

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

**(A.19-11-006)**

**(CALADVOCATES-ESA-CARE-ER-SCG12)**

**RECEIVED: AUGUST 4, 2020**

**SUBMITTED: AUGUST 6, 2020**

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**QUESTION 1:**

What are the barriers of two-way data sharing between SoCalGas and government agencies (such as a county's Social Services office) to promote the CARE and ESA programs?

- a. Has SoCalGas sought solutions for these barriers?
- b. Has SoCalGas established an initiative with any government agencies in the past?
- c. Has SoCalGas explored data-sharing opportunities with the Social Security Administration (SSA) for purposes of enrolling eligible CARE customers?

**RESPONSE 1:**

The barriers of two-way data sharing between SoCalGas and government agencies to promote the CARE Program include the following:

- **Qualification issues:** Government agencies would need to ensure that program qualifications, e.g. definition of household and income guidelines (up to 200% Federal Poverty Guidelines) align with the CARE program.
  - **Categorical Eligibility:** Government agencies would need to adhere to the CPUC adopted Categorical Eligibility (CE) programs.
  - **Cybersecurity, customer privacy and protection concerns:** Government agencies would need to adhere to established confidentiality and cybersecurity procedures and protocols as well as agree to the CPUC's audit procedures and policies.
  - **Resource Barriers:** Government agencies may need additional resources to share data with the IOUs (personnel or technology resources).
  - **IT System Limitations:** Government agency IT systems may not be set up to allow for two-way data transfer with IOU systems.
- a. SoCalGas is willing to collaborate to receive customer data to promote the CARE and ESA Program, but would need to review and approve the customer privacy and cybersecurity procedures and protocols at each government agency prior to any sharing of customer information.
  - b. SoCalGas established a few initiatives with government agencies in the past related to the CARE or ESA Program.

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- Customers who have received a Low Income Home Energy Assistance Program (LIHEAP) pledge, administered by the California Department of Community Services and Development (CSD), are automatically enrolled in SoCalGas' CARE program.
  - Since 2019, SoCalGas shares CARE participant data biannually with CPUC's California Lifeline Administrator.
  - SoCalGas executed an agreement with CSD to leverage the Low Income Weatherization Program (LIWP) to deliver ESA measures as ordered by the CPUC.
- c. SoCalGas has not explored opportunities with SSA for purposes of enrolling eligible CARE customers. Some of the issues involving data sharing with SSA may include:
- Data exchange with SSA raises issues with the Public Charge Rule. The Public Charge Rule issued by the Department of Homeland Security in August 2019 makes it easier for immigration officials to deny applications for permanent residency or temporary visas to immigrants if they are deemed "more likely than not" to become a public charge.
  - Sharing customer information for program promotion and/or enrollment may reduce immigrant customers' participation in CARE out of fear that automatic enrollment in these programs could compromise their immigration status.

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**QUESTION 2:**

What data sharing mechanisms does SoCalGas currently use?

- a. Describe the step-by-step methods used to share CARE customer data with other low- income programs, if any.
- b. What data sharing mechanisms has SoCalGas used in the past?

**RESPONSE 2:**

SoCalGas objects to this Request on the grounds that it is overly broad, vague, and ambiguous by not limiting “data sharing mechanisms” to the scope of the low-income application proceeding. For the purpose of responding to this Request, SoCalGas defines “data sharing mechanisms” as low-income data sharing mechanisms.

Notwithstanding these objections, SoCalGas responds as follows:

SoCalGas currently uses the following mechanisms for data sharing:

- Active SoCalGas customers newly enrolled in CARE provide their signature on the CARE application at the time of enrollment consenting that their information may be shared with other utilities or agents for the purposes of enrollment into other assistance programs.
- SoCalGas’ CARE program shares data (Customer Name and Address) with other IOUs’ CARE Programs (SCE, SDG&E, and PG&E) and the respective water utility rate assistance plans within shared service territories. These utilities’ data sharing protocols and procedures have been vetted through respective cybersecurity and customer privacy teams, and have signed a Memorandum of Understanding (MOU) and Non-Disclosure Agreement (NDA).
- Per CPUC directive, twice a year, SoCalGas also shares all CARE participant information with the CPUC Lifeline Administrator with an attached declaration of confidentiality through the CPUC’s ftp portal [Kiteworks](#).

- a. The step-by-step methods used to share CARE customer data with other utilities or low-income programs is as follows:

1. Review customer consent language to confirm it is appropriate to share customer data with the specified utility/agent for the specified purpose.

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2. Complete assessments and attestations for SoCalGas cybersecurity and customer privacy-related matters.
  3. Sign an NDA for both parties.
  4. Send/Receive customer data over a secure connection such as Secure File Transfer Protocol (SFTP) or via [Electronic Data Transfer](#).
  5. Once data is received, SoCalGas performs a customer match of full name and address and those that have a full match are enrolled in the CARE program.
  6. New CARE customers enrolled via data sharing are mailed an opt-out letter providing them the option of removal from the CARE program.
- b. SoCalGas has used the above-mentioned data sharing mechanisms since the IOUs began data sharing in 2001.

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**QUESTION 3:**

Does SoCalGas produce non-disclosure agreements (NDAs) when participating in data sharing partnerships with outside organizations?

a. If yes, what are the components of these NDAs?

**RESPONSE 3:**

SoCalGas objects to this Request on the grounds that it is overly broad, vague, and ambiguous by not limiting “non-disclosure agreements” to the scope of the low-income application proceeding. For the purpose of responding to this Request, SoCalGas defines “non-disclosure agreements” as non-disclosure agreements applicable to the low-income program. Notwithstanding these objections, SoCalGas responds as follows:

Yes. SoCalGas has broader inter-utility agreements that contain NDAs. Such NDAs include but are not limited to the following components:

- Identification of Parties
- Definition of Confidential Information
- Types of Data Covered by Agreement
- Limited Use Non-Disclosure
- Court or Administrative Order
- Publicity
- Document Retention
- Survival
- Assignment
- Remedies
- Other Business Opportunities
- No Implied Licenses
- No Waiver
- Governing Law
- Data Security
- CPUC and IOU Disclosure
- Protection of Data
- Security Breach Protocol
- Security of Other Party Data