

SOUTHERN CALIFORNIA GAS COMPANY
ENERGY SAVINGS ASSISTANCE AND CALIFORNIA ALTERNATE RATES FOR
ENERGY PROGRAMS & BUDGETS FOR PROGRAM YEARS 2021-2026

(A.19-11-006)

(DATA REQUEST TURN-SOCALGAS-3)

DATE RECEIVED: JUNE 22, 2020

DATE SUBMITTED: (PARTIAL) JULY 6, 2020 (EXCEPT Q7, 12, 13, and 16)

DATE SUBMITTED (PARTIAL): JULY 14, 2020 (Q7, 12, 13 and 16)

QUESTION 1: (Mark Aguirre and Erin Brooks)

Please refer to the Utility Annual Reports.

- a. Explain the methodology used to calculate the historical penetration rates shown in ESA Table 4.
- b. Explain the methodology used to calculate the historical percentage of eligible households served shown in ESA Table 2.
- c. Explain the difference between what these two metrics represent.

RESPONSE 1:

- a. The historical penetration rate is calculated by dividing the Homes Treated for the year by the estimated eligible for that year.

$$\frac{\text{Homes treated by year}}{\text{Estimated eligible by year}} = \text{Penetration rate by year}$$

- b. See response to Q1a.
- c. The two metrics requested in Q1a and Q1b are the same.

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QUESTION 2: (Mark Aguirre and Erin Brooks)

What time period does SoCalGas's program year span (as reflected in SoCalGas's ESA Annual Reports and program proposals in this application)? What time period does SoCalGas's fiscal year span (as reflected in Appendix A to SoCalGas's application)?

RESPONSE 2:

The SoCalGas program year spans from January 1 through December 31 (as reflected in SoCalGas's Low Income Annual Reports and program proposal in the 2021-2026 application). SoCalGas's fiscal year also spans from January 1 through December 31 (as reflected in Appendix A of the 2021-2026 application).

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QUESTION 3: (Octavio Verduzco)

Please provide the annual revenues from sales by rate class for program years 2017 to 2019 (actual) and 2020 to 2026 (projected), with a break-out within the residential class for CARE customers. If revenue is available by housing type (single family, multi-family, and mobile homes), please provide this break out.

RESPONSE 3:

The table below shows the actual annual revenues from sales by rate class for program years 2017 to 2019. SoCalGas does not forecast CARE Program revenues for 2020 to 2026.

Note that all rate classes are mutually exclusive. Housing type by rate class is not the same as housing type in low-income programs. Mobile Home housing, if individually metered, is included in Single Family otherwise it is included in Sub-metered.

Revenue (Total, \$)	2017	2018	2019
Residential (total)	\$431,481,736	\$428,767,018	\$444,250,459
Single-family	\$304,600,265	\$301,876,244	\$327,042,436
Multi-family (GR rates)	\$121,975,065	\$122,684,063	\$111,441,359
Central Facility (GM rates)	\$34,903	\$25,926	\$12,064
Master Meter	\$14,285	\$14,393	\$15,649
Sub-metered	\$ 4,857,217	\$4,166,391	\$5,738,951

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QUESTION 4: (Octavio Verduzco)

Please provide the annual sales (therms) by rate class for program years 2017 to 2019 (actual) and 2020 to 2026 (projected), with a break-out within the residential class for CARE customers. If sales are available by housing type (single family, multi-family, and mobile homes), please provide this break out.

RESPONSE 4:

The table below shows actual annual therm usage from sales by rate class for program years 2017 to 2019.

Note that all rate classes are mutually exclusive. Housing type by rate class is not the same as housing type in low-income programs. Mobile Home housing, if individually metered, is included in Single Family, otherwise in Sub-metered.

Revenue (total, therm)	2017	2018	2019
Residential (total)	479,929,093	483,934,329	537,242,516
Single-family	341,994,543	344,530,675	386,668,384
Multi-family (GR rates)	126,019,912	128,186,060	139,023,076
Central Facility (GM rates)	48,959	36,671	14,736
Master Meter	20,099	23,311	25,855
Sub-metered	11,845,580	11,157,612	11,510,465

The table below shows projected therm usage for 2020 to 2026. SoCalGas does not project by housing type nor break-out for residential class.

