

# Program Administrator Semi-Annual Report out

Q3 CAEECC Meeting  
SoCalGas  
10/28/2024

# Achievement and Forecast Summary

	2023 Confirmed Claim Summary Total System Benefit** (\$)	Q1 2024		Q2 2024		Q1 + Q2 2024	
		Total System Benefit (\$)	Total Expenditure (\$)	Total System Benefit (\$)	Total Expenditure (\$)	Total System Benefit (\$)	Total Expenditure (\$)
		<b>Resource Acquisition</b>	162,076,042	\$21,295,482	\$	\$8,584,708	\$ 22,499,286
<b>Market Support</b>	1,109	\$	\$	\$	\$6,186,844		\$6,186,844
<b>Equity</b>	3,241,096	\$3,306,188	\$	\$2,330,220	\$5,804,396	\$5,636,408	\$5,804,396
<b>EM&amp;V</b>		NA	\$	NA	\$358,351		\$358,351
<b>Codes and Standards</b>			\$		\$818,849		\$818,849
<b>TOTAL Portfolio</b>	<b>\$165,318,247</b>	<b>\$24,601,670</b>	<b>\$</b>	<b>\$10,914,928</b>	<b>\$35,667,727</b>	<b>\$35,516,599</b>	<b>\$35,667,727</b>

2024 Forecast Estimate	
	Total PA Portfolio
	Total System Benefit (\$)
<b>Q1 and Q2 Claims</b>	\$35,516,599
<b>Q3 and Q4 Forecast*</b>	\$137,137,160
<b>Total TSB Forecast Attainment</b>	<b>\$105%</b>
<b>TSB Goal</b>	\$164,432,152
<b>TSB Percent of Goal</b>	<b>22%</b>
<b>Total Expenditure</b>	<b>\$35,667,727</b>

Data Pulled from CEDARS Quarterly Claims Segment Dashboard. Excludes ESA Data

Excludes ESA  
 Q1 and Q2 Claims from CEDARs Quarterly Claims Goal Attainment Dashboard  
 \*Q3 and Q4 from internal EOY forecast  
 \*\*TSB was not a PA goal in 2023 and used a different avoided cost calculator version than 2024.



Claims Summary By Sector								
		Q1 + Q2					Q1+Q2 Total	
		Agricultural	Commercial	Cross-Cutting	Industrial	Public		Residential
TSB		\$43,909	\$8,294,867	\$3,437,848	\$1,083,420	\$16,608	\$22,639,944	\$35,516,599
GHG		4,959	16,352	607,971	6,119	786	122,536	758,696
kWh	Annual Gross		-431	17,478		-18	1,951,075	1,968,103
	Annual Net		-280	11,360		-12	1,703,474	1,714,542
	Lifecycle Net		-5,613	66,011		-180	14,637,334	14,697,551
Therms	Annual Gross	9,525	998,506	27,746,642	103,771	564	2,706,924	31,565,935
	Annual Net	6,191	629,805	14,495,610	86,259	367	1,939,525	17,157,759
	Lifecycle Net	31,123	10,264,227	204,781,905	823,569	5,506	26,353,384	242,259,716
kW	Annual Gross						1,675	1,675
	Annual Net						1,532	1,532

# Third Party Vendor Support and Implementation

## PA Core Program Support Partners

### Agriculture

- N/A

### Commercial

- KW Engineering

### Cross-Cutting

- N/A

### Industrial

- N/A

### Public

- The South Bay Council of Governments
- The Santa Maria Valley Chamber of Commerce (SMVCC)
- The San Joaquin Valley Clean Energy Organization (SJVCEO)
- The San Gabriel Valley Council of Governments (SGVCOG)
- The Western Riverside Council of Governments (WRCOG)

### Residential

- Choice Digital
- RHA

### EM&V

- N/A

### WE&T – International Association of Plumbing and Mechanical Operators (IAPMO)

- Institute of Heating and Air Conditioning Industries (IHACI)
- EnergySoft
- Frontier Energy
- Affinity Engineering
- Steam Plant Solutions

## IOU 3<sup>rd</sup> Party Implementors

### Agriculture

- ICF Resources, LLC

### Commercial

- Bidgey, Inc.
- CEGY
- CLEAResult Consulting, Inc. a Texas Corporation
- Enovity, Inc.
- Franklin Energy Services, LLC
- Frontier Energy, Inc.
- ICF Resources, LLC
- Los Angeles Department of Water & Power
- Richard Heath & Associates, Inc.
- Willdan Energy Solutions

### Cross-Cutting

- N/A

### Industrial

- Cascade Energy, Inc.
- CLEAResult Consulting, Inc.
- Willdan Energy Solutions

### Public

- Eagle Systems International, Inc. dba Synergy Companies
- Energy Infrastructure Partner, LLC
- Okapi Architecture, Inc.

### Residential

- AM Conservation Group, Inc.
- Bidgey, Inc.
- Oracle America, Inc
- City of Burbank
- City of Pasadena
- Eagle Systems International, Inc. dba Synergy Companies
- Enervee Corporation
- Global Energy Services, Inc.
- ICF Resources, LLC
- Richard Heath & Associates, Inc.
- Staples & Associates/Staples Energy