teachers to provide customized learning solutions to the students for distance learning with student-facing materials when internet access wasn't available. Both programs face barriers of time with teachers to access the training and fit the material into the curriculum.

The Energy Coalition launched a YouTube Channel to house all recorded PEAK@Home STEM Hero and lesson webinars. This platform, created to house the PEAK library of videos and webinars permanently, will also house the PEAK@Home series. Undaunted by the challenges of 2020, The Energy Coalition continued to support educators as they transitioned to virtual learning. While in-person educator training was not possible, The Energy Coalition offered multiple sessions of online, interactive, and engaging zoom training, as well as self-paced online training. Educators participated in The Energy Coalition's highly effective "train the trainer" model as they learned about our PEAK program, which provides a no-cost, high quality, environmentally focused STEM curriculum to educators in underserved schools. PEAK@Home My Energy Future Webinars was developed to walk students through STEM career paths based on the STEM career that is highlighted.

Strategic Energy Innovations has observed a wide range of responses to the situation, making it challenging to provide one-size fits all solutions. Curriculum was redeveloped for virtual learning and hands-on activities for students and teachers. Material has been redesigned for those that do not have access to the internet.

The Career Connections subprogram addresses is aligned with the California Long-Term Energy Efficiency Strategy plan and contributes directly to the Workforce Education and Training goals of establishing energy-efficiency education and training at all levels of California’s educational system and engaging minority, low-income and disadvantaged communities in the subprogram.

Finance

SCG3735 Finance – On-Bill Financing

On-Bill Financing (OBF) offers interest-free, unsecured, repayment of loans on-the-utility-bill that work in conjunction with SoCalGas energy efficiency programs. It is designed primarily to facilitate the purchase and installation of qualified energy efficiency measures by non-residential customers who may lack up-front capital to invest in real and sustainable long-term energy cost reductions.

Loan terms range from up to ten years for commercial customers and up to fifteen years for government agency customers. The eligible loan amount is based on the project cost, less incentives, or rebates, up to the loan maximum of the OBF product and within the loan term thresholds. Customer loans are calculated to approximately equal the monthly energy savings and repaid through a fixed monthly installment on their utility bills. There is no prepayment penalty and loans are non-transferable. Partial or non-payment of loans could result in shutting off gas service.

On-Bill Financing (OBF) program features: Zero percent interest; No closing costs; Unsecured loan; Loan repayment added directly to SoCalGas utility-bill; and works in conjunction with utility energy efficiency rebate programs.

Loan Terms:

Customer Segment	Loan Amounts	Loan Terms
Business	Up to 10 years	Min- \$5,000- Max \$100,000
Multi-Family	Up to 10 years	Min- \$5,000- Max \$100,000
Low Income Multi-Family	Up to 10 years	Min- \$5,000- Max \$250,000
Local Government/Public Sector	Up to 15 years	Min- \$5,000- Max \$250,000
State of California	Up to 15 years	Min- \$5,000- Max \$1,000,000

The eligible loan amount is based on the project cost, less incentives or rebates, up to the loan maximum of the OBF product and within the loan table above.

The OBF program continued working with SoCalGas customer account representatives and external partners to encourage customers to participate. The OBF program closely coordinated

with the Local Government Partnerships and Institutional Partnerships on potential local and state government projects.

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

The COVID-19 pandemic caused many businesses and to close or put on hold on Energy Efficiency projects throughout 2020.

No program changes were made in 2020.

In 2020, OBF continued to serve as a funding mechanism to eliminate the barrier of upfront cash required for customers to move forward with deeper energy efficiency retrofits.

SCG3737 Finance – SW-New Financing Offerings

The IOUs were authorized by Commission Decision 13-09-044 to develop a set of statewide financing pilot programs that offer scalable and third-party capital leveraged financing products that increase the availability of financing for underserved sectors and result in deeper energy savings. Key features of the pilots will be in the form of credit enhancements and on-bill repayment (OBR) to attract private capital support for financing energy improvement projects. Pilots were developed for single family residential, multifamily, and small business sectors. Ratepayer-supported credit enhancements are made available to participating lenders offering financing for these programs. Credit enhancements provide additional security to participating lenders to mitigate loan default and provide more attractive borrowing terms for the customers. The California Hub for Energy Efficiency (CHEEF) is administered by the California Alternative Energy and Advance Transportation Financing Authority (CAEATFA), a state agency in the California State Treasurer's Office. CAEATFA is responsible for designing and developing program regulations for the Financing Pilots through an existing public rulemaking process with support from the investor-owned utilities (IOUs). The Residential Energy Efficiency Loan (REEL) program launched July 2016 for single family residential customers. The small business financing pilot launched in the second quarter of 2019 and the affordable multifamily pilot launched in the 3rd quarter of 2019.

SoCalGas, as the lead utility program administrator, along with the other IOUs continued to support CAEATFA in the implementation and marketing of the financing programs. During 2020, SoCalGas and the IOUs continued focused on local marketing of the financing programs by identifying cost-effective and integrated marketing, education and outreach (ME&O) options for both contractors and consumers.

As a result of this effort, CAEATFA reported REEL had surpassed \$17 million dollars in loan originations and had enrolled over 1000 loans. At the end of 2020, REEL had 491 participating contractors and 7 participating lenders in the program.

At the end of 2020, the Small Business Financing (SBF) Program had enrolled 7 loans with \$1.5 Million in loan originations. SBF program had 62 enrolled contractors and 3 participating lenders.

The COVID-19 pandemic had a huge impact on temporary and permanent closures of thousands of Small Businesses across the state. Many of the small business that remained open were not focused on energy efficient upgrades. Marketing strategies for the financing programs were paused during most of 2020 given the economic impact on jobs and small businesses. Commission Resolution E-5072 approved transition of the REEL program from pilot to full scale program. The resolution also authorized SoCalGas as lead IOU to extend the contract for marketing, education, and outreach that support the energy efficiency financing programs. The REEL program continues to reach underserved communities. Over half of the loans originated are made to properties in Low to Moderate income census tracts.

SCG3803 Finance – SW-California Hub for EE Financing

The California Hub for Energy Efficiency Financing (CHEEF) was established to design and implement new statewide financing pilots targeting the single family residential, multifamily, small business, and non-residential sectors. The CHEEF infrastructure coordinates the flow of third-party private capital to fund energy improvements, manage the availability of project, loan, and energy consumption data, and ensure a streamlined process for program participants. Key components of the CHEEF infrastructure includes a Master Servicer responsible for the day-to-day administrative operations of the program, a trustee bank responsible for holding and transferring ratepayer funds used for credit enhancements, a contractor manager that provides quality assurance and control (QA/QC) for finance-only projects, and data manager that will make anonymized and aggregated program data available to the public.

In Decision (D.) 13-09-044, the Commission requested the California Alternative Energy and Advanced Transportation Financing Authority (CAEATFA) to take on the role as CHEEF manager. CAEATFA is responsible for administering the CHEEF which includes developing program regulations for the Financing Pilots through a public rulemaking process, operationalizing program processes and forms, and managing outreach efforts to both contractors and financial institutions. A contract was executed by the investor-owned utilities (IOUs) and CAEATFA in September 2014 with the most recent amendment executed in 2020. SoCalGas (SCG) is the lead utility for the Financing Pilots Program and lead contract administrator for the CHEEF agreement. SoCalGas extended the CHEEF agreement through 2022 and administers monthly invoicing and reporting activities to the commission and IOU's.

In April 2020, the commission issued Resolution E-5072 which amongst other things restated the Commission's approval for CAEATFA to continue administering the pilots. Moreover, the resolution authorized CAEATFA to shift \$7.7 million of existing credit enhancement pool to support administrative needs through 2022. The resolution authorized IOUs to request additional funding to support the programs past 2020 through either utilization of unspent funds, Annual Budget Advice Letter (ABAL), submittal of tier 2 advice letter, or through future business plan filings. The IOU funds would support operational activities including marketing and designated SoCalGas to continue as the lead utility partner.

In 2020, the IOU's assisted CAEATFA in the marketing of the Residential Energy Efficiency Loan (REEL), Small Business Financing (SBF), and Affordable Multifamily Financing (AMF) pilots. The IOUs utilized each organization's Trade Pro Networks to promote the SBF program and AMF programs through "lunch n learns" and newsletters. CAEATFA and the IOUs also worked on requirements, testing, and implementation of the On-Bill Repayment (OBR) secure cash flow data exchange with the servicing bank. This process will allow customers to remit their Small Business Financing or Affordable Multifamily loan repayments directly on their utility bills.

SoCalGas remained actively involved in local marketing campaigns for the Residential Energy Efficiency Loan program to customers through direct mail and social media. SoCalGas is engaged in coordination meetings with CAEATA, Energy Division, the state-wide marketing implementer CSE, and facilitated meetings with the Finance leads from the other IOU's. GoGreenFinancing is the IOU co-branded website and contains lender, contractor, and partner information for customers to learn and apply for the loan programs. SoCalGas extended the CHEEF agreement through 20202 and administers monthly invoicing and reporting activities to the Commission and IOU's.

Public Sector Programs

Institutional Partnerships

Institutional Partnerships are designed to create dynamic and symbiotic working relationships between IOUs, state or local governments and agencies or educational institutions. The objective is to reduce energy usage through facility and equipment improvements, share best practices, and provide education and training to key personnel. In 2020 the Institutional Partnerships addressed programmatic challenges impacting energy efficiency projects at the campuses and state facilities as well as providing a concentrated effort to support shared energy efficiency, ZNE, and environmental goals. As described in the energy efficiency business plan, Institutional Partnerships will be considered part of the Public Sector Program portfolio. Through the energy efficiency Business Planning process, SoCalGas worked with partners to engage them in identification of challenges facing higher education and state agencies, as well as included them in the development of Public Sector strategies.

SCG3738 Public – CA Department of Corrections Partnership

The California Department of Corrections and Rehabilitation/Investor-Owned Utility (CDCR/IOU) partnership is a customized statewide energy efficiency partnership program that accomplishes immediate, long-term peak energy demand savings and establishes a permanent framework for sustainable, long-term comprehensive energy management programs at CDCR institutions served by California's four large IOUs.

The program continued the effort to ensure new construction projects and gas-saving, water conservation projects were clearly tracked and proactively managed. The Partnership provided

training to the 2020 ESCO pool that included program rules, policies and procedures required to successfully implement a project through the Program. Regular management team and project team meetings (every 4 weeks) have been key to identifying and managing projects, and proactively addressing any challenges the program may have faced.

In 2020, CDCR continued to use 63% of the energy consumed by state agencies under the Governor's executive authority. Though CDCR's budget for implementing energy efficiency projects is minimal, through the CDCR-IOU energy efficiency partnership program efficiency projects can be identified and implemented through the IOU core and On Bill Financing Programs. On Bill Financing and GS \$mart have been the primary source of funding. In select instances, On Bill Financing is supplemented by Special Repairs Project funding.

This program capitalizes on the vast opportunities for efficiency improvements and utilizes the resources and expertise of CDCR and IOU staff to ensure a successful and cost-effective program that meets all objectives of the CPUC. The program continues to leverage the existing contractual relationship between CDCR and Energy Service Companies (ESCOs) to develop and implement energy projects in CDCR facilities.

In 2020, CDCR continued implementing retrofit projects and performing Investment Grade Audits. The IOUs and the Program Administration Manger (PAM) supported development of the new projects, ensuring that they reached maximum efficiency and incentive potential. To support more project development, the IOUs continue to prioritize projects using energy audits that had been done on a subset of CDCR's facilities, resulting in the next wave of projects.

CDCR's ESCO pool rebid occurred in Q2, 2020. Anticipating and planning for ESCO pool rebids plays a critical role in maintaining project momentum and successful project completion. The Partnership hosted the biannual training to onboard the new ESCO pool ensuring they are sufficiently acquainted with all program processes and procedures and setting them up to deliver successful and cost-effective projects.

The Covid-19 Pandemic resulted in several implementation challenges including limited access to facilities, project slowdowns, and agency budget shortages. While these challenges will continue into 2021, the Partnership continues to look for creative ways to encourage and support participation. Scalable program changes will bridge the gap in 2021 until the rollout of the 3P Program that is scheduled to start Q1, 2022.

There were no significant program changes made in 2020.

Through the (CDCR/IOU) partnership, energy audits were originally performed in 2006 for the institutions within the IOU territories. CDCR and the IOUs created a master schedule and prioritization of energy efficiency audits to use as a planning tool for future energy efficiency projects. This effort continues to create a robust pipeline for CDCR to use as a guide to choose which projects to focus on each year, typically initiating between 6-10 projects per year. The Partnership provided ongoing outreach and education to institutions, ESCOs and stakeholders and continues to improve program processes and procedures. Therm savings were achieved in 2020 in SoCalGas territory from several Savings by Design projects at California Institute for Men (CIM) and California Correctional Institution (CCI). Based on the master

schedule and prioritization of energy efficiency audits, additional projects remain as opportunities in the pipeline for 2021.

SCG3739 Public – California Community College Partnership

The California Community Colleges/Investor-Owned Utility (CCC/IOU) Energy Efficiency Partnership is a unique, statewide program to achieve immediate and long-term energy savings and peak demand reduction within California’s higher education system. The statewide incentive funding for the 2020 program year was utilized to maintain the Partnership program processes and framework established in previous program cycles for sustainable, comprehensive energy management at campuses served by California's four Investor-Owned Utilities.

The program has a hierarchical management structure to ensure successful implementation that includes an Executive Team and Management Team comprised of senior leadership at the CCC Chancellor’s office, sustainability managers from CCC campuses, and IOU management on an ongoing basis.

The team conducted quarterly meetings to discuss program management, overall program status and policy issues. The CCC Partnership also focused heavily on outreach efforts in several areas, including: (1) development of a comprehensive list of technologies, project types, and offerings to be used by team members during campus visits to help generate project ideas; (2) evaluation of new project technologies for suitability in the Community College market; and (3) planning and participation in CCC conferences and regional Campus Forums.

The CCC Partnership participated in virtual quarterly Campus Forums in both Northern and Southern California, serving as a venue for districts to share successes and strategies to address the common challenges faced for facilities management and energy efficiency. The CCC Partnership team presented at these Forums, providing time-sensitive updates on new technologies, information on program implementation, and direct assistance to districts in attendance.

The Management Team participated in several virtual CCC conferences such as the California Higher Education Sustainability Conference (CHESC), Community College Facilities Coalition conference (CCFC), and the Association of College Business Officers (ACBO) conference to reach a diverse audience of facilities, business officers, administration, and board members. In addition, the team participated in Northern and Southern California regional virtual energy meetings organized by the Community Colleges (NorCal Summit, Southern California Facilities Officers) targeted towards campus facilities and energy managers. Finally, Outreach Team members conducted virtual campus meetings with Facilities and O&M staff to review project opportunities and manage project development efforts both on site at the colleges and while participating in the virtual ACBO Facilities Task Force quarterly meetings.

In addition to the virtual quarterly Management Team meetings to discuss overall program status, initiatives, and policy issues. The team actively provided updates specific and respective to their own IOU territory comparing actual savings to goals. These reports were reviewed by

both Community College Management Team members and IOU management on an ongoing basis.

The coronavirus pandemic created additional challenges in 2020 for all parties involved in the Partnership. The partners adapted to virtual operations, and project delays, while in-person operations were suspended. The pandemic created additional strain on campus budgets preventing the development and implementation of new and ongoing projects. Additionally, utilities and campuses faced engineering challenges to address the pandemic as a non-routine event.

Proposition 39 funding has ended, which is creating a significant slowdown statewide for the identification of new energy efficiency projects in the upcoming year. All efforts for CCC Districts are focused on the complete utilization of any available funding.