Program Year	Residential CARE	Non-Residential CARE	CARE Forecast (in therms)
2020	599,742,839	3,538,483	603,281,321
2021	604,798,794	3,568,313	608,367,107
2022	610,015,062	3,599,089	613,614,151
2023	615,339,543	3,630,503	618,970,046
2024	620,716,835	3,662,229	624,379,064
2025	626,103,753	3,694,012	629,797,765

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2026	631,481,010	3,725,738	635,206,748
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QUESTION 5: (Mark Aguirre and Erin Brooks)

With respect to non-resource measures, please answer the following questions.

- a. How is non-resource defined? When responding to this question, please be specific about any criteria, thresholds, and limits that are used to determine if a measure is categorized as non-resource.
- b. Please provide average spending per home for non-resource measures in each of the previous 10 program years.
- c. Please provide planned average spending per home for non-resource measures for each year from PY2020-2026.
- d. Please provide a list of all measures currently offered or proposed for PY2021-2026 that meet the criteria for non-resource measures. Indicate which measures, if any, would be new in PY2021-2026.

RESPONSE 5:

- a. Non-resource measures are defined based on energy savings value:

From recommendations in the “Addendum to ESAP Cost-Effectiveness Working Group (CEWG)¹ White Paper, dated February 15, 2013: Non-resource measures are those that provide little to no energy savings, but significant non-energy benefits. This definition was used in the 2015-2017 application and in the 2016 Low Income Annual Report.

From recommendations by the CEWG² submitted on June 13, 2018: Non-resource measures are those having less than 1 kWh or 1 therm of annual energy savings. This definition was used in the 2021-2026 application and in the 2019 Low Income Annual Report.

¹ CEWG was authorized in D. 12-08-044 to provide proposals and recommendations.

² CEWG was authorized in D. 16-11-022 to provide proposals and recommendations.

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- b. The table below provides SoCalGas' average spending per home for "non-resource" measures for 2016-2019, using the definition of "resource" adopted from the CEWG recommendations submitted on June 13, 2018. SoCalGas notes that prior to resource TRC cost effectiveness metrics being presented as part of the 2015-2017 application, a distinction between "resource" and "non-resource" measures had not yet been established.

Measure Installations Costs Per Home	
Program Year	Non- Resource
2016	\$ 290
2017	\$ 296
2018	\$ 360
2019	\$ 324

- c. The table below provides SoCalGas's planned average spending per home for non-resource measures from 2020-2026.

Measure Installation Costs Per Home	
Program Year	Non-Resource
2020	\$ 296
2021	\$ 344
2022	\$ 266
2023	\$ 270
2024	\$ 275
2025	\$ 280
2026	\$ 285

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d. The following is a list of all non-resource measures:

Air Sealing / Envelope

Furnace Repair/Replacement - Furnace repair/replacement will become furnace repair in PY 2021-2026. The replacement portion of the measure will be part of the HE FAU and HE wall furnace measures which are resource measures. See question 6d.

Furnace Clean and Tune

Carbon Monoxide & Smoke Alarms - new measure

Comprehensive Home Health and Safety Check-up - new measure

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QUESTION 6: (Mark Aguirre and Erin Brooks)

With respect to resource measures, please answer the following questions.

- a. How is resource defined? When responding to this question, please be specific about any criteria, thresholds, and limits that are used to determine if a measure is categorized as resource.
- b. Please provide average spending per home for resource measures in each of the previous 10 program years.
- c. Please provide planned average spending per home for resource measures for each year from PY2020-2026.
- d. Please provide a list of all measures currently offered or proposed for PY2021-2026 that meet the criteria for resource measures. Indicate which measures, if any, would be new in PY2021-2026.

RESPONSE 6:

- a. Resource measures are defined based on energy savings value:

From recommendations in the “Addendum to ESAP CEWG White Paper, dated February 15, 2013: Resource measures are those that are intended to provide energy savings and bill savings to participants. This definition was used in the 2015-2017 application and in 2016 annual report.

From recommendations by the CEWG, submitted by email to service list A.14-11-007 on June 13, 2018: Resource measures are those having 1 kWh or 1 therm or more of annual energy savings. This definition was used in the 2021-2026 application and in 2019 annual report.

- b. The table below provides SoCalGas’ average spending per home for “resource” measures for 2016-2019, using the definition of “resource” adopted from the CEWG recommendations submitted on June 13, 2018. SoCalGas notes that prior to resource TRC cost effectiveness metrics being presented as part of the 2015-2017

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application, a distinction between “resource” and “non-resource” measures had not yet been established.

Program Year	Resource Measure Installation Costs Per Home
2016	\$282
2017	\$269
2018	\$271
2019	\$242

- c. The table below provides SoCalGas’s planned average spending per home for resource measures from 2020-2026.

Measure Installation Costs Per Home	
Program Year	Resource
2020	\$ 510
2021	\$ 728
2022	\$ 802
2023	\$ 795
2024	\$ 788
2025	\$ 780
2026	\$ 771

- d. Shown below is the list of resource measures proposed for PY2021-2026, using the definition last recommended by the CEWG in June of 2018:

Attic Insulation
 High Efficient (HE) Wall Furnace Early Replace – New measure.
 HE Wall Furnace on Burnout – New measure.
 High Efficient Forced Air Unit (HEFAU) Early Replace – New measure.
 HEFAU On Burnout – New measure.
 High Efficiency Clothes Washers
 Multi-Family (MF) Common Area
 MF Whole Building
 Other Hot Water

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Prescriptive Duct Sealing
Smart Thermostat
Solar Water Heating
Tank and Pipe Insulation
Thermostatic Shower Valve
Tub Diverter/ Tub Spout
Water Heater Repair/Replace

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QUESTION 7: (Mark Aguirre and Erin Brooks)

Please provide average annual consumption (therms) and average bills for ESA participants, pre and post participation, by housing type, for historical years 2017-2019, as well as projected for each year from PY2020-2026, by housing type and by tier (as applicable).

RESPONSE 7:

The tables below show the average annual therm consumption and average bills for ESA participants, pre and post participation, and by housing type for historical years 2017-2019.

The meters are separated into Individually Metered and Master Metered facilities. Individually Metered facilities include single family and multi-family households that are not part of a Master metered facility. Mastered Metered facilities are meters in communities, mobile home parks, condominiums, and apartments.

SoCalGas does not project future therm consumption nor revenue for the ESA Program.

Individually Metered Annual Averages

Housing Type	Pre-Enrollment Therms	Post-Enrollment Therms	Pre-Enrollment Bill \$	Post-Enrollment Bill \$
2017				
Single Family	374	351	\$ 397.21	\$ 347.27
Multifamily	245	235	\$ 269.51	\$ 243.48
Mobile Home	n/a	n/a	n/a	n/a
2018				
Single Family	362	387	\$ 375.30	\$ 383.16
Multifamily	259	268	\$ 256.29	\$ 238.55
Mobile Home	n/a	n/a	n/a	n/a
2019				
Single Family	393	407	\$ 408.46	\$ 449.25
Multifamily	233	243	\$ 225.07	\$ 253.46
Mobile Home	n/a	n/a	n/a	n/a

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Master Metered Annual Averages

Housing Type	Pre-Enrollment Therms	Post-Enrollment Therms	Pre-Enrollment Bill \$	Post-Enrollment Bill \$
2017				
Single Family	8,044	8,746	\$ 13,681.91	\$ 14,216.27
Multifamily	14,896	15,498	\$ 7,041.74	\$ 6,795.84
Mobile Home	62,046	48,166	\$ 24,799.95	\$ 20,818.18
2018				
Single Family -	8,907	9,212	\$ 9,045.73	\$ 7,741.02
Multifamily	11,066	11,664	\$ 7,587.25	\$ 7,415.08
Mobile Home	57,412	65,284	\$ 23,056.13	\$ 26,575.08
2019				
Single Family	6,995	6,889	\$ 6,409.98	\$ 8,136.87
Multifamily	6,864	7,135	\$ 5,600.33	\$ 6,347.17
Mobile Home	59,690	62,734	\$ 26,616.55	\$ 30,967.83

Please note the following:

- Pre and post usages are based on a 12-month rolling average, from the ESA Program enrollment date, which is the ESA Application Signed Date.
- There are enrollments not having a full 12 months of pre and post usages. A simple extrapolation for 12 months was made for all records without 12 months usage to omit the seasonality of usage.
- Pre and post bills are also based on the enrollment date, with 12 bills per year.
- Master Metered facilities may include households that are not ESA participants.