The Management team assessed impacts of the changing landscape throughout the state of California and a decision was made to include Energy Resources & Sustainability discussions into the Management meeting.

The CCC Partnership provided extensive outreach and technical support through virtual formats (Zoom, Go To Meetings and Microsoft Teams) to the districts within the CCC system in support of their efforts to identify, develop, and implement projects funded through remaining funds left in Proposition 39, the California Clean Energy Jobs Act of 2012. The IOUs worked closely with the Chancellor's Office to develop resources and infrastructure into the CCC and successfully implement hundreds of Prop 39 projects across the State. These projects were implemented using the final year of funding provided by the state Legislature. Typical project types implemented were LED lighting, HVAC, controls, and Retro-commissioning (RCx).

The use of Proposition 39 funding continued to be very successful with over 932 energy projects funded over its five-year life. These projects will result in significant annual energy savings, saving the CCCs \$19.9 million per year in reduced energy costs system wide.

Over \$184 million in Proposition 39 funding was allocated to districts over the 5-year program life and all projects were completed and closed-out in 2019. However, there was roughly \$6 million in "project savings" due to cost underruns at 21 districts as the final projects were closed-out. The CCC Chancellors Office extended the program deadline in order to spend the largest share of the remaining \$6 million.

SCG3740 Public – UC/CSU/IOU Partnership

The UC/CSU/Utility Energy Efficiency Partnership is a unique, statewide program which includes California's four investor-owned utilities, Pacific Gas and Electric (PG&E), Southern California Edison (SCE), Southern California Gas Company (SCG), and San Diego Gas and Electric (SDG&E), as well as the Los Angeles Department of Water and Power (LADWP), in partnership with the University of California (UC) and the California State University (CSU). The program generates energy savings through the identification and implementation of energy efficiency projects. The Partnership consists of three main project types: retrofit, commissioning, and new construction. Since its establishment in 2004, the Partnership has provided

approximately 67 MW demand reduction and delivers approximately 500 million kWh/yr and 26 million therms/yr in energy savings.

The program has a hierarchical management structure to ensure successful implementation. The Management Team meets monthly to conduct business at the operational level and the Executive Team meets on an as needed basis to discuss overall program status and policy issues. In addition to representatives from each Utility, the University of California Office of the President and California State University Chancellor's Office each have members on both program management teams. Inclusion of all Partnership stakeholders at the various management levels provides the UC and CSU campuses with support in their efforts to implement energy efficiency projects. A Program Administrative Manager (PAM) organizes and facilitates team activities, works with individual stakeholders, actively tracks project savings and schedule data in a web-based tracking tool and creates regular reports to show overall status of the program and forecasts relative to goals.

As the transition to the new third-party programs has taken longer than anticipated, the Partnership team decided to look at ways the current Partnership could be reinvigorated and incorporate current priorities to enhance its value over the next two years. The following five priority areas were identified as offering the most value to UC and CSU: Carbon Reduction, Meter-Based Savings Methodologies, Financing, Resiliency, and Human Resources. Throughout 2020, the team continued to discuss potential opportunities, as well as monitor progress of ongoing initiatives, in these priority areas.

With the assistance and input from the University of California, the IOUs continued implementation and development of various program offerings and High Opportunity Project or Programs (HOPPs), including a whole building program consistent with SB350, AB802 and AB1150 to demonstrate measured savings against existing conditions, pay for performance, and comprehensive whole-building approach to building efficiency.

The PAM implemented a new, more efficient and comprehensive project tracking database for the Partnership to replace the existing database. The public-facing Dashboard was also re-organized to be more user friendly.

The coronavirus pandemic created additional challenges in 2020 for all parties involved in the Partnership. The partners adapted to virtual operations, and project delays, while in-person operations were suspended. The pandemic created additional strain on campus budgets preventing the development and implementation of new and ongoing projects. Additionally, utilities and campuses faced engineering challenges to address the pandemic as a non-routine event.

In 2020, PG&E adjusted the eligibility for UC/CSU participation in Savings by Design, requiring a Total Resource Cost of 1.25. This new requirement prevents the majority of UC/CSU Savings by Design projects from qualifying for this program in PG&E territory.

Some campuses stopped pursuing certain projects due to incentive cuts resulting from non-utility supply hourly analysis. In addition, current Commission policy requiring energy savings above

code (Title 24) and industry standard practice baselines is not always aligned with determining project financial impact to support project financing or translating savings to carbon reductions to meet university carbon goals. MBCx offerings at the various IOUs were discontinued in 2016, limiting project opportunities for UC and CSU, leaving a significant gap from what was a practical and popular delivery method for campuses. Additionally, many custom measures were moved to deemed, decreasing the claimable energy savings and incentives received by universities. In 2019, the Partnership also experienced a significant budget cut which resulted in the discontinuation of the Partnership Training and Education Program.

The Partnership focused widely on efforts surrounding normalized metered energy consumption (NMEC) in compliance with AB-802. SCE and SoCalGas closed out their first whole building HOPPs project at UC Santa Barbara, in parallel to the Partnership. PG&E launched a new Performance Based Retrofit Program in 2019 and began developing and implementing NMEC projects at UC Davis, UC San Francisco, UC San Francisco Medical Center, and UC Berkeley. UC Irvine also began work on a project looking at CalTRACK methodologies for NMEC.

In addition to NMEC projects, UC and CSU focused on addressing barriers to energy efficiency, developing new contracting mechanisms, looking into opportunities for financing projects via OBF, and continuing work on a CEC Grant to develop a Master Enabling Agreement for energy efficiency at UC and CSU campuses.

SCE's Clean Energy Optimization Pilot (CEOP) began at several campuses in 2019 and continued through 2020. CEOP and the Partnership are mutually exclusive, so Partnership activities at CEOP campuses were discontinued.

The Partnership determined several programmatic changes which will take effect in the 2021 cycle. Beginning in 2021, the Savings by Design Program will transition to a statewide third-party program and its incentives will no longer be provided through the Partnership.

Due to COVID-19, projects completions and projects closeouts have extended timeframes which will require additional review time to finalize savings and project success. Additionally, the integration of LADWP into the Partnership and the resulting collaboration between Investor Owned and Public Owned Utilities provides a working model for the Public Sector in California to deliver truly comprehensive energy efficiency programs.

SCG3741 Public – State of CA/IOU Partnership

The State of California Investor-Owned Utility (IOU) Partnership is a Statewide program designed to achieve long-term energy and peak demand savings and establish a permanent framework for sustainable, comprehensive energy management programs at state facilities served by California's IOUs.

The IOUs work collaboratively with the Department of General Services (DGS), coordinate with the established pool of Energy Service Companies (ESCOs) to help implementation of comprehensive facility energy efficiency projects, and work with individual state agencies on technology-specific projects. DGS leverages Department of Finance Energy Smart program,

along with the IOU's On Bill Financing, incentives, and rebates to provide financing for project opportunities. As financing options continue to evolve, the Partnership will help ensure that the best financing pathway for each project is chosen to ensure project optimization.

The State of California Partnership is a continual and collaborative effort to support DGS to manage projects for Departments without contracting authority. The State/IOU Partnership Program Administration Manager (PAM) continues to coordinate between the IOUs and the DGS through regular communications to ensure that project documentation is shared as needed, projects are tracked, project momentum is maintained, new project approaches are identified, and customer concerns/support items are addressed in a coherent and sympathetic fashion.

The IOUs continued to work with the State to prioritize agencies that may benefit from ESCO work, both for large and pooled small buildings. The Partnership has provided extensive outreach and technical support to Agencies including California Highway Patrol (CHP), Department of Motor Vehicles (DMV), Department of Parks and Recreation (DPR), the Judicial Council of California (JCC), and the Department of Food and Agriculture (DFA). Outreach to these agencies through the Sustainable Buildings Working Group (SBWG) meeting and through other avenues continued to create a robust pipeline of future energy efficiency projects. The COVID-19 Pandemic resulted in several implementation challenges including limited access to facilities, project slowdowns, and agency budget shortages. While these challenges are anticipated to continue into 2021, the Partnership continues to look for creative ways to encourage and support participation. Scalable program changes will bridge the gap in 2021 until the rollout of the 3P Program, slated for Q1, 2022.

There were no significant program changes made in 2020.

In 2020, the IOUs and DGS leveraged findings from a working group organized in 2019 to address Savings by Design (SBD) participation barriers for DGS buildings. Working group efforts led to the development several process documents to help better understand the DGS procurement process. The Partnership continues to track a resulting SBD project, currently in progress, to use as a test case for implementing solutions developed by the working group. The IOUs attended the Sustainable Building Working Group meetings, a State of California working group that consists of agency sustainability managers, with the task of planning and implementing all aspects of B-18-12, the Governor's Executive Order. The IOUs attend in a supporting role to ensure that agency needs regarding energy data for benchmarking are met. The IOUs continue to use this platform for agency outreach.

Through training and outreach activities, the State/IOU Partnership increased awareness and understanding of Statewide Program offerings to additional State agencies. DGS did not complete a project in Southern California Gas (SoCalGas) territory in 2020 but based on continued agency outreach, The State/IOU Partnership anticipates additional opportunities for DGS projects in 2021 and beyond.

Local Government Partnerships

SoCalGas' Local Government Partnerships (LGP) are unique, complex, and multi-dimensional partnerships with select local government customers. Local governments are a distinct customer segment that operate with their own unique challenges and needs related to energy efficiency. Local governments have a unique role as leaders in their communities and can play a role as a delivery channel to help share core IOU programs to the communities and businesses they serve. Increasingly, local governments are interpreting their responsibility for community well-being to include reducing GHG emissions, increasing renewable energy usage, protecting air quality, creating green jobs, and making the community more livable and sustainable.

Local Government Partnerships are designed to serve and support local governments by increasing energy efficiency in municipal facilities, provide programs and services to local communities that can help them reduce both operating costs, and greenhouse gas emission levels through energy-efficiency. SoCalGas supported Partnerships in achieving their energy efficiency and climate goals. SoCalGas worked with partners to engage them in the identification of challenges faced by local governments, as well as included them in the development of Public Sector strategies.

SCG3742 Public – LA Co Partnership

The County of Los Angeles Partnership supports the energy reduction and environmental initiatives described in the Los Angeles County Energy and Environmental Plan, adopted in 2008, and the objectives of the California Long Term Energy Efficiency Strategic Plan (CLTEESP). Energy Efficiency (EE) projects are focused on County-owned municipal buildings, consisting of lighting, HVAC, Retro-Commissioning, Steam Boilers, and Savings-By-Design new construction projects at each of the 38 County departments served by Energy Management (County Internal Services Department). Additional efforts with the County Office of Sustainability include program support and coordination for Energy Upgrade California, and Strategic Plan Solicitation activities that expand the County's Enterprise Energy Management Information System (EEMIS), allowing Los Angeles County to receive and analyze participating City data to help the city better manage their energy usage and support the identification of EE opportunities.

The Partnership collaborated with Los Angeles County Internal Services Department (ISD) and its Energy Environmental Services (EES) to capitalize on EE opportunities by working with representatives from the 38 County Departments served by ISD for energy management services. Moreover, the Partnership interacted with ISD, Public Works, Parks and Recreation, Metropolitan Department of Transportation, and Sheriff's Department on strategies to develop energy savings opportunities and strategic implementation forecasts.

The Partnership coordinated with Los Angeles County in identifying EE projects throughout County facilities, including Pitchess Detention Center, Antelope Valley Service Centers and Registrar Recorder HQ, and informed Los Angeles County departments on programs and workshops offered to improve awareness of EE incentives and rebates.

The Partnership continued to provide data to Los Angeles County Enterprise Energy Management Information System (EEMIS) to support local governments enrolled in the County

offering. Additionally, the Partnership supported Los Angeles County’s pursuit of operational effectiveness, fiscal responsibility, and accountability through EE programs.

The Coronavirus or COVID-19 impacted the 2020 project identification and assessment as priorities and resources shifted to manage the pandemic. The County’s fiscal outlook was significantly impacted and taken measures to limit spending including a freeze on hiring and purchases. Moreover, the County continues to share concerns over measures being removed from custom incentive program due to standard industry practice policies. Thus, making it difficult to justify projects moving forward due to limited measures, and higher implementation costs for higher efficiency products. Additionally, the County expressed concerns on project approval timeline to fit in financial fiscal year.

SCE ended its partnership in 2020. SoCalGas continued its partnership with the County and agreed to use joint RCx program to complete RCx projects with SCE’s assistance. Projects in SCE territory will be processed through SCE’s program and SoCalGas will reimburse SCE for the saved therms through the custom incentive program. SoCalGas will process projects outside of SCE territory.

The partnership prioritized EE retrofits across Los Angeles County facilities and identified potential 2021 EE projects within Los Angeles County facilities.

SCG3744 Public – Riverside Co Partnership

The County of Riverside Energy Partnership is a partnership between Southern California Gas Company (SoCalGas) and Riverside County (County). The Partnership assists the County in achieving its green policy initiatives and formulate an integrated approach to energy efficiency (EE). This collaborative effort aims to build an infrastructure that would efficiently deliver cost effective EE projects to reduce the “carbon footprint” created by County facilities.

The Partnership improves EE in the County’s municipal facilities, leverages utility resources, customized to the Counties unique needs, to advance EE in the partners facilities. The Partnership also supports the County in meeting CO2 reduction requirement efforts of AB32, as well as contributing toward meeting CPUC energy savings goals and objectives.

The Partnership held bi-monthly in-person meetings to discuss program status, project tracking and overall program implementation and coordination issues.

However, in the March timeframe, the bi-monthly in-person meetings had to be transitioned to a virtual format due to the COVID-19 pandemic. The Partnership continued to collaborate with the County by engaging with them through various virtual and electronic channels.

The Partnership was able to offer Building Operator Certification (BOC) virtual training to the County. Three of their employees took part in the training.

Even though the COVID-19 pandemic presented a challenge, the Partnership was still able to help the County achieve a savings of 13,298 therms. The County also received \$32,130 in rebates. These projects were identified during the monthly in-person meetings at the beginning

of the year as well as the continued virtual engagement between SoCalGas and the County throughout the year.

Due to the limitations brought on by the COVID-19 pandemic, bi-monthly in-person meetings had to be either placed on hold or transitioned to a virtual format. The Partnership tried to counteract these limitations by continuing to engage with the County through various virtual and electronic channels.

It was decided in 2020 that the Riverside County Energy Partnership would be integrated into the Western Riverside Energy Partnership for the 2021 Program Year.

The Partnership reached 87% of its goal by saving 13,298 therms. The County also received \$32,130 in rebates. Additionally, three County employees participated in the virtual Building Operator Certification Training (BOC) offered by the Partnership. Throughout the COVID-19 pandemic, the Partnership continued to virtually engage actively with the County to identify potential future opportunities.

SCG3745 Public – San Bernardino Co Partnership

The San Bernardino County Energy Partnership is a partnership between Southern California Gas Company (SoCalGas) and San Bernardino County (County). The Partnership assists the County in achieving its green policy initiatives to formulate an integrated approach to Energy Efficiency (EE). It is a collaborative effort with the aim to build an infrastructure that would efficiently deliver cost effective EE projects thus reducing the “carbon footprint” created by County facilities.

For the first couple of months, the Partnership participated in monthly in-person meetings with Project Managers from various County departments to identify opportunities and provide an overview of SoCalGas’ various resources and core program offerings. Additionally, SoCalGas’ Account Executive presented to County Project Managers at their staff meeting in February to provide an overview of 2020 Rebates.