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QUESTION 8: (Mark Aguirre and Erin Brooks)

Please describe any previous and planned efforts by the utility to improve the cost effectiveness of the ESA program.

RESPONSE 8:

In developing the 2021-2026 budget application, SoCalGas reviewed the cost effectiveness contribution of its existing measures, as well as that of potential new measures. In order to improve cost effectiveness, SoCalGas made adjustments to the measure mix. Adjustments included a proposal to reduce conventional wall furnace repairs and eliminate conventional wall furnace kind-for-kind replacements, while introducing HE wall furnaces in early replacement and on-burnout scenarios.

Going forward, SoCalGas' 2021-2026 proposed program will rely increasingly on on-line enrollment and energy education processes, resulting in declining costs in those areas throughout the program cycle, which will contribute to forecast cost effectiveness improvements each year. SoCalGas has also requested flexibility to adjust the measure mix and to introduce new measures during the new program cycle akin to the non-low-income Energy Efficiency Programs.³ If adopted, this flexibility may provide incremental cost effectiveness benefits.

³ See Direct Testimony of Mark Aguirre and Erin Brooks, date November 4, 2019, at pgs. 6, 15, 127 and 166.

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QUESTION 9: (Mark Aguirre and Erin Brooks)

What threshold for cost effectiveness of the ESA program does the utility use? At what level (measure, customer, program) are cost effectiveness thresholds applied? Please provide both the test and the minimum value. If there is no threshold, why not?

RESPONSE 9:

The ESA Program does not use a threshold for cost effectiveness. D.16-11-022 did not adopt a cost effectiveness threshold or direct the CEWG to reconvene on this issue. The CEWG also did not reach consensus on determining a cost effectiveness threshold in the last recommendations, dated June 13, 2018.

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QUESTION 10: (Mark Aguirre and Erin Brooks)

In your most recent Annual Report, ESA Table 11 presents Bill Savings Calculations by Program Year, including a column labeled "Per Home Average Lifecycle Bill Savings". Please provide projected "Per Home Average Lifecycle Bill Savings" for each year from PY2020-2026.

RESPONSE 10:

The table below shows projected per home average lifecycle bill savings from PY 2020 to 2026.

Program Year	Per Home Average Lifecycle Bill Savings
2020	\$ 42.01
2021	\$ 163.86
2022	\$ 178.32
2023	\$ 183.66
2024	\$ 189.17
2025	\$ 194.85
2026	\$ 200.70

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QUESTION 11: (Mark Aguirre and Erin Brooks)

Please provide annual and lifetime savings broken out by housing type (single family, multifamily, and mobile home) achieved for each of the previous 10 program years.

RESPONSE 11:

The table below shows annual therm savings by housing type for 2010-2019. SoCalGas does not have lifetime therm savings by housing type.

Program Year	Single Family Annual Therm Savings	Multi-family Annual Therm savings	Mobile home Annual Therm savings
2010	1,979,000	206,000	142,000
2011	2,679,000	205,000	159,000
2012	885,164	51,862	62,382
2013	2,718,868	246,208	131,424
2014	2,703,400	245,888	195,607
2015	1,316,935	113,608	134,548
2016	963,560	120,053	69,087
2017	1,270,839	173,813	107,958
2018	1,356,038	151,280	104,728
2019	563,789	151,866	24,284

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QUESTION 12: (Mark Aguirre and Erin Brooks)

Please provide projected annual and lifetime savings broken out by housing type (single family, multifamily, and mobile home) for PY2020 and each year of your proposed PY2021-2026 plan.

RESPONSE 12:

The table below shows projected annual therm savings by housing type for PY 2020-2026.

Program Year	Single Family	Multi-Family	Mobile Home	Total Annual Therm Savings
2020	411,655	258,668	22,737	693,060
2021-2026	1,041,284	573,226	54,288	1,668,797

The table below shows projected lifetime therm savings by housing type for PY 2020-2026.

Program Year	Single Family	Multi-Family	Mobile Home	Total Lifetime Therm Savings
2020	2,836,068	4,153,676	54,115	7,043,860
2021-2026	13,918,167	9,936,557	483,331	24,338,055

For PY 2021-2026, annual values remain the same for each projected year, since the annual goal is unchanged year over year. All projected values do not include Multifamily Whole Building measures.

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QUESTION 13: (Mark Aguirre and Erin Brooks)

Please refer to Table A-4 of SoCalGas's PY 2021-2026 Energy Savings Assistance Program Tables. For each gas efficiency measure, please provide the quantity installed, annual therm savings, annual other fuel savings (by type), lifetime therm savings, lifetime other fuel savings (by type), projected expenses, measure life for PY2020 and for each year of the plan period.

RESPONSE 13:

The attached table provides the quantity installed, annual therm savings, estimated useful life (EUL), lifetime therm savings, and projected expenses for 2020 (authorized) and PY 2021-2026 (projected) for each gas efficiency measure. There is no data available for "other fuel savings by type".



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Question 13.xlsx

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QUESTION 14: (Mark Aguirre and Erin Brooks)

When both electric or natural gas equipment are technically feasible alternatives (e.g., a heat pump and a furnace), please indicate how the utility decides which measure to provide to a participant.

RESPONSE 14:

As a single fuel utility, SoCalGas only replaces “kind for kind” equipment. For example, if a gas wall furnace was previously installed in the home, then SoCalGas would replace it with another gas wall furnace for the customer.

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QUESTION 15: (Mark Aguirre and Erin Brooks)

Please confirm whether the total savings reported in Table A-4, Planning Assumptions is inclusive of all housing types, specifically multifamily.

RESPONSE 15:

Yes, the total savings reported in Table a-4, Planning Assumptions is inclusive of all housing types including multifamily.

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(A.19-11-006)

(DATA REQUEST TURN-SOCALGAS-3)

DATE RECEIVED: JUNE 22, 2020

DATE SUBMITTED: (PARTIAL) JULY 6, 2020 (EXCEPT Q7, 12, 13, and 16)

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QUESTION 16: (Mark Aguirre and Erin Brooks)

With respect to the Aliso Canyon Demand Side Management programs, please answer the following questions.

- a. Please provide the year-end reports provided to Energy Division staff for each year of the targeted effort.
- b. Please provide spending, annual therm savings, lifetime therm savings, and participation for the Intensified Deployment of Energy Savings Assistance Program Measures for each year of the targeted effort.
- c. Please compare the measures offered to Aliso Canyon households to historical ESA measure offerings and planned PY 2021-2026 ESA measure offerings.
- d. Did SoCalGas meet or exceed the average per-household savings requirements of Ordering Paragraph 4 of D.16-04-040? Please explain how SoCalGas measured success and provide documentation and analysis workbooks, in spreadsheet (Excel) format with formulas intact and sources and assumptions identified. If SoCalGas was successful, what factors led to the success? If not, what would SoCalGas do differently if the CPUC adopted a similar target or requirement?
- e. Did SoCalGas meet or exceed the 10 percent increase in average savings across the region target in Ordering Paragraph 5 of D.16-04-040? Please explain how SoCalGas measured success and provide documentation and analysis workbooks, in spreadsheet (Excel) format with formulas intact and sources and assumptions identified. If SoCalGas was successful, what factors led to the success? If not, what would SoCalGas do differently if the CPUC adopted a similar target or requirement?

RESPONSE 16:

- a. SoCalGas presented the attached PowerPoint to Energy Division on January 30, 2017. Any other updates regarding the ESA Program intensification efforts are provided in the Low Income Programs Annual Report each year.

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- b. SoCalGas defines the “intensified” deployment as all ESA Program activity within the designated areas (Ventura County, Orange County, and the Los Angeles Basin) in which a treated home received fewer than three measures or was a go-back. SoCalGas reported on intensified activities in its 2016 and 2017 monthly reports. Full-year figures for the intensification effort are provided in the below table.