However, in the March timeframe, the monthly in-person meetings had to be placed on hold due to the COVID-19 pandemic. The Partnership continued to engage with the County by following up with Project Managers individually as well as including them in various email notifications to inform and promote available energy efficiency opportunities and webinars.

The Partnership coordinated an in-person tour of the Pico Rivera Facility on February 12th for a representative from the San Bernardino County Superintendent of Schools. He got a tour of the various SoCalGas departments including Gas Quality/Product Testing lab, Tour of Customer Service Training and Tour of Gas Operations Training.

The Partnership was able to offer Building Operator Certification (BOC) virtual training to the County and one of their employees took part in the training.

Even though the COVID-19 pandemic presented a challenge, the Partnership was still able to help the County achieve a savings of 8,860 therms. The County also received \$26,921 in rebates. These projects were identified during the monthly in-person meetings at the beginning of the year as well as the continued virtual engagement between SoCalGas and the County throughout the year.

Due to the limitations brought on by the COVID-19 pandemic, monthly in-person meetings had to be placed on hold. The Partnership tried to counteract these limitations by continuing to engage with the County through various virtual and electronic channels.

It was decided in 2020 that the San Bernardino County Energy Partnership would be integrated into the San Bernardino Regional Energy Partnership for the 2021 Program Year.

The Partnership reached 60% of its goal by saving 8,860 therms. The County also received \$26,921 in rebates. Additionally, a County employee participated in the virtual Building Operator Certification Training (BOC) offered by the Partnership. Throughout the COVID-19 pandemic, the Partnership continued to virtually engage actively with the County to identify potential future opportunities.

SCG3746 Public – Santa Barbara Co Partnership

The Santa Barbara County Energy Watch Partnership is a joint effort between Southern California Gas Company (SoCalGas) and the Santa Maria Valley Chamber of Commerce. The Partnership's participating municipalities are Buellton, Solvang, Guadalupe, Santa Maria, and the County of Santa Barbara. The program generates energy savings through identification of municipal Energy Efficiency (EE) projects, projects with Special Districts, and projects associated with K-12. The program also provides access to resources and outreach for all Utility Core Programs within Energy Efficiency and Customer Assistance.

In 2020, the program transitioned from Pacific Gas and Electric (PG&E) as an included utility partner, to Southern California Gas Company as the exclusive utility partner. This allows additional flexibility by adding the City of Lompoc to the area served.

The North Santa Barbara Energy Watch Partnership was able to coordinate a zoom meeting between Southern California Gas Company representatives and the Santa Barbara County Education Office School District. In attendance were officials and representatives of every school district in North Santa Barbara County with over 45 attendees. Southern California Gas made a presentation about resources and Energy Efficiency project assistance.

The North Santa Barbara Energy Watch coordinated a zoom meeting with the City of Lompoc Public Works and other departmental representatives. Southern California Gas Company representatives were able to discuss energy savings, rebates, potential projects, and resources. This resulted in rebates to the City of Lompoc for energy efficiency project work that was performed.

The North Santa Barbara Energy Watch Partnership coordinated a zoom meeting with City of Santa Maria Public Works and other departmental representatives. Southern California Gas Company representatives discussed resources and assistance on energy efficiency projects.

The North Santa Barbara Energy Watch Partnership connected regional partners with webinars, education, training, and resource opportunities that were available from Southern California Gas Company. In addition, the Partnership forwarded COVID-19 updates to its regional partners that were provided by Southern California Gas Company and its representatives.

The North Santa Barbara Energy Watch Partnership continued to use the resources of the Santa Maria Valley Chamber of Commerce to reach municipalities, K-12, and Special Districts as part of the Energy Watch Partnership strategy.

The North Santa Barbara Energy Watch Partnership experienced the same limitations imposed on everyone due to COVID-19. Outreach and meetings transitioned to communications through electronic means, including webinars, and zoom meetings.

The pandemic made in person, one-on-one meetings difficult if not impossible and severely restricted site visits. Severely affected was K-12, where all focus was on virtual learning and dealing with the pandemic. Restrictions did not ease as 2020 ended.

The North Santa Barbara Energy Watch Partnership made a transition midway through 2020 to focus on program work with Southern California Gas Company as the exclusive utility partner. This resulted in a more focused agenda, while including the City of Lompoc which is serviced by Southern California Gas Company, which was previously not in the Partnership because it was not in Pacific Gas and Electric's service area.

Program changes included pivoting to electronic meetings and communications rather than in-person meetings or site visits.

In spite of COVID-19 and associated obstacles, the North Santa Barbara Energy Watch Partnership was still able to successfully connect Southern California Gas Company representatives with K-12 school districts and municipalities.

The North Santa Barbara County Energy Watch Partnership continued its mission of outreach on Energy Efficiency (EE) and doing everything possible to facilitate assistance and projects with municipalities, school districts and special districts within the Partnership area.

SCG3747 Public – South Bay Cities Partnership

The South County Energy Efficiency Partnership includes Southern California Gas Company (SoCalGas), and municipal governments within the County of Santa Barbara -- including Santa Barbara County and the cities of Santa Barbara, Goleta, and Carpinteria. The program generates energy savings through identification of municipal energy efficiency projects, education and training, and marketing and outreach. Cities complete retrofits of their own facilities and conduct community sweeps as well as outreach to residential and business communities to increase

participation in core programs. The partnership acts as a portal for all energy offerings including Low income, CARE, Demand Response, Self-Generation, and demand response programs are included. The Partnership provides energy information to all market segments, identifies projects for municipal retrofits, and funnels customers to existing energy efficiency programs. A local non-profit, the Community Environmental Council, provides administrative and programmatic support to the Partners.

Throughout 2020, SCEEP continued to drive city leaders, residents, and businesses toward energy efficiency actions through regular meetings of partner municipalities to exchange best practices and to learn about SoCalGas energy efficiency programs. SCEEP also sponsored the Santa Barbara County Green Business Program luncheon; the program supports local businesses in energy efficiency measures. This event took place in person before COVID-19 restrictions went into effect. SCEEP conducted direct outreach regarding CARE rates and opportunities for savings to community members and community-based organizations.

The program is falling short of expectations because of serious difficulties to identify and complete energy efficiency projects.

In 2020, Southern California Edison left the partnership, making the focus of the partnership completely on energy efficiency in natural gas applications. Additionally, all partnership activities went online in mid-March of 2020 because of the Covid-19 pandemic. The therm savings goal for the partnership was not met in 2020.

SCG3748 Public – San Luis Obispo Co Partnership

The San Luis Obispo Energy Watch (SLOEW) is a Local Government Partnership (LGP) between Southern California Gas Company (SCG) and local governments in San Luis Obispo County (San Luis Obispo County; cities of Arroyo Grande, Atascadero, Grover Beach, Morro Bay, Paso Robles, Pismo Beach, and San Luis Obispo; community service districts Avila Beach, Cambria, Cayucos, Heritage Ranch, Los Osos, Nipomo, Oceano, Port San Luis, San Miguel, San Simeon, South County Sanitation, and Templeton). The partnership is implemented by the San Joaquin Valley Clean Energy Organization (SJVCEO).

The SLOEW Partnership exists to aid in efficiency and sustainable ventures for local governments, create and support clean energy efforts to improve the quality of life for all residents, identifies opportunities for improved energy efficiency (EE) in municipal infrastructure; offers customized incentives for municipal projects; conducts EE trainings; market and distribute information surrounding core utility programs; and supports the California Long Term Energy Efficiency Strategic Plan. The Partnership supports peer best practice sharing through the Peer-to-Peer Working Group (P2P), the Rural Hard to Reach Local Government Partnerships' Working Group (RHTR), and the California Energy Efficiency Coordinating Council (CAEECC) as a general member, and on the Public Sector and Cross Cutting subcommittees.

SoCalGas held one SLOEW partnership meeting to kick off 2020. Worked in coordination with SLO County Public Works to advance a comprehensive energy efficiency project at County

Operation Center, which includes jail and detention facilities. The project will start construction in 2021 and includes a comprehensive list of both electric and natural gas measures.

SLOEW did not participate in public outreach events or engage in any travel due to COVID-19 protocols. SLOEW moved informational content to online channels and created work from home bundles. In total 17 bundles sent to partners that highlighted on gas project/saving opportunities in addition to the 5 total newsletters sent out to partners.

The only known barrier as for many was COVID-19, which restricted travel and in person engagement with customers. Due to the uncertainty of COVID-19 protocols throughout the year and capacity of our partners, SLOEW changed from monthly partnership meetings to 1:1 energy coaching. Change allowed partners to have the opportunity to have more in-depth conversation on past energy needs and current opportunities.

There were no therm savings goals created for 2020.

SCG3749 Public – San Joaquin Valley Partnership

The Valley Innovative Energy Watch (VIEW) is a Local Government Partnership (LGP) between Southern California Gas Company (SCG) and local governments in Kings and Tulare counties (Kings County, city of Hanford; Tulare County, cities of Farmersville, Lindsay, Porterville, Tulare, Visalia, and Woodlake). The partnership is implemented by the San Joaquin Valley Clean Energy Organization (SJVCEO).

The VIEW Partnership identifies opportunities for improved energy efficiency (EE) in municipal infrastructure; offers customized incentives for municipal projects; conducts EE trainings; hosts and participates in outreach events to drive participation in core utility programs; and supports the California Long Term Energy Efficiency Strategic Plan. The Partnership supports peer best practice sharing through the Peer-to-Peer Working Group (P2P), the Rural Hard to Reach Local Government Partnerships' Working Group (RHTR), and the California Energy Efficiency Coordinating Council (CAEECC) as a general member, and on the Public Sector and Cross Cutting subcommittees.

SoCalGas held one VIEW Partnership meeting to kick off 2020. The company hosted 1:1 energy coaching meetings with city partners, which led to connections for direct install work. The company also hosted and participated in six Rural Hard to Reach Working Group meetings. VIEW did not participate in public outreach events due to COVID-19 protocols. VIEW moved informational content to online channels and created work from home bundles. In total 17 bundles sent to partners focused on gas project/saving opportunities.

The only known barrier as for many was COVID-19.

VIEW changed from bi-monthly partnership meetings to 1:1 energy coaching. The change allowed partners to have more in-depth conversation on past energy needs and current opportunities.

The program achieved 998 therms saved. Therm savings goals were not reached in 2020.

SCG3750 Public – Orange County Cities Partnership

The Orange County Cities Energy Efficiency Partnership Program includes the cities of Huntington Beach, Westminster, Fountain Valley, Costa Mesa, Newport Beach, City of Irvine and the City of Santa Ana as well as Southern California Edison (SCE) and SoCalGas (SCG). In addition to identifying and implementing Energy Efficiency retrofits for municipal facilities, the Partnership also funds community education, marketing, and outreach efforts to create awareness and connect residents and businesses with information and opportunities to take energy actions. In addition, the partnership goals include strategic plan activities, such as climate action planning, updating the Energy Action Plans, code compliance, and reach codes. The cities are supported in creating and accomplishing long term sustainability goals.

All Outreach events were cancelled in 2020 due to the Covid-19 Pandemic. SoCalGas continued working with partners through virtual meetings to provide information on available offerings and receive feedback for supporting the partners in 2021.

Due to the pandemic, the Cities were reluctant for in person participation to allow access to City facilities. In addition, in person meetings were not able to be scheduled and it was also an obstacle to schedule them virtually. Lastly, the Cities were facing issues with Covid-19 preparedness.

We were not able to meet with cities in person after February 2020 due to Covid-19 and had difficulty connecting with City Representatives for Virtual Meetings. Program Objectives were not met in 2020.

SCG3751 Public – SEEC Partnership

The Statewide Energy Efficiency Collaborative (SEEC) catalyzes local government action toward meeting California's Long-Term Strategic Plan goals via technical support, coaching, education, peer-network development, and recognition through three Non-Government Organizations: Local Governments for Sustainability (ICLEI), Institute for Local Government (ILG), Local Government Commission (LGC) and Best Practices Coordinator (BPC). The Statewide Local Government Best Practices Coordinator works with the three non-profits and the four investor-owned utilities to support implementation of the California Long-term Energy Efficiency Strategic Plan as an independent advisor and facilitator for local governments.

In 2020 the Institute for Local Government (ILG) honored 36 California cities that have taken significant steps to reduce greenhouse gas emissions, save energy, and implement best practices in sustainability. As of December 2020, the Beacon Awards program supports and recognizes over 160 participating cities and counties setting the standard in California for what it means to be a healthy and vibrant community and awarded 55 Beacon Spotlight and Vanguard Awards. The Best Practices Coordinator continued to provide technical and programmatic support to local governments throughout 2020. The first technical assistance request was on Local Natural Gas Emission Reduction Options, where the EE Coordinator hosted virtual office hours featuring 6

speakers and produced a 13-page issue brief. The 2 technical assistance requests were on Self-Generation Incentive Program (SGIP) Eligibility and Energy Savings Performance (ESPC) Guidance. The BPC also created the California Local Energy Technical Assistance Directory. It features experts who provide free technical assistance to local government professionals on energy and climate topics. The BPC also hosted two webinars during the 11th Annual SEEC Forum. The first webinar, “How Disadvantaged Communities Can Take Advantage of Dedicated Energy and Climate Opportunities” focused on sharing state resources in which Disadvantaged Communities (DAC’s) can utilize to achieve their climate and energy goals. The final webinar “What Do We SEEC Next” provided an interactive space for NGO and IOU representatives to provide their post-SEEC updates and a listening session for participants to provide feedback on the kind of support in which local governments need most.

This year, ICLEI USA focused on providing technical assistance to SEEC California communities completing community-wide and local government operations greenhouse gas (GHG) inventories. Conducting GHG inventories is a complex but necessary task for communities to address climate change and begin their path towards aggressive climate action. Although the SEEC Program was set to end December 2020, ICLEI USA made providing technical assistance a top priority for SEEC communities to ensure any current inventories were completed. In 2020, 82 community-wide inventories and 5 local government operations inventories were completed in ClearPath CA. ICLEI also developed a 2020 update of the State of Local Climate Action report for California communities. This report highlighted California communities and the achievements in climate actions made in the years 2016-2020. The report is expected to be published in January 2021.

LGC is responsible for coordinating the SEEC Forum, which is traditional multi-day event. Due to COVID-19, the event was transformed into a six-month webinar series, featuring diverse topics and several community engagement activities. LGC identified an accessible webinar platform for program partners and forum attendees, modified the call for proposals into a three-round series, organized three networking activities, an attendee raffle, and created the SEEC Peer-to-Peer networking via LinkedIn to help foster community engagement. All of these adjustments to the SEEC Forum required additional coordination and planning from the LGC staff, advisory committee members, and presenters. Despite these challenges, within a three-month period staff were able to pivot and organize a successful online forum which followed the theme of Promising Solutions for a Clean Energy Future and reached 1,824 customers via 18 total webinars.

Due to COVID-19, it was not possible to host an in-person Beacon Awards ceremony. ILG staff pivoted to produce a pre-recorded ceremony featuring highlights from winning agencies and our partners. Hosted on Zoom, approximately 200 participants attended the virtual ceremony to celebrate each other’s achievements. SoCalGas awarded ICLEI, ILG, LGC and Best Practice Coordinator for a decade of program success and collaborations. Despite the inability to meet in person, the 2020 Beacon Awards ceremony was a significant success, and was featured in multiple media channels afterwards. As in past years, it was difficult and time intensive to obtain accurate energy savings data for Beacon participants. This year, only two communities were recognized for natural gas savings. In continuing the program, ILG looks to streamline these award categories to enable increased recognition opportunities.

In light of COVID-19, a major challenge was transitioning the annual Statewide EE Forum to a virtual format. The traditional multi-day event was scheduled as a six-month webinar series, featuring diverse topics and several community engagement activities. To coordinate the event, LGC staff identified an accessible webinar platform for program partners and forum attendees, modified the call for proposals into a three-round series, and hosted organizer calls to support panelists in their online presentations.

In a year when we've responded to a global pandemic, devastating wildfires, social justice demonstrations, economic uncertainty, and more, ILG also sought to provide resources and support to communities to help them maintain their commitments to climate and energy efficiency. ILG produced 12 Beacon Program monthly newsletters featuring announcements for award recognition opportunities, funding resources, informational webinars and more. ILG also developed and launched a Best Practices Guide for Sustainability during COVID-19, based on actions Beacon communities have undertaken across the state to support local governments in identifying solutions that can ease the burden of the pandemic on their communities.

SEEC met their goals and objective despite a COVID-19 pandemic, these consisted of development of 356 SEEC ClearPath Accounts, 200 award ceremony attendees; 82 Community GHG inventories developed, 6 Full Beacon Awards, 5 Local Gov't GHG Inventories, 2 Natural Gas Savings Awards, 14 Community GHG Reduction Awards, 4 Agency GHG Reduction Awards, 19 Best Practice Awards, 2,250 number of newsletter subscribers, 2 BPC Spotlight Events, 5,000 website visits, 1,824 SEEC Forum attendees with a total of 18 virtual webinars.

SCG3754 PUB-Ventura County Partnership

Working in conjunction with Southern California Gas Company (SoCalGas), Ventura County Regional Energy Alliance (VCREA) continued as the Local Government "implementing partner" for the Ventura County Partnership Program. VCREA works to coordinate efforts among public agencies, including local jurisdictions (County of Ventura, cities of Camarillo, Fillmore, Moorpark, Ojai, Oxnard, Port Hueneme, Santa Paula, Simi Valley, Thousand Oaks, and Ventura), schools, and special districts, as well as businesses and residents of Ventura County. The Local Government Partnership Program's (LGP) focus is to undertake energy efficiency projects, offer energy efficiency training, support residents through education and outreach, provide assistance to businesses, and consider opportunities for long-term strategic energy efficiency planning as part of the 2013-2020 program cycle. The Partnership Program has been the cornerstone of the VCREA program, providing a strong connection to public agencies and the VCREA mission.

VCREA's mission is to establish Ventura County, its communities, and neighboring regions as the leader in developing and implementing durable, sustainable energy initiatives that support sensible growth, healthy environment and economy, enhanced quality of life, and greater self-reliance for the region by reducing energy demand and increasing energy efficiency practices.

Program successes include: Identified and coordinated with programs to leverage utility incentives for public agencies totaling 20,276 therms savings for city and county projects and

59,774 therms savings for Direct Install (free measures) for K-12 projects with a final total of 80,050 therm savings; and collaborated with Central Coast Climate Collaborative (4C), local Chambers of Commerce, Electric Drive 805 Coalition, County Public Health, The Energy Coalition, Community Environmental Council, South County Energy Efficiency Partnership, ICLEI, Institute for Local Government, and Local Government Commission. With completion of VCGB fourth successful year in operation, VCREA staff have continued to build partnerships with area businesses as well as business-related organizations. Partnerships with local Chambers of Commerce lends authority to the program and allows Chambers to conduct targeted outreach and host education opportunities, thus easing VCREA staff time from program awareness to certification assistance. Staff continued to try and coordinate with utility direct installation programs during pandemic. Due to COVID-19 VCGB pivoted to virtual audits in April and throughout 2020 finished 8 audits and will continue to offer virtual options for business owners. VCGB also delivered 22 recycle bins to the unincorporated area by partnering with the Intergraded Waste Management Division of the County of Ventura. VCGB program participation included 118 Businesses Registered in GreenBizTracker; 45 Businesses Completed Certifications; 8 Businesses Completed Recertifications; and 60 In Process Certifications. Total 2020 savings (excluding City of Ventura) are as follows:

VCREA continued Strategic Planning work efforts for developing Energy Action Plans (EAPs) which included completing City of Ventura, Moorpark, and Thousand Oaks greenhouse gas inventories, receiving approval on the methodology from ICLEI, and developing a methodology report and inventory workbook template to share with other Ventura County jurisdictions. Developing EAP strategies for six energy related sectors; developing EAPs for cities of Ventura, Moorpark, and Thousand Oaks; and developing EAP report templates to share with other Ventura County jurisdictions. VCREA also continued to partner and collaborate efforts with South Santa Barbara County EE Partnership (SCEEP), as well as the Local Government Commission and the support of the CivicSpark fellowship program.

This was our first year to fully focus on SoCalGas programs a lot of this engagement was going to be via meetings and visits to Cities due to the delay in in-person services due to COVID-19, staff switched to virtual outreach and meeting to deliver the program.

In response to the Covid-19 pandemic, Ventura County Green Business program activity was transitioned online until it is safe to resume in-person activities.

VCREA provided outreach and support to residents via phone calls and virtual outreach during the pandemic on energy efficiency best practices as well as programs relevant to pandemic programs from SCG. Numerous virtual events and meetings assisted with continued outreach to local government staff answering their questions and meeting their needs on efficiency and program availability.

After COVID-19-related restrictions are lifted, and full outreach can resume VCREA will continue with the established relationships with VCREA and SoCalGas partners and organizations, so the LGP program can continue to be a trusted resource.

SCG3776 Public – Gateway Cities Partnership

The Gateway Cities Energy Partnership Program (GCELP) is a local government partnership between the Cities of South Gate, Norwalk, Downey, Lakewood, Lynwood, and Santa Fe Springs (the “Cities” or “Partners”) along with and Southern California Gas (SCG). The partnership program works to raise energy efficiency awareness, promote long-term energy reduction goals within municipal building stock and coordinates with partner cities to cross promote residential and business/commercial utility energy efficiency programs. In addition, the partnership program assists local governments in driving targeted retrofit and retro-commissioning projects in municipal facilities.

The following administrative activities were completed for the Gateway Cities energy Partnership. Regular monthly update meetings were held with partner cities and program administrators every month. The partnership initiated 7 one on one meetings with the cities to check-in for status and discuss specific gas projects. The Partnership offered partner staffs the opportunity to participate in the Building Operator Certification Program, and a total of 4 municipal staff members attended. They worked with peer implementers to host 4 webinars focused on therm savings opportunities for agency facilities.

The Partnership did not participate in any community events in 2020 due to current stay-at-home orders. The Partnership had limited opportunities for energy efficiency project development due to COVID-19 pandemic. The partner city staffs work hours were diminished and some moved to part-time. However, they were able to adapt and shift to virtual engagements in the form of webinars and virtual meetings.

There are no program changes in 2020.

The Partnership provided specialized energy efficiency offerings to participating local governments, residential and business communities. The Partnership informed partners and their communities about the wide variety of energy efficiency and demand reduction offerings by SoCalGas.

SCG3779 Public – West Side Community Energy Partnership

The West Side Cities Partnership (WSCP) is a Southern California Gas Company (SoCalGas) Local Government Partnership focused on achieving energy savings and behavior change in residential, commercial, and municipal sectors. The partnership’s three core program elements are consistent with the Master Program Implementation Plan: Government Facilities, California Long Term Energy Efficiency Strategic Plan Activities (Strategic Plan), and Core Program Coordination, and enhancing the leadership role of local governments in energy management. The partnership consists of SoCalGas, the City of Beverly Hills, Culver City, Malibu, Santa Clarita, Santa Monica, West Hollywood, and The Energy Coalition. In addition, the partnership has annual therm savings targets that are achieved through municipal energy efficiency projects.

The Partnership discussed energy projects with city partners through meetings and offline and tracked progress. Developed a SoCalGas program toolkit to house resources and information to inform partner cities, chamber of commerce staff, and community stakeholders of programs that

can support their residents and businesses. And provided program collateral to partner cities to share during outreach events, as well as distributed partnership e-blasts for partner education and training. The Partnership facilitated bi-annual meetings, check-in calls with the cities, and maintained partnership website to serve as a resource for city and utility partners. The Partnership worked with peer implementers to host several webinars focused on therm savings opportunities for agency facilities.

The Partnership had limited opportunities for energy efficiency project development due to relatively low natural gas loads at municipal facilities. COVID-19 pandemic also affected opportunities for in person meetings, event attendance, and workshops. However, they were able to adapt and shift to virtual engagements in the form of webinars and virtual meetings.

There were no program changes in 2020.

The Partnership worked with partner cities to identify and develop energy efficiency projects to build an energy savings pipeline for future years.

SCG3783 Public – Western Riverside Energy Partnership

The Western Riverside Energy Partnership (WREP) is a Partnership between Southern California Gas Company (SoCalGas), Western Riverside Council of Governments (WRCOG) and 18 of its member jurisdictions. The purpose of WREP is to help members identify and implement energy efficiency (EE) projects in municipal facilities as well as provide sustainable best practices to the community.

WREP was able to grow its Partnership by adding the County of Riverside as a new member to support and aid them with any natural gas projects as well as act as a conduit of resources that SoCalGas has to offer.

WREP partnered and coordinated with other Local Government Partnerships to host a webinar titled “Game of Therms”. This educational webinar was implemented between the Gateway Cities Energy Leader Partnership, North Orange Cities Energy Partnership, San Gabriel Valley Energy Wise Partnership, Westside Energy Partnership, and the Western Riverside Energy Partnership.

WREP assisted the City of San Jacinto and City of Eastvale take part in SoCalGas’ Direct Install Program. Through the program measures, the cities were able to save 2,175 therms.

Due to the limitations that the COVID-19 pandemic presented, the Partnership’s outreach and coordination with members had to be modified. WREP and SoCalGas continued to communicate with the members through various virtual channels. One of the channels was WRCOG’s weekly newsletter titled, The Briefing. The newsletter provided a new channel of communication to our partner cities and provided another resource to feature SoCalGas’ programs and offerings. Through the continued virtual engagement, WREP was able to keep members engaged even through the challenges that the pandemic presented.

A few of the goals that WREP was looking to achieve during 2020 were put on hold due to the limitations brought on by the COVID-19 pandemic. Audits and the implementation of various SoCalGas programs were put on hold for a duration of 2020. Additionally, all community events were postponed.

Program changes included having in-person meetings transitioned into virtual meetings. Additionally, audits and community events were put on hold due to the COVID-19 pandemic.

WREP held two quarterly meetings in 2020. One of them was done in collaboration with neighboring Local Government Partnership (LGP), San Bernardino Regional Energy Partnership (SBREP). WREP was able to increase its outreach and program support through virtual meetings, increased promotion of SoCalGas webinars, and joint coordination with three other Local Government Partnerships to provide resources to members. Additionally, WREP assisted the City of San Jacinto and City of Eastvale take part in SoCalGas' Direct Install Program. Through the program measures, the cities were able to save 2,175 therms.

SCG3801 Public – North Orange County Cities Partnership

The North Orange County Cities (NOCC) Energy Partnership is a Southern California Gas Company (SoCalGas) Local Government Partnership focused on achieving energy savings and behavior change in residential, non-residential, and municipal sectors. The NOCC Energy Partnership's three core program elements are consistent with the Master Program Implementation Plan: Government Facilities, California Long Term Energy Efficiency Strategic Plan Activities (Strategic Plan), and Core Program Coordination, and enhancing the leadership role of local governments in energy management.

The NOCC Energy Partnership consists of SoCalGas, the eight cities of Brea, Buena Park, Fullerton, La Habra, La Palma, Orange, Placentia, Yorba Linda, and The Energy Coalition. NOCC has annual therm savings targets that are achieved through municipal energy efficiency projects.

The program's successes include: Worked with the City of Orange to replace boilers at police headquarters; Discussed energy projects with city partners through meetings and offline and tracked progress; Promoted and coordinated participation of Direct Install Program at the City of Orange; Developed a SoCalGas program toolkit to house resources and information to inform partner cities, chamber of commerce staff, and community stakeholders of programs that can support their residents and businesses; Provide program collateral for partner cities to share with residents at outreach events; Distributed Local Government Partnership e-blasts for partner education and training; Facilitated bi-annual partnership meetings and city check-in calls with partner cities; Maintained partnership website to serve as a resource for city and utility partners; Held a two part webinar series on SoCalGas residential and commercial program offerings to provide partner cities and stakeholders with resources to better serve their communities; Worked with peer implementers to host a webinar focused on therm saving opportunities at agency facilities; And coordinated delivery of SoCalGas residential program materials at various community outreach events.

Some program implementation barriers and problems encountered in 2020 include: Limited opportunities for energy efficiency project development due to relatively low natural gas loads at municipal facilities; and COVID-19 pandemic affected opportunities for in-person meetings, event attendance and workshops. However, TEC was able to adapt and shift to virtual engagement in the form of webinars, zoom meetings, and virtual toolkits.

There were no program changes made in 2020.

In 2020, the NOCC Partnership and its member cities and agencies participated in energy efficiency rebates and incentives with retrofit projects in support of savings to the Public Deemed program.

SCG3802 Public – San Bernardino Regional Energy Partnership

The San Bernardino Regional Energy Partnership (SBREP) is a joint partnership between San Bernardino Council of Governments (SBCOG) and Southern California Gas Company (SoCalGas). The Partnership was approved and added to the Local Government Program (LGP) for SoCalGas in April 2015. The Partnership provides an Energy Efficiency (EE) Partnership program to 13 cities within the San Bernardino Valley and Morongo Valley portions of the SBCOG region. Participating cities include: Chino, Chino Hills, Colton, Fontana, Highland, Montclair, Rancho Cucamonga, Redlands, Rialto, San Bernardino, Twentynine Palms, Upland and Yucca Valley. The primary objectives for the Partnership includes 1) Promoting integrated EE through identifying/assisting in the coordination of opportunities for cost-effective implementation of natural gas technologies; 2) Coordinating community outreach and training efforts to educate consumers and promote programs; and 3) Identifying/offering financial packages that bundle practical utility incentives, with various monetary incentives aimed at improving the participation of residents, businesses and local government agencies.

As a result of the COVID-19 pandemic, and the various limitations that the pandemic presented, the Partnership's outreach and coordination with its cities was modified in 2020. The San Bernardino Regional Energy Partnership (SBREP) and SoCalGas continued to communicate with the cities throughout 2020 with various email notifications to inform and promote an assortment of energy efficiency opportunities/webinars.

In addition, the Partnership was able to provide Building Operator Certification (BOC) Level 1 and Level 2 virtual training in 2020 for its energy efficiency city staff representatives, as well as a joint virtual technology meeting with Western Riverside Council of Governments (WRCOG).

The Partnership reached out to the participating SBREP cities to support possible community events and assist with the preparation for the holiday EE starter kit events, however, due to COVID-19, these activities were cancelled by the cities and did not take place.

Due to the COVID-19 pandemic and the various limitations/restrictions that were put in place to reduce the transmission of the virus, the Partnership worked to promote outreach and energy efficiency information to the SBREP cities through various virtual and electronic channels such as emails, phone calls, newsletters, and webinars.

Due to COVID-19, program outreach with the SBREP cities was addressed through a variety of emails, phone calls and a joint virtual technology meeting with WRCOG.

While we did not meet our therm savings goal, the Partnership continued to engage actively with partner cities. This included the City of Colton joining the Partnership in 2020, as well as being able to offer Building Operator Certification (BOC) Level 1 and Level 2 virtual training to the SBREP cities.