2016-2017 SoCalGas ESA Intensification Summary

	Expenditures	Annual Therm Savings	Lifecycle Therm Savings	Homes Treated
2016	\$7,489,968	204,711	2,027,657	18,210
2017	\$16,792,351	4430,986	4,579,768	34,351

- c. Homes in the Aliso Canyon intensification area have been offered the same measures as other homes in SoCalGas’ service territory. Since the start of the intensification period in 2016, SoCalGas has added HE furnace, tub spout, and smart thermostat measures to its portfolio as a result of D.16-11-022⁴ and subsequent advice letters.⁵ These measures are also available to the entire service territory. Additionally, in its 2021-2026 cycle application, SoCalGas has proposed to add CO & smoke alarms and solar water heating⁶ as new measures in the program which would be available territory-wide.
- d. SoCalGas reported year-to-date performance of 3.5% in its December 2016 Low Income monthly report, and 4% in its December 2017 Low Income monthly report, meeting the target in OP4 in both years. SoCalGas did not retain workpapers detailing these calculations; however, the figures were developed by comparing average reported energy savings per home, for all treated units in the designated geographic area that were enrolled as go-backs or that did not meet the former three measure minimum (3MM), against monthly average usage for CARE-qualified customers provided in CARE Table 9. Factors leading to SoCalGas successfully meeting the target include the availability of SoCalGas’

⁴ O.P. 15 and 28.

⁵ AL 5311

⁶ SoCalGas See Direct Testimony of Mark Aguirre and Erin Brooks, date November 4, 2019 at pg. 5.

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full measure mix throughout the Aliso Canyon intensification area, the effectiveness of SoCalGas contractors in identifying and installing all feasible measures, and the introduction in 2017 of the new tub spout measure. In addition, SoCalGas implemented tactics to promote intensification including canvassing lists that were coordinated with direct mail campaigns, leveraging with Southern California Edison on direct mail deployments, direct marketing to high energy users, e-mail campaigns, bill inserts, bill messaging on customer bills, and issuance of press releases on SoCalGas' ESA Program intensification efforts.

- e. SoCalGas delivered 670,537 therms saved in 2015, an average of 55,878 per month in the Aliso Canyon designated area, providing the baseline SoCalGas used in providing monthly reports relative to OP5.

In its December 2016 monthly report, SoCalGas reported a decline, as opposed to the targeted 10% increase, in monthly average therm savings within the Aliso Canyon designated area, compared with the 2015 baseline described above. The decline was 22% if measured monthly since the issuance of D.16-04-040, or 27% if measured on a full year to date basis.

Also, in its December 2017 monthly report, SoCalGas reported an increase in therm savings within the Aliso Canyon designated area of 1% compared with the 2015 baseline. This represented a significant recovery from 2016 levels, but still missed the target set in OP5.

SoCalGas did not retain workpapers calculating these metrics; however, the methodology used was described as follows in SoCalGas' Low Income monthly reports, including the December 2017 Low Income monthly report:

“In 2015, SoCalGas installed measures providing total first year energy savings of 670,537 therms in the RSA for an average of 55,878 therms per month of program operation. For comparison relative to the 10% total energy savings increase target, 2015 output provides a reasonable baseline in terms of a complete year with population parameters and program output relatively most similar to the experience in 2016. The most effective comparisons given the variability of monthly output would be current month RSA savings compared against 2015 average monthly savings, as well as total RSA savings since the issuance of D.16-04-040

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compared against average 2015 savings for the corresponding portion of the year.⁷

SoCalGas' inability to deliver the target level increase in therm savings in the Aliso Canyon designated area can be attributed to a service territory-wide decline in treated unit delivery over the 2015-2016 time period. If the Commission were to adopt a similar, geographically focused, total therm savings goal in the future, SoCalGas may take into consideration redeploying its existing contractors, holding a solicitation to identify additional contractors in the area, or adjusting compensation to encourage higher rates of activity in a targeted area. In addition, as stated in its application, SoCalGas would focus its attention on the unwilling customer and hard-to-reach segments.⁸

⁷ Rules-Suspended Area (RSA).

⁸ SoCalGas See Direct Testimony of Mark Aguirre and Erin Brooks, date November 4, 2019 at pp. 18-22.