Non-Partnership Public Sector Programs

SCG3815 Public – Calculated Incentives

The SoCalGas Public Calculated Incentive program focuses on customized incentives for the public sector. Incentives are paid on the energy savings above and beyond baseline energy performance, which include state-mandated codes, federal-mandated codes, industry accepted performance standards, or the other baseline energy performance standards.

The Public Calculated Incentives program leveraged improvements made in 2019 to continue to make the required package uploads for selected projects. The Public Calculated Incentives program participated in the small project subgroup in 2020.

The Public Calculated Incentive program continues to see a decrease in the number of applications. The plan is to continue to promote Metered and Performance-Based Retrofits Program as a High Opportunity Program (HOPP – MPRB) as a way to increase application in 2021.

The Public Calculated Incentive program did not experience any change in 2020.

SCG3816 Public – Deemed Incentives

The Public Deemed Incentives Subprogram offers rebates to public Sector customers in an easy-to-use mechanism to offset the cost of off-the-shelf energy saving equipment to cost-effectively subsidize and encourage adoption of mass market efficiency measures through fixed incentive amounts per unit/measure.

Using itemized EE measures was intended to overcome barriers that prevent many business customers from adopting EE alternatives. The barriers were addressed by itemizing common EE measures and rebates, stimulating the supply of high efficiency equipment and products (through higher demand), and offering rebates that help offset higher start-up and down payment expenses for energy efficient retrofits.

In early 2020, Local Government Partners were offered an additional 50% incentive kicker to attract more public sector organizations to the program. By year-end 2020, the 50% kicker was

made available to all public sector customers to offer monetary support as a response to the COVID-19 pandemic.

The commercial hot water boiler and pool covers were the primary measures for deemed energy savings in 2020 for the public sector.

SCG3817 Public – Direct Install Program

Program Description: The SoCalGas Public Direct Install Program is a cost-effective source of therms for SoCalGas through the installation of direct install energy efficiency measures to nonresidential public ratepayers. These include K-12 schools and municipal facilities. After the installation of complimentary direct install measures, the program segues to advanced energy efficiency co-pay measures that can be financed using SoCalGas's On-Bill Financing.

Program Successes: Some of the program's successes include establishing a long-term partnership with Los Angeles Unified School District, achieving a TRC greater than 1.7, and building positive momentum for the implementation of the new 2021-2023 SoCalGas Public Direct Install Program.

Program Implementation Barriers or Problems Encountered: COVID-19 impacted the work that had previously been scheduled with the City of Rancho Cucamonga in late 2020. COVID-19 also made it difficult to coordinate promotion and commitments of advanced energy-efficiency appliances with K-12 schools and municipal decision makers.

Program Changes Made in 2020: The SoCalGas Public Direct Install Program came to fruition in the second half of 2020 as part of a bifurcation of the SoCalGas Commercial Direct Install Program.

Program Objectives Met: The program achieved net therm savings, gross therm savings, and increased its number of project installations.

Energy Atlas

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

Recent Developments

In D.18-05-041, the Commission directed the IOU Program Administrators, under the leadership of Southern California Edison, to oversee the statewide deployment of a tool akin to the Energy Atlas, now referred to as "CATALENA." The program's goal is to competitively solicit a third party to implement CATALENA's deployment, maintain its data quality, consistency, and

security, and continue development of the Energy Atlas's capabilities. D.18-05-041 also directs the IOU PAs to:

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

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

Water Energy Nexus

In 2020, SoCalGas has continued its diverse offering of programs that educate on water savings, delivering energy savings measures associated with the savings of hot water, as well as partnering with water agencies for cross-promotion.

In 2020, SoCalGas has continued its diverse offering of programs that educate on water savings, delivering energy savings measures associated with the savings of hot water in various programs, as well as partnering with water agencies for cross-promotion. In Water Utility Partnering Activities SoCalGas has maintained several water-energy nexus activities and partnerships. This year, SoCalGas also became a member of CALWEP and participated in its member only peer-to-peer workshop.

In 2020, SoCalGas continued its partnership with Los Angeles Water and Power (LADWP) and Los Angeles Metropolitan Water District (MWD) to co-deliver water energy nexus activities. These activities include the Energy Smart Landscape seminars co-taught with MWD. SoCalGas continued its partner program with MWD where low-income customers receive water savings rebates from MWD through SoCalGas' ESA low-income program.

The LADWP/SoCalGas water energy nexus partnership continued its Southern California Gas Company 2020 Energy Efficiency Programs. Together with LADWP, SoCalGas' Residential – EE Kits program helped customers with continued water energy savings and conservation, SoCalGas offered no-cost EE kits to eligible SoCalGas customers. The SoCalGas EE kit program was able to distribute over 241,000 EE kits in 2020 in partnership with LADWP helping customers save energy through the use of low flow showerheads and water saving kitchen and faucet aerators.

Other Water Energy Related Program Activities

In 2020, SoCalGas continued its offering of energy efficiency measures that can achieve direct water savings to residential and non-residential customers. Many of these measures are approval through the Energy Division's Ex Ante Review team for use with the Water-Energy calculator to report embedded energy savings. These measures are listed in the table below:

EE Program Sector	Measures Offered that Achieved Direct Water Savings
Residential	Auto-Diverting Tub Spout with Thermostatic Shut-off Valve
	High Efficiency Clothes Washer
	Low Flow Shower head
	Residential Faucet Aerator
	Water Kit
Commercial	Commercial Faucet Aerator
	Gas Combination Over
	Gas Pleasureless Steamer
	Laminar Flow Restrictor
	Low Flow Pre-Rinse Spray Valve
	Ozone Laundry

SoCalGas will continue its plans to expand its offer of EE measure offerings which can achieve direct water savings to residential and non-residential customers in 2021 through newly developed deemed EE savings measure workpapers and/or other water-energy activities.

Budget

Program expenditures are not broken out by measure or by water energy related activities. Rather, they are included in the overall expenditures listed in Table 3 of "Section 3: Expenditures" of this annual report, for the following programs listed below:

SCG3702 RES-Plug Load and Appliance
SCG3703 RES-Plug Load and Appliances - POS
SCG3705 RES-Home Upgrade Program
SCG3707 RES-RNC
SCG3711 COM-Deemed Incentives
SCG3831 Residential -EE Kits
SCG3761 3P-MF Home Tune Up
SCG3762 3P-CLEO
SCG3763 3P-MF Direct Therm Savings
SCG3764 3P-Livingwise
SCG3765 3P-Manufactured Mobile Home
SCG3793 3P-IDEEA365-Instant Rebates!
SCG3805 COM-Direct Install Program
SCG3807 COM-HOPPS-CRR Program

Statewide Programs

Under the context of the energy efficiency rolling portfolio overseen by the investor-owned utilities, D.18-01-004, approved the solicitation process for procurement of energy efficiency programs for the next several years and beyond. The decision requires the utilities to have at least 60 percent of their energy efficiency portfolio budgets designed and implemented by third party implementers by the end of 2022. The IOUs participated in statewide coordination with each other throughout all of last year, and that effort will continue into 2021 and beyond.

To that end, SoCalGas began the solicitation of three statewide programs in 2020: SW FS POS, SW MS WH, and SW GET. They are described below.

SoCalGas is the program administrator for three statewide programs in the Statewide Food Service Point of Sale (SW FS POS), the Statewide Mid-Stream Water Heating (SW MS WH), and the Statewide Gas Emerging Technologies (SW GET) sectors.

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

The program for the SW MS WH sector is the SW WH Program. It is a distributor-centric model design, which will collaborate with a network of distributors that specialize in the sale of efficient electric and natural gas measures. Point-of-sale discounts and incentives will be paid at the midstream level to distributors based on transactions and sales to contractors. All customers with commercial rate structures served by one of California’s four IOUs are eligible for program participation.

There is not yet an identified program for SW GET, as the solicitation for the program went out for bid in December 2020.

Advice Letters for SW FS POS and SW MS WH programs were filed with the Commission on December 15, 2020, and December 4, 2020, respectively. The SW FS POS Advice Letter was approved January 14, 2021. The SW MS WH Advice Letter, following two protests by stakeholders, was suspended on December 30, 2020, and was approved on March 18, 2021. The SW GET program was put out for bid in December 2020.

Below is a list of the SW programs and their respective statuses. Following that are narratives for SW programs led by other IOUs in California that had activity in 2020. The narratives of the other three IOUs are identical to what they each have filed in their respective EE annual reports.

Status of Upcoming Statewide Programs

Program Category	Lead IOU	Status
Plug Load and Appliance	SDG&E	Contract Negotiations

HVAC (Upstream Residential, Upstream Commercial)	SDG&E	Launched Q2 2021
New Construction (Residential)	PG&E	Contract Negotiations
Lighting	SCE	Estimated Launch Q2 2021
Emerging Technology (Gas)	SoCalGas	Contract Negotiations
Emerging Technology (Electric)	SCE	RFP into Q2 2021
Workforce Education & Training	PG&E	Estimated Launch Q2 2021
Institutional Partnerships (Higher Education)	SCE	RFP Scheduled to Launch June 2021
Institutional Partnerships (State of California / Department of Corrections)	PG&E	Contract Negotiations
Foodservice Point of Sale	SoCalGas	Launched April 2021
Midstream Commercial Water Heating	SoCalGas	Estimated Launch May 2021

Status of Upcoming Statewide Pilots

Program	Lead IOU	Status
HVAC Quality Installation/Quality Maintenance (QI/QM)	SDG&E	RFP Scheduled to Launch Q1 2022
Water/Wastewater Pumping Program	SCE	RFP Scheduled to Launch Q3 2021
Career and Workforce Readiness	PG&E	Estimated Launch June 2021

San Diego Gas & Electric:

SW Upstream HVAC:

SDG&E is the lead administrator for the Statewide Upstream HVAC program, an upstream and midstream program that will offer HVAC measures including high-efficiency commercial unitary air conditioners, commercial heat pumps, commercial chillers, commercial space heating boilers, residential air conditioners, residential heat pumps, residential gas furnaces and residential gravity wall furnaces. The Program captures savings through the movement of

incentivized deemed measures. The Statewide Upstream HVAC Program was contracted on 10/14/2020 with CLEAResult for \$36.9M over a three-year contract period. SDG&E filed the Advice Letter (3648-E) on 11/12/2020 and it was approved on 12/11/2020. The program is expected to launch in Q2 of 2021.

SW Plug Load and Appliances (PLA):

SDG&E is the lead administrator for the Statewide Plug Load and Appliance program. The RFP for the solicitation was released on 1/27/2020. The solicitation is currently on going and it's anticipated that contracting will be completed in Q2 2021.

Pacific Gas & Electric:

In compliance with D.18-05-041, Ordering Paragraph 53, SoCalGas does not participate in the statewide codes and standards programs described below. The following information is provided by the Statewide Lead, PG&E:

State Building Codes Advocacy: Title 24, Part 6 & Part 11

The Statewide Building Codes Advocacy subprogram supports the California Energy Commission's triennial update to the Energy Code (Title 24, Part 6) to include new EE regulations or to strengthen existing regulations for various technologies or measures. Advocacy activities include the development of Codes and Standards Enhancement (CASE) proposals, research to provide the data needed to advance EE regulations, and participation in the public rulemaking processes. The subprogram also supports the Energy Commission in preparing recommendations to the Building Standards Commission to updates the California Green Buildings Standards (Title 24, Part 11 or CALGreen). The voluntary energy measures in CALGreen provide foundational elements for local reach codes.

To comply with the Commission's Statewide program and outsourcing goals⁸, PG&E's Building Code Advocacy subprogram prepared transitioned to a Statewide Codes and Standards Advocacy program, which commenced in early 2020. Activities completed to support this included the introduction of a statewide balancing account, budget sharing negotiation, administrative costs agreements, and the continued implementation of contracts that were awarded as part of the public third-party bid process that occurred in 2019.

(i) 2020 Strategies and Successes

PG&E has been a participant in the code-setting process since the Energy Code was first developed in the 1970s. PG&E is also part of the statewide IOU team that supports the development of the Energy Code. In 2020, Sacramento Municipal Utility Department (SMUD) and Los Angeles Department of Water and Power (LADWP) contributed support for the 2022 Energy Code rulemaking cycle and are listed as part of the statewide team on public documents.

⁸ D.18-05-041

In 2020, the Statewide Utility Codes and Standards Program supported the Energy Commission’s 2022 rulemaking by completing 24 Codes and Standards Enhancement (CASE) reports that support 86 building code measure proposals. The focus for the 2022 cycle is on multifamily and non-residential buildings. Single family CASE reports proposed measures for alterations and additions, as well as compliance options that will prepare for prescriptive or mandatory measures in the 2025 and 2028 cycles. Final CASE reports were submitted to the Energy Commission for review in the third quarter of 2020. A list of measures and the final CASE reports are available at [Title24Stakeholders.com](https://www.title24stakeholders.com). This public website was redesigned for the 2022 rulemaking cycle to increase and encourage stakeholder participation in the process. From March 2020 to March 2021, the website received over 490,000 visits from 31,000 unique visitors – more than twice the traffic of the previous period.

In 2020, from March 3 to May 7, the Statewide CASE team hosted 11 online events in ten weeks to engage with stakeholders that may be impacted by the proposed code changes. In spite of hosting these at the start of the COVID-19 crisis, the online convenings were well attended. Online meeting attendance in this second round of utility-sponsored stakeholder meetings increased after the March 19th stay-at-home orders were issued. The 2020 stakeholder meetings included 1,101 total attendees, 559 unique individuals representing 312 unique companies. There was a 33 percent increase in unique attendees during the second round of meetings. The outreach efforts led to 1101 total attendees for all 11 meetings, including 187 new individuals and 155 new organizations. The meetings had 65% average attendance rate, which is well above the industry average of 40-50%. 28 email campaigns to share information about the 2022 code cycle led to an open rate of 25 percent and a click through rate of 14 percent, which is aligned with industry averages.

At the start of 2021, the expected energy savings from the total proposal package across non-residential, multifamily, and single-family buildings is 1,186 GWh in Electricity Savings, 182 MW in Peak Demand Reduction, 17 MMTherms in Natural Gas Savings, and 377,958 metric tons CO₂e in GHG reductions. Notable measure updates for this cycle include:

- Multifamily
 - Unification of MF requirements in one section of code, which addresses compliance challenges and establish a framework that will allow for code requirements to be appropriately tailored for MF buildings in future code cycles
 - Supported move to all electric baselines.
 - Maintained commitment to maintaining indoor air quality.
- Single Family
 - Focus on recommendations for additions and alterations, which is an important step as we turn attention to how to achieve savings from existing buildings.
- Nonresidential
 - Covered Processes: The CEC pursued more covered process measures this cycle than they typically pursue. The covered process measures represent a significant savings opportunity, but they also require more advocacy support as many are expanding the scope of Title 24. Measures include controlled environment horticulture (290 GWh – the most of all measures), compressed air, steam trap monitoring, and refrigeration system opportunities.

- Energy Efficiency: Pursued cost-effective efficiency improvements including requirements for envelope, lighting, HVAC, and water heating. For lighting, cleaning up the lighting power density requirements will complete the transition to using LEDs as the baseline in all newly constructed buildings.
- Controls: Pursued control requirements that will enable load management, heat recovery, ventilation controls, and savings during unoccupied periods. Establishing requirements for dedicated outdoor air systems (DOAS) was an important step to set a minimum requirement for a technology that is gaining market share particularly in all electric buildings.

The adoption of the 2022 Energy Code is expected by August 2021. Savings expectations will be recalculated based on the final code language. The Statewide CASE Team will support the measure package and the Energy Commission through adoption, then turn to assisting with the compliance manuals and other supporting elements necessary for implementation. The Statewide CASE Team is also supporting the Energy Commission’s CALGreen (Title 24, Part 11) voluntary measure package development with several options for cities seeking to adopt reach codes to help meet local decarbonization goals. This package is expected to be submitted to the Energy Commission in the second quarter of 2021. Planning for the 2025 Energy Code cycle begins in 2021.

State Appliance Standards Advocacy Subprogram

The Statewide Appliance Standards Advocacy (ASA) subprogram targets improvements to Title 20 by the California Energy Commission. Advocacy activities include developing Title 20 code enhancement proposals and participating in the California Energy Commission public rulemaking process. Additionally, the subprogram monitors state and federal legislation and intervenes, as appropriate.

To comply with the Commission’s Statewide program and outsourcing goals⁹, PG&E’s Appliances Standards Advocacy subprogram ramped down in 2019 to shift budget and activity to the new statewide State Appliance Standards Advocacy program, which launched in Q1 2020.

2020 Strategies and Successes

In 2020, the ASA pursued several specific subprogram efforts. The ASA program staff participated in several Energy Commission webinars and workshops and advocacy for the Energy Commission rulemakings on a couple of products: 1) dedicated purpose pool pump motors, 2) computers and IOUs supported the adoption of the dedicated purpose pool pump motors and computers standards through advocacy, data analysis and data collection.

National Codes and Standards Advocacy

PG&E advocates for national building codes and appliance standards that support California by encouraging adoption of transformative technologies and construction processes. Alignment between national and state codes also helps reduce barriers to compliance by harmonizing the requirements across state borders. Organizations that work across multiple states, including California, can establish business practices that would result in less customization for the

⁹ D.18-05-041

California market. Participation in the DOE, Environmental Protection Agency (EPA), Federal Trade Commission (FTC), ASHRAE and IECC code and standard update proceedings in support of increasing requirements is important to minimize gaps, when regionally appropriate, between the California's EE regulations and the EE regulations that other states adopt.

To comply with the Commission's Statewide program and outsourcing goals¹⁰, PG&E's National Code Advocacy subprogram shifted budgets and activity to the new Statewide model in early 2020 with the completion of the implementer bidding process and establishment of statewide balancing accounts to share proportional costs amongst IOUs.

2020 Strategies and Successes

PG&E responded to the DOE rulemakings and supported our positions with data. PG&E collaborated with stakeholders and shared any data collected with DOE and their consultants. This collaboration supports rooftop HVAC (heating, ventilation, and air conditioning) units, DX dedicated outdoor air systems, residential refrigerator, commercial and industrial boilers, and variable speed HVAC test procedures. PG&E also completed the test plan for TV test procedures.

Additionally, this program advocated for changes to federal appliance standards through multiple efforts. Program staff researched and responded to specific issues related to federal rulemaking and specification processes conducted by the DOE and EPA ENERGY STAR[®] and participated in stakeholder meetings during rulemakings and specifications processes, resulting in 32 rulemaking advocacy letters issued in 2020.¹¹

The program supported implementer participation in the Mechanical Subcommittee (MSC) of ASHRAE SSPC 90.1 and attended all meetings of the full committee as a non-voting member. Also, the implementer attends meetings of the Envelope Subcommittee of SSPC 90.1. Work on significant addendums that are nearing completion include:

- Significantly reduced fan power consumption by increasing the scope and stringency of the Fan Power Limits in Section 6.5.3.1
- Increased minimum efficiency of high-capacity water heaters in large buildings from 90 percent to 92 percent thermal efficiency.
- Served as a member of the SSPC 90.1 Energy Credits Working Group, which creates additional requirements through a flexible path for prescriptive measures beyond those found in the standard's chapters.
- Provided direction for building modeling support of the Mechanical (MSC) and Lighting (LSC) Subcommittees' addenda and provided guidance on the creation and cost justification for significant addenda based on already-existing Title 24, Part 6 CASE studies. Examples of this work include support for adjustments to the requirements for compressor systems, updates to lighting controls requirements and lighting power density values, and providing support for proposals to reduce

¹⁰ D.18-05-041

¹¹ Several of the advocacy letters were submitted on the same topic to respond to DOE's ongoing rulemakings.

exceptions and expand the scope of alterations to which controls and lighting power requirements apply.

In addition, implementer efforts to advance Standard 189.1-2020 resulted in reductions to the general lighting power allowance to approximately 10% below those of the ASHRAE / ANSI / IES 90.1 allowances, adding high-rise multifamily dwelling unit lighting control requirements, multi-zone occupancy sensing controls for large office lighting, and limiting SHGC derating based on window orientation. The implementer also supported expansion of distributed energy resources by increasing the prescriptive and performance renewable energy requirements to approximately 50% of the total energy consumption. The team participated in the development for source energy factors and carbon emission factors that mirrored efforts for the 2022 Energy Code development, including treating renewables as having no source energy and using the 20-year GWPs for short-lived climate pollutants such as methane.

Southern California Edison:

Southern California Edison (SCE) CA Statewide Lighting Program -

The California Statewide Lighting Program (SWL Program) serves all eligible electric customers in the participating IOUs' service territories – Southern California Edison (SCE), San Diego Gas & Electric (SDG&E), and Pacific Gas & Electric (PG&E). The goal of the SWL Program is to promote the sale and installation of high efficiency lighting products through midstream channels. The third-party implementer, TRC Solutions, will achieve the Program's objectives through implementation of a cost-effective midstream program for the non-Residential, Commercial & Industrial (C&I) market throughout the IOUs' service areas.

SCE submitted Advice Letter AL 4356-E12 in 2020 to request approval for its California Statewide Lighting Program solicitation, and received a CPUC disposition letter approving the request, effective December 23, 2020. The Program, administered by TRC Solutions, is set to launch in Q2 2021.

SCE has several active solicitations as of the date of this report, including Statewide Electric Emerging Technologies, Local Public Sector, Local Agricultural Sector, Statewide Higher Education, and Statewide Water/Wastewater.

Statewide Higher Education Program

SCE began solicitations for the Statewide Higher Education programs and will continue in 2021

Water/ Wastewater Pumping Program

SCE began solicitations for Water/ Wastewater Pumping program and will continue in 2021.

Electric Emerging Technologies Program

SCE began solicitations for Electric Emerging Technologies program and will continue in 2021.

¹² SCE AL 4356-E, Advice Letter for Approval of Statewide Lighting Energy Efficiency Third Party Contract for CA Statewide Lighting Program, https://library.sce.com/content/dam/sce-doelib/public/regulatory/filings/approved/electric/ELECTRIC_4356-E.pdf

SECTION 1 ENERGY SAVINGS

The purpose of this table is to report the annual impacts of the Energy Efficiency portfolio of programs implemented by SoCalGas for the 2020 year. The annual impacts are reported for 2020 in terms of annual net and lifecycle net energy savings in natural gas savings in MMTh (million therms). The report shows annual savings (Installed Savings) that reflect installed savings, not including commitments. The values in the Installed Savings column include savings from the Low-Income Energy Savings Assistance Program, and Codes and Standards work (Low Income ESA and C&S savings are broken out as separate line items in Table 6 - Savings by End-Use).

Table 1

A	B	C	D
Table 1			
<i>Electricity and Natural Gas Savings and Demand Reduction (Net)</i>			
Annual Results	2020 Installed Savings	CPUC 2020 Adopted Goals (D.19-08-034)	% of Goals (2020)
<i>2020 Energy Savings (GWh) – Annual</i>	<i>1.8</i>		
<i>2020 Energy Savings (GWh) – Lifecycle</i>	<i>19.2</i>		
<i>2020 Natural Gas Savings (MMth) – Annual [2][3][4]</i>	<i>46.5</i>	<i>34</i>	<i>137%</i>
<i>2020 Natural Gas Savings (MMth) – Lifecycle [2]</i>	<i>417.1</i>		
<i>2020 Peak Demand savings (MW)</i>	<i>0.2</i>		

[1] Results from activity installed by programs implemented in 2020 only.

[2] Includes savings associated with SoCalREN, 3C-REN, Low Income Energy Savings Assistance, and Codes and Standards programs.

[3] Net Codes & Standards program savings for 2020 includes the 5% market effects adder as calculated in CEDARS. Net Codes & Standards program savings without market effects is 16,859,580 therms.

[4] Net Energy Savings Assistance program savings for 2020 includes the 5% market effects adder as calculated in CEDARS. Net energy savings without market effects is 702,911 therms.

SECTION 2 EMISSION REDUCTIONS

The purpose of this table is to report the annual incremental environmental impacts of the Energy Efficiency portfolio (for both electricity and natural gas) of programs implemented by SoCalGas during the 2020 program year. Parties agreed that the impacts should be in terms of annual and lifecycle tons of CO₂, NO_X, and PM₁₀ avoided and should come from the cost-effectiveness tool.

Table 2

A	B	C	D	E	F	G
Table 2						
<i>Environmental Impacts (Net)</i>						
Annual Results	Annual tons of CO2 avoided	Lifecycle tons of CO2 avoided	Annual tons of NOx avoided	Lifecycle tons of NOx avoided	Annual tons of PM10 avoided	Lifecycle tons of PM10 avoided
SoCalGas 2020 [2]						
2020 Total [3]	267,724	2,381,262	338,798	2,747,929	64	664

[1] Results from activity installed by programs implemented in 2020 only.

[2] Portfolio targets were not established for 2020 in SoCalGas' Compliance Advice Letter 5510, approved on December 20, 2019.

[3] Environmental impacts do not include impacts associated with SoCalREN, 3C-REN, or Low Income Energy Savings Assistance programs.

SECTION 3 EXPENDITURES

The purpose of this table is to report the annual costs expended by SoCalGas in implementing the 2020 Energy Efficiency portfolio. The report is broken out into the Administrative Costs, Marketing/Education/Outreach Costs, and Direct Implementation Costs categories.

This table also includes budget and expenditure dollars outside of portfolio for:

1. SW ME&O,
2. Financing Programs/Pilots, and
3. Energy Savings and Assistance Program.

SECTION 4 COST-EFFECTIVENESS

The purpose of this table is to provide an annual update on the cost-effectiveness of the portfolio of programs being implemented in the 2020 program year. The targets above are at the portfolio level, so an annual average is used in order to compare the current annual estimates of cost-effectiveness with the cost-effectiveness levels that were estimated at the time the portfolios were adopted. The report includes the SoCalGas results and goals.

Table 4

A	C	B	D	E	F	G	H	I	J	
Table 4										
<i>Cost Effectiveness (Net)</i>										
Annual Results	Total Benefits (TRC/PAC)	Total TRC Cost	Net TRC Benefits	TRC Ratio	Total PAC Cost	Net PAC Benefits	PAC Ratio	PAC Cost per kW Saved (\$/kW)	PAC Cost per kWh Saved (\$/kWh)	PAC Cost per therm Saved (\$/therm)
SoCalGas 2020										
2020 TOTAL [1][2][3][4]	\$ 314,360,915	\$ 206,436,810	\$ 107,924,105	1.52	\$ 90,535,344	\$ 223,825,571	3.47	N/A	N/A	\$ 0.37

[1] Results from activity installed by programs implemented in 2020 only.

[2] Portfolio targets were not established for 2020 in SoCalGas' Compliance Advice Letter 5510, approved on December 20, 2019.

[3] Excludes costs and benefits associated with Low Income Energy Savings Assistance Programs, Emerging Technologies Programs, SoCalREN, and 3C-REN.

[4] In accordance with D.17-03-026, excludes costs from SoCalGas' Financing pilot program (SCG3737 and SCG3803) which are considered outside of the EE portfolio.

SECTION 5 BILL PAYER IMPACTS

The purpose of this table is to report the annual impact of the energy efficiency activities on customer bills relative to the level without the energy efficiency programs, originally required by Rule X.3 of the Energy Efficiency Policy Manual Version 3, adopted in D.05-04-051. Impacts for this section are based on net energy efficiency activities for 2020.

Table 5

A	B	C	D	E
Table 5				
<i>Ratepayer Impacts (Net)</i>				
	Electric Average Rate	Gas Average Rate (Core	Average First Year	Average Lifecycle Bill
2020	(Res and Non-Res)	and Non-Core)	Bill Savings (\$)	Savings (\$)
	\$/kwh	\$/therm		
SoCalGas	N/A	\$1.30	\$60,507,203	\$542,669,487

[1] SoCalGas' 12-month average transportation rate in 2020 was \$1.02379 per therm.

[2] SoCalGas' 12-month average procurement rate in 2020 was \$0.27723 per therm.

[3] Ratepayer impacts are derived from 2020 net savings accomplishments and the average rate.

[4] The average First Year Bill Savings are calculated by the 2020 first year savings multiplied by the Gas Average Rate.

[5] The average Lifecycle Bill Savings are calculated by the 2020 lifecycle savings multiplied by the Gas Average Rate.

SECTION 6 SAVINGS BY END-USE

The purpose of this table is to show annual portfolio savings by Residential and Non-Residential end-uses and those savings attributable to the Low-Income Energy Savings Assistance Program, and Codes and Standards work.

Table 6

A	B	C	D	E	F	G
Table 6						
<i>Annual Savings By End-Use 2020 Only (Net) [1][2]</i>						
Use Category	GWH	% of Total	MW	% of Total	MMTh	% of Total
Appliance or Plug Load	0.01	0%	0.00	1%	0.11	0%
Building Envelope	0.04	2%	0.01	8%	0.09	0%
Compressed Air	-	-	-	-	-	-
Commercial Refrigeration	-	-	-	-	-	-
Codes & Standards	-	-	-	-	18.37	40%
Food Service	0.02	1%	0.00	2%	1.03	2%
HVAC	1.78	96%	0.11	65%	0.34	1%
Irrigation	-	-	-	-	-	-
Lighting	-	-	-	-	-	-
Non-Savings Measure	-	-	-	-	-	-
Process Distribution	-	-	-	-	0.24	1%
Process Drying	-	-	-	-	0.02	0%
Process Heat	-	-	-	-	3.85	8%
Process Refrigeration	-	-	-	-	-	0%
Recreation	-	-	-	-	0.12	0%
Service	-	-	-	-	-	-
Service and Domestic Hot Water	(0.07)	-4%	(0.01)	-5%	6.48	14%
Whole Building	0.07	4%	0.05	29%	14.99	32%
Low Income Energy Efficiency	-	-	-	-	0.74	2%
SoCalREN	-	-	-	-	0.13	0%
3C-REN	-	-	-	-	0.00	0%
SoCalGas ANNUAL PORTFOLIO	1.84	100%	0.17	100%	46.51	100%

[1] Results from activity installed by programs implemented in 2020 only.

[2] Includes savings associated with SoCalREN, 3C-REN and Low Income Energy Savings Assistance programs.

[3] Net Codes & Standards program savings for 2020 includes the 5% market effects adder as calculated in CEDARS. Net Codes & Standards program savings without market effects is 16,859,580 therms.

[4] Net Energy Savings Assistance program savings for 2020 includes the 5% market effects adder as calculated in CEDARS. Net Codes & Standards program savings without market effects is 702,911 therms.

SECTION 7 COMMITMENTS

The purpose of this table is to allow the utilities to report commitments which will be produced within the 2021 program year (commitments entered into during the previous and current program cycle but which are not expected to produce installed savings until after December 2020). This information will be useful for the Commission's resource planning purposes by enabling program activities to be linked to a particular funding cycle.

Table 7

A	B	C	D	E
Table 7				
<i>Commitments</i>				
Commitments Made in the Past with Expected Implementation after December 2010-2012				
	Committed Funds	Expected Energy Savings (Net)		
2010-2012 [2]	\$	GWH	MW	MMth
Resource	853,424	0	0	0.00
Non-Resource	103,435	0	0	0
Codes & Standards	-	0	0	0
SoCalGas Total	956,859	0.00	0.00	0.00
Commitments Made in the Past Year with Expected Implementation after December 2013-2015				
	Committed Funds	Expected Energy Savings (Net)		
2013-2015 [1]	\$	GWH	MW	MMth
Resource	-	0	0	0.00
Non-Resource	-	0	0	0
Codes & Standards	-	0	0	0
SoCalGas Total	-	0.00	0.00	0.00
Commitments Made in the Past Year with Expected Implementation after December 2016				
	Committed Funds	Expected Energy Savings (Net)		
2016 [1]	\$	GWH	MW	MMth
Resource	-	0	0	0.00
Non-Resource	-	0	0	0
Codes & Standards	-	0	0	0
SoCalGas Total	-	0.00	0.00	0.00
Commitments Made in the Past Year with Expected Implementation after December 2017				
	Committed Funds	Expected Energy Savings (Net)		
2013-2017 [1][3][7]	\$	GWH	MW	MMth
Resource	9,941,484	0	0	1.63
Non-Resource	4,801,492	0	0	0
Codes & Standards	73,078	0	0	0
SoCalGas Total	14,816,054	0.00	0.00	1.63
Commitments Made in the Past Year with Expected Implementation after December 2018				
	Committed Funds	Expected Energy Savings (Net)		
2018 [4][7]	\$	GWH	MW	MMth
Resource	1,484,549	0	0	0.03
Non-Resource	40,548	0	0	0
Codes & Standards	-	0	0	0
SoCalGas Total	1,525,098	0.00	0.00	0.03
Commitments Made in the Past Year with Expected Implementation after December 2019				
	Committed Funds	Expected Energy Savings (Net)		
2019 [5][7]	\$	GWH	MW	MMth
Resource	285,497	0	0	0.01
Non-Resource	647,875	0	0	0
Codes & Standards	-	0	0	0
SoCalGas Total	933,371	0.00	0.00	0.01
Commitments Made in the Past Year with Expected Implementation after December 2020				
	Committed Funds	Expected Energy Savings (Net)		
2020 [6][7]	\$	GWH	MW	MMth
Resource	7,410,211	0	0	4.01
Non-Resource	1,290,834	0	0	0
Codes & Standards	-	0	0	0
SoCalGas Total	8,701,045	0.00	0.00	4.01

[1] SoCalGas recognizes 2017 to be a bridge period of the 2013-2017 funding cycle based on D.15-10-028. D.15-10-028 defers the accounting issues associated with the Rolling Portfolio to future disposition, and instead, refers to 2017 as a status quo year for accounting items.

[2] Committed and encumbered funds are associated with the 2010-2012 program cycle as of 12/31/2020.

[3] Committed and encumbered funds are associated with the 2013-2017 program cycle as of 12/31/2020.

[4] Committed and encumbered funds are associated with the 2018 program cycle as of 12/31/2020.

[5] Committed and encumbered funds are associated with the 2019 program cycle as of 12/31/2020.

[6] Committed and encumbered funds are associated with the 2020 program cycle as of 12/31/2020.

[7] Non-Resource category includes Evaluation, Measurement & Verification.

SECTION 8 SHAREHOLDER PERFORMANCE INCENTIVES

The CPUC issued a moratorium, effective November 5th, 2020, on award payments under the efficiency savings and performance incentive (ESPI) mechanism beginning with the 2021 program year advice letter earnings claims. This moratorium remains in effect pending subsequent action from the CPUC to assess whether, how, or when a new version of the ESPI can be implemented.

The CPUC approved Resolutions E-5062 and E-5108 addressing the ESPI awards of Pacific Gas & Electric (PG&E), Southern California Edison (SCE), and San Diego Gas & Electric (SDG&E) for program years (PY) 2017 & 2018 and PY 2018 & 2019, respectively. While SoCalGas submitted compliance advice letters AL 5509 and AL 5685 for its respective ESPI awards, the Resolutions declined to address SoCalGas' request at that time.

Table 8

A	B	C	D
Table 8			
<i>Shareholder Incentives (ESPI)</i>			
Program Year	2018	2019	2020
Forecast [1][2]	\$4,310,258	\$3,000,000	\$2,500,000
Actual [1][2]			

[1] SoCalGas' compliance Advice Letter 5183-A included the forecasted ESPI award of \$4,310,258 for PY 2018. SoCalGas awaits resolution of compliance Advice Letter 5509 which includes the initial PY 2018 ESPI payment request of \$2,481,501.

[2] SoCalGas' compliance Advice Letter 5349-A included the forecasted ESPI award of \$3,000,000 for PY 2019. SoCalGas' compliance Advice Letter 5510 included the forecasted ESPI award of \$2,500,000 for PY 2020.

SECTION 9 BUSINESS PLAN METRICS, CAP & TARGET, AND 3RD PARTY CALCULATION TABLES

As part of program administrator's 2020 annual reports, the business plan metrics, cap & target performance, and 3rd party calculation information have been added as individual tables within the report. Table 9 provides the results of the business plan metrics for program year 2020. Table 10 provides performance information against 2020 portfolio caps and targets. Table 11 provides SoCalGas' third-party programs budget and contract information.

Table 10

Energy Efficiency Cap And Target Expenditure Report							
Line	Budget Category	Expenditures			Cap & Target Performance		
		Non-Third-Party Qualifying Costs (including PA costs and old-definition 3P/GP contracts that don't meet the new definition)	Third-Party Qualifying Costs 2 (including SW)	Total Portfolio	Percent of Budget	Cap %	Target %
1	Administrative Costs	\$ 4,383,440	\$ 1,852,472	\$ 6,235,912			
2	IOU	\$ 3,633,837	\$ 114,365	\$ 3,748,202	3.5%	10.0%	
3	Third-Party & Partnership	\$ -	\$ 877,557	\$ 877,557	4.9%		10.0%
4	Target Exempt Programs	\$ 749,602	\$ 860,550	\$ 1,610,152			
5	Marketing and Outreach Costs	\$ 5,211,641	\$ 437,336	\$ 5,648,977			
6	Marketing & Outreach	\$ 3,163,242	\$ 437,336	\$ 3,600,579	3.3%		6.0%
7	Statewide Marketing & Outreach	\$ 2,048,399	\$ -	\$ 2,048,399			
8	Direct Implementation Costs	\$ 49,348,313	\$ 31,231,453	\$ 80,579,766			
9	Direct Implementation (Incentives and Rebates)	\$ 28,050,570	\$ 8,678,792	\$ 36,729,362			
10	Direct Implementation (Non Incentives and Non Rebates)	\$ 15,672,184	\$ 13,857,660	\$ 29,529,844	27.3%		20.0%
11	Direct Implementation Target Exempt Programs	\$ 5,625,559	\$ 8,695,001	\$ 14,320,560			
12	EM&V Costs (Investor Owned Utilities & Energy Division)			\$ 371,867	0.3%	4.0%	
13	Total	\$ 58,943,394	\$ 33,521,261	\$ 92,836,523			
14	2020 Authorized Budget			\$ 108,053,981			
15	Third-Party Implementer Contracts (as defined per D.16-08-			\$ 17,728,812			

Notes

- D.09-09-047, OP 13 defines the derivation of the caps and targets as a percentage of budget.
- Includes energy efficiency costs authorized in AL 5510; does not include costs recovered in SCG's General Rate Case.
- Does not include costs incurred by SoCalREN.
- The 2020 Authorized Budget was approved through AL 5510 on September 13, 2019. SoCalGas SW ME&O budget is authorized separately through D.19-01-005.
- The Third-Party and Partnership administrative cost target is calculated as a percentage of total Third Party and Partnership Non-IOU budgets (\$17,728,812).
- Administrative Cap Exempt programs include: Codes & Standards, Emerging Technologies, Workforce Education & Training, Integrated Demand-Side Management, CALSPREE Energy Advisor, Commercial Energy Advisor, Commercial Continuous Energy Improvement, Industrial Energy Advisor, Industrial Continuous Energy Improvement, Agriculture Energy Advisor, Agriculture Continuous Energy Improvement, Financing, and all non-resource Local, Government Partnership, and Third-Party programs.
- Statewide Marketing & Outreach expenditures are excluded from the Marketing and Outreach Cost target calculation.
- Direct Implementation (Incentives and Rebates) include: End User Rebates, Direct Install labor activity, Direct Install Materials & Services, and Upstream/Midstream rebates.
- Direct Implementation Target Exempt programs include: Codes & Standards, Emerging Technologies, Workforce Education & Training, Integrated Demand-Side Management, CALSPREE Energy Advisor, Commercial Energy Advisor, Commercial Continuous Energy Improvement, Industrial Energy Advisor, Industrial Continuous Energy Improvement, Agriculture Energy Advisor, Agriculture Continuous Energy Improvement, Financing, and all non-resource Local, Government Partnership, and Third-Party programs.

Southern California Gas Company 2020 Energy Efficiency Programs Annual Report – May 2021

Table 11

I. Local Program Third-Party Budgets

Name of Program	Counterparty Name	3P Procurement (Y/N)*	Date Contract Signed	Date Contract Expires	Length (months)	Market Segment	Sub-Segment	Market Size** (excludes only S,M,L)	Types of Customers Addressed	Total Contract Amount (\$)	Projected Annualized Budgets or Approved Annual Budgets					Total	Check Total
											2021	2022	2023	2024	2025		
IND-Small Industrial Facility Upgrade	CLEAResult Consulting, Inc.	N	3/1/2010	3/31/2022	156	Industrial	Industrial	S,M,L	Industrial								FALSE
W&ET-HERS Rater Training Advancement	CLEAResult East Operating, LLC	N	6/13/2010	3/31/2022	153	Cross-Cutting	Cross-Cutting	N/A	Cross-Cutting								FALSE
RES-LapWise	AM Conservation Corp, Inc.	N	3/1/2010	3/31/2022	56	Residential	Residential	N/A	Residential								FALSE
RES-AD70-BEMFS Program	RCF Resources, LLC	N	12/20/2010	3/31/2022	40	Residential	Single Family	N/A	Single Family								FALSE
RES-Behavioral Program	Onack America, Inc.	N	8/31/2010	10/31/2021	38	Residential	Residential	N/A	Residential								FALSE
RES-Behavioral Program	Adler, Technologies, LLC	N	1/15/2011	12/31/2021	56	Residential	Residential	N/A	Residential								FALSE
RES-Behavioral Program	Reddy, Inc.	N	10/19/2010	11/30/2021	25	Residential	Residential	N/A	Residential								FALSE
RES-Behavioral Program	Javelin Marketing Group	N	7/20/2017	12/31/2021	54	Residential	Residential	N/A	Residential								FALSE
RES-Multi-Phase	Harvey Corporation	N	12/31/2017	12/31/2021	48	Residential	Residential	N/A	Residential								FALSE
RES-Pasadena Home Upgrade	City of Pasadena	N	5/31/2017	12/31/2021	55	Residential	Single Family	N/A	Single Family								FALSE
RES-Burbank Home Upgrade	Burbank Water and Power	N	1/1/2014	12/31/2021	96	Residential	Single Family	N/A	Single Family								FALSE
COM-LADWP Direct Install	Los Angeles Department of Water and Power	N	1/2/2011	12/31/2021	108	Commercial	Small/Medium Businesses	S,M	Small/Medium Businesses								FALSE
COM-Pasadena Direct Install	City of Pasadena	N	9/10/2010	12/31/2021	48	Commercial	Small/Medium Businesses	S,M	Small/Medium Businesses								FALSE
RES-LADWP HVAC	Los Angeles Department of Water and Power	N	8/28/2017	12/31/2021	52	Residential	Residential	N/A	Residential								FALSE
COM-Inman Rehabs' Foodservice POS	Energy Solutions	N	1/1/2014	6/30/2021	91	Commercial	Commercial	S,M,L	Commercial								FALSE
COM-Midstream Water Heating	CLEAResult Consulting, Inc.	N	11/16/2010	9/30/2021	24	Commercial	Commercial	S,M,L	Commercial								FALSE
COM-Direct Install Program	Sonerey Companies	N	3/16/2017	3/31/2021	48	Commercial	Small/Medium Businesses	S,M	Small/Medium Businesses								FALSE
PUB-Direct Install Program	Sonerey Companies	N	3/16/2017	3/31/2021	48	Public	Small/Medium Public	S,M	Small/Medium Public								FALSE
RES-Residential Advanced Clean Energy	Sonerey Companies	N	9/21/2020	12/31/2023	36	Residential	Single Family	N/A	Single Family								TRUE
RES-Community Language Efficiency Outreach-Direct Install	Global Energy Services, Inc.	Y	9/21/2020	7/31/2023	36	Residential	Single Family	N/A	Single Family								FALSE
RES-Multi-family Energy Alliance	RCF Resources, LLC	Y	9/25/2020	12/31/2023	36	Residential	Multi-Family	N/A	Multi-Family								TRUE
RES-Multi-family Smart and Water Heating Controls Program	Energy Controls, Inc.	Y	12/23/2020	12/31/2023	36	Residential	Multi-Family	N/A	Multi-Family								TRUE
COM-Commercial Building Energy Solutions and Technologies	RCF Resources, LLC	Y	8/31/2020	12/31/2023	36	Commercial	Small/Medium Businesses	S,M	Small/Medium Businesses								TRUE
COM-Small and Medium Commercial EE Program	Franklin Energy Services, LLC	Y	9/24/2020	9/24/2023	36	Commercial	Small/Medium Businesses	S,M	Small/Medium Businesses								FALSE
PUB Public Direct Install Program	Sonerey Companies	Y	8/28/2020	12/31/2023	36	Public	Small/Medium Public	S,M	Government & K-12 Facilities								TRUE
RES-Comprehensive Manufactured Home Program	Sonerey Companies	Y	12/22/2020	12/31/2023	36	Residential	Manufactured Homes	N/A	Manufactured Homes								TRUE
RES-Residential Manufactured Homes Program	Staples & Associates/Staples Energy	Y	12/21/2020	12/31/2023	36	Residential	Manufactured Homes	N/A	Manufactured Homes								TRUE
COM-Large Commercial Program	Whelan Energy Solutions	Y	12/16/2020	12/31/2024	48	Commercial	Large Commercial	L	Large Commercial								TRUE
COM-Service RC- Large Commercial Program	Enovos, Inc.	Y	12/23/2020	12/31/2024	48	Commercial	Large Commercial	L	Large Commercial								TRUE
AG-Agriculture Energy Efficiency Program	RCF Resources, LLC	Y	12/14/2020	12/31/2023	36	Agricultural	Agricultural	S,M,L	Agricultural								TRUE
Total										\$ 46,201,515	\$ 21,021,774	\$ 20,019,614	\$ 3,749,993	\$ -	\$ 80,992,892		

* (Y) if the program was procured through the two-stage third-party solicitation process, (N) if program existed prior to the establishment of the process

**Market size: S-M-customers that use less than 50,000 therms annually, L-customers that use more than 50,000 therms annually

2. Statewide Programs Third-Party Budgets

Name of Program	Counterparty Name	Lead ID#	Date Contract Signed	Date Contract Expires	Length (months)	Market Segment	Sub-Segment	Market Size	Types of Customers Addressed	Total Contract Amount (\$)	Projected Annualized Budgets or Approved Annual Budgets					ROI Share of Projected Annualized Budgets	Total						
											2021	2022	2023	2024	2025								
Statewide Upstream and Midstream HVAC Program	CLEAResult Consulting, Inc.	SDGAR	10/14/2020	12/31/2023	39	Commercial & Residential	Commercial & Residential	S,M,L	Commercial & Residential	\$ 8,974,313	\$ 10,195,516	\$ 11,097,047	\$ 11,681,749	\$ -	\$ -	8.50%	\$ 852,142	\$ 1,094,913	\$ 1,143,794	\$ -	\$ -	\$ -	\$ 3,091,652
California Foodservice Instant Reheat Program	Energy Solutions	SoCalGas	1/28/2020	6/30/2024	42	Commercial	Commercial	S,M,L	Commercial							25.08%							
Statewide Midstream Water Heating Program	DNV GI Energy Services USA, Inc.	SoCalGas	1/24/2020	6/30/2024	42	Commercial	Commercial	S,M,L	Commercial							25.08%							
Non-Residential AB Electric - California New Construction	Whelan Energy Solutions	PG&E	11/30/2020	12/31/2025	55	Cross-Cutting	Cross-Cutting	S,M,L	Cross-Cutting	\$ 80,714,296	\$ 6,701,301	\$ 6,701,301	\$ 6,701,301	\$ 6,701,301	\$ 6,701,301	0.00%	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Non-Residential Mixed Fuel - California New Construction	Whelan Energy Solutions	PG&E	11/30/2020	12/31/2025	55	Cross-Cutting	Cross-Cutting	S,M,L	Cross-Cutting	\$ 8,069,734	\$ 1,060,237	\$ 1,060,237	\$ 1,060,237	\$ 1,060,237	\$ 1,060,237	8.50%	\$ 924,718	\$ 924,718	\$ 924,718	\$ 924,718	\$ 924,718	\$ 924,718	\$ 4,623,589
SW C&S Building Codes Advocacy	Booverton Economics Inc1	PG&E	8/20/2019	12/31/2020	17	Cross-Cutting	Cross-Cutting	S,M,L	Cross-Cutting							8.50%							
SW C&S Building Codes Advocacy	UC Regents1	PG&E	10/18/2019	12/18/2020	14	Cross-Cutting	Cross-Cutting	S,M,L	Cross-Cutting							8.50%							
SW C&S Building Codes Advocacy	Colten Ventures Inc1	PG&E	6/2/2020	12/31/2020	7	Cross-Cutting	Cross-Cutting	S,M,L	Cross-Cutting							8.50%							
SW C&S Building Codes Advocacy	Frontier Energy Inc2	PG&E	5/7/2020	12/31/2021	20	Cross-Cutting	Cross-Cutting	S,M,L	Cross-Cutting							8.50%							
SW C&S Building Codes Advocacy	McHugh Energy Consultants Inc2	PG&E	12/4/2019	1/31/2021	14	Cross-Cutting	Cross-Cutting	S,M,L	Cross-Cutting							8.50%							
SW C&S Building Codes Advocacy	Colten Ventures Inc	PG&E	7/11/2020	3/31/2022	25	Cross-Cutting	Cross-Cutting	S,M,L	Cross-Cutting							8.50%							
SW C&S Building Codes Advocacy	Colten Ventures Inc	PG&E	6/18/2020	12/31/2021	19	Cross-Cutting	Cross-Cutting	S,M,L	Cross-Cutting							8.50%							
SW C&S Building Codes Advocacy	TBC Solutions Inc	PG&E	6/18/2020	12/18/2021	18	Cross-Cutting	Cross-Cutting	S,M,L	Cross-Cutting							8.50%							
SW C&S Building Codes Advocacy	UC Regents	PG&E	8/14/2019	1/15/2021	18	Cross-Cutting	Cross-Cutting	S,M,L	Cross-Cutting							8.50%							
SW C&S Appliance Standards Advocacy	Colten Ventures Inc	PG&E	2/28/2020	12/31/2022	35	Cross-Cutting	Cross-Cutting	S,M,L	Cross-Cutting							8.50%							
SW C&S Appliance Standards Advocacy	Colten Ventures Inc	PG&E	3/12/2020	12/31/2022	34	Cross-Cutting	Cross-Cutting	S,M,L	Cross-Cutting							8.50%							
SW C&S Appliance Standards Advocacy	2590 Partners	PG&E	2/11/2020	12/31/2022	35	Cross-Cutting	Cross-Cutting	S,M,L	Cross-Cutting							8.50%							
SW C&S National Advocacy	Colten Ventures Inc	PG&E	1/29/2020	12/31/2022	34	Cross-Cutting	Cross-Cutting	S,M,L	Cross-Cutting							8.50%							
SW C&S National Advocacy	Colten Ventures Inc	PG&E	3/12/2020	12/31/2022	34	Cross-Cutting	Cross-Cutting	S,M,L	Cross-Cutting							8.50%							
SW C&S National Advocacy	2590 Partners	PG&E	2/11/2020	12/31/2022	35	Cross-Cutting	Cross-Cutting	S,M,L	Cross-Cutting							8.50%							
SW C&S Building Codes Advocacy	TBC Solutions Inc	PG&E	9/10/2020	12/31/2022	19	Cross-Cutting	Cross-Cutting	S,M,L	Cross-Cutting							8.50%							
SW C&S Building Codes Advocacy	Colten Ventures Inc	PG&E	9/2/2020	12/31/2021	16	Cross-Cutting	Cross-Cutting	S,M,L	Cross-Cutting							8.50%							
SW C&S Building Codes Advocacy	Colten Ventures Inc	PG&E	9/2/2020	12/31/2021	16	Cross-Cutting	Cross-Cutting	S,M,L	Cross-Cutting							8.50%							
SW C&S Building Codes Advocacy	Colten Ventures Inc	PG&E	10/26/2020	12/28/2021	14	Cross-Cutting	Cross-Cutting	S,M,L	Cross-Cutting							8.50%							
SW C&S Building Codes Advocacy	Frontier Energy Inc	PG&E	12/7/2020	12/31/2021	13	Cross-Cutting	Cross-Cutting	S,M,L	Cross-Cutting							8.50%							
CA Statewide Lighting Program	TBC Solutions, Inc	SCE	9/1/2020	12/31/2021	35	Commercial	Commercial	N/A	Commercial							0.00%							
Total										\$ 9,632,046	\$ 10,367,027	\$ 11,645,134	\$ 924,718	\$ 924,718	\$ 33,494,643								

Footnote (1): SoCalGas included these SW 3P-qualified contracts as part of its compliance calculation towards the 25% milestone because they were under contract at the time of the Sept 30, 2020 compliance deadline. Applicable budgets are included in 2021 budget column O, however they were 2020 budgets and contracts expired at end of 2020

Footnote (2): SoCalGas included these SW 3P-qualified contracts as part of its compliance calculation towards the 25% milestone because they were under contract at the time of the Sept 30, 2020 compliance deadline. Applicable budgets are included in 2021 budget column O, however they were 2020 budgets and the contracts were replaced or discontinued at the end of 2020

3. AB 841

PY 2020 ABAL Budget*	\$	104,064,000		
Authorized 2020 Budget Cap	\$	104,064,000		
Difference	\$	-		
		2021	2022	2023
Applicable %		80%	70%	60%
Funding from applicable %	\$	-	\$ -	\$ -
Funding from carryover	\$	1,439,360		
Total AB 841 Funding	\$	1,439,360	\$ -	\$ -

* see "TOU Budget Recovery Request"

4. Annual Budget

Sector/Category	PY 2021 Budget
Residential	\$ 40,990,139
Commercial	\$ 25,398,536
Industrial	\$ 12,608,990
Agriculture	\$ 5,180,293
Emerging Tech	\$ 1,528,000
Public	\$ 9,269,126
WE&T	\$ 4,008,380
AB 841 Allocations*	\$ 5,000,000
Finance	\$ 650,000
EM&V	\$ 4,421,001
Codes and Standards	\$ 2,140,257
Total	\$ 111,194,721

*Allocations budgeted to the SRVEVR and SNPFA programs per AB 841. This number should equal the Total AB 841 funding found in section 3 of this worksheet

5. 40% & 60% Compliance

Component	2021	2022	2023	2024	2025
Local 3P Programs	\$ 36,201,515	\$ 21,021,774	\$ 20,019,614	\$ 3,749,993	\$ -
Statewide 3P Programs	\$ 9,551,737	\$ 10,367,927	\$ 11,645,134	\$ 924,718	\$ 924,718
AB 841	\$ 5,000,000	\$ -	\$ -		
Total 3P-Qualified Budget	\$ 50,753,252	\$ 31,389,701	\$ 31,664,748	\$ 4,674,710	\$ 924,718
Annual Budget	\$ 111,194,721				
% Third Party Achieved	46%				
Requirement	40%				
In Compliance (T/F)	TRUE				

6. 25% Compliance

Compliance Deadline*	9/30/2020
Local 3P Programs (by deadline)	\$ 26,580,597
Statewide 3P Programs (by deadline)	\$ 1,612,597
Total 3P-Qualified Budget	\$ 28,193,194
Annual Budget	\$ 106,194,721
% Third Party Achieved	27%
Requirement	25%
In Compliance (T/F)	TRUE

*For SDG&E and PG&E, deadline is 6/30/2020. For SCE & SoCalGas, deadline is 9/30/2020

Appendix A – SoCalGas Program Numbers

Program ID	Program Name	Date Added (new programs)	Date Removed
SCG3701	RES-Energy Advisor		
SCG3702	RES-Residential Energy Efficiency Program		
SCG3703	RES-SW-Plug Load and Appliances - POS		
SCG3705	RES-Home Upgrade Program		
SCG3706	RES-Residential HVAC		
SCG3707	RES-RNC		
SCG3708	COM-Energy Advisor		
SCG3710	COM-Calculated Incentives		
SCG3711	COM-Deemed Incentives		
SCG3713	IND-Energy Advisor		
SCG3714	IND-SEM		
SCG3715	IND-Calculated Incentives		
SCG3716	IND-Deemed Incentives		
SCG3717	AG-Energy Advisor		
SCG3719	AG-Calculated Incentives		
SCG3720	AG-Deemed Incentives		
SCG3721	ET-Technology Development Support		
SCG3722	ET-Technology Assessment Support		
SCG3723	ET-Technology Introduction Support		
SCG3724	C&S-Building Codes & Compliance Advocacy		
SCG3725	C&S-Appliance Standards Advocacy		
SCG3726	C&S-Compliance; Enhancement		
SCG3727	C&S-Reach; Codes		
SCG3728	C&S-Planning; Coordination		
SCG3729	WE&T-Integrated; Energy Efficiency Training		
SCG3730	WE&T-Connections		
SCG3733	SW-ME&O-ME&O		
SCG3735	FIN-On-Bill Financing		
SCG3737	FIN-New Financing Offerings		
SCG3738	PUB-CA Department of Corrections Partnership		
SCG3739	PUB-California Community College Partnership		
SCG3740	PUB-UC/CSU/IOU Partnership		
SCG3741	PUB-State of CA/IOU Partnership		
SCG3742	PUB-LA Co Partnership		
SCG3744	PUB-Riverside Co Partnership		December 2020

Program ID	Program Name	Date Added (new programs)	Date Removed
SCG3745	PUB-San Bernardino Co Partnership		December 2020
SCG3746	PUB-Santa Barbara Co Partnership		
SCG3747	PUB-South Bay Cities Partnership		
SCG3748	PUB-San Luis Obispo Co Partnership		
SCG3749	PUB-San Joaquin Valley Partnership		
SCG3751	PUB-SEEC Partnership		
SCG3750	PUB-Orange County Cities Partnership		
SCG3754	PUB-Ventura County Partnership		
SCG3755	PUB-Public Sector EE Innovation		
SCG3757	IND-Small Industrial Facility Upgrades		
SCG3760	WE&T-HERS; Rater Training Advancement		
SCG3762	RES-CLEO		July 2020
SCG3763	RES-MF Direct Therm Savings		
SCG3764	RES-LivingWise		
SCG3765	RES-Manufactured Mobile Home		
SCG3771	SOL-IDEEA365		
SCG3772	EM&V-Evaluation; Measurement & Verification		
SCG3773	PUB-Public Sector Resource		
SCG3774	PUB-LG Regional Resource		
SCG3776	PUB-Gateway Cities Partnership		
SCG3777	PUB-San Gabriel Valley COG Partnership		
SCG3779	PUB-West Side Community Energy Partnership		
SCG3783	PUB-Western Riverside Energy Partnership		
SCG3793	COM-Instant Rebates! Foodservice POS		
SCG3801	PUB-North Orange County Cities Partnership		December 2020
SCG3802	PUB-San Bernardino Regional Energy Partnership		
SCG3803	FIN-California Hub for EE Financing		
SCG3805	COM-Direct Install Program		
SCG3809	COM-AB793-CEMTL Program		
SCG3810	RES-AB793-REMTS Program		
SCG3813	COM-Savings By Design		
SCG3815	PUB-Calculated Incentives		
SCG3816	PUB-Deemed Incentives		
SCG3817	PUB-Direct Install Program		
SCG3818	PUB-SW-Water/Wastewater Pumping Program		
SCG3819	WE&T-SW-Career & Workforce Readiness		
SCG3820	RES-Direct Install Program		
SCG3821	IND-Direct Install Program		

Program ID	Program Name	Date Added (new programs)	Date Removed
SCG3823	RES-HVAC QI/QM		
SCG3824	RES-Behavioral Program		
SCG3825	COM-HVAC QI/QM		
SCG3829	RES-Marketplace		
SCG3830	RES-Retail Partnering		
SCG3831	RES-EE Kits		
SCG3832	RES-Pasadena Home Upgrade		
SCG3833	RES-Burbank Home Upgrade		
SCG3834	COM-LADWP Direct Install		
SCG3835	COM-Pasadena Direct Install		
SCG3836	RES-LADWP HVAC		
SCG3837	PUB-SW-Energy Atlas		
SCG3861	RES-Community Language Efficiency Outreach-Direct Install	August 2020	
SCG3882	COM-Small and Medium Business Program	December 2020	

Appendix B.1 – Updated Monthly Report

The Updated Monthly Report can be found on the CEDARS website:
<https://cedars.sound-data.com/monthly-reports/statewide-dashboard>

Appendix B.2 – Updated Quarterly Report

The Updated Quarterly Report can be found on the CPUC’s energy efficiency reports website:
<https://www.cpuc.ca.gov/general.aspx?id=6442468251>

Appendix C – Third-Party Solicitations Information

See Section 9 (Table 11) above for information regarding SoCalGas' third-party programs budget and contract information.

Compliance with D.18-05-041

- Program administrators must also assess the relative success of implementers' strategies, for purposes of identifying lessons learned and best practices for maximizing the contribution of energy efficiency in disadvantaged communities. These assessments shall be included in the program administrators' annual reports. (OP 11, p. 184).
 - *SoCalGas is currently undergoing solicitations where most of its new third-party programs will be launching in 2021. Information regarding lessons learned and best practices in disadvantaged communities will be forthcoming in SoCalGas' 2021 Annual Report.*

- Investor owned utilities must track the number and proportion of third parties that forego the option of using utility account representatives. The utilities must include this information in their annual reports. (OP 17, p. 185)
 - *All third-party programs that target customers with SoCalGas account representatives are provided with basic support that includes providing general information of relevant energy efficiency programs, referring program-related inquiries to respective implementers, and coordinate with implementers to address basic customer questions and concerns. Thus far, one implementer has chosen to utilize SoCalGas account representatives that goes beyond the basic support described.*

Appendix D – Metrics

Appendix D – Metrics; see Section 9 (Table 9) above. In addition, SoCalGas’ 2020 metrics have been included as part of the documents submitted for the annual report, available at <https://www.cpuc.ca.gov/general.aspx?id=6442468251>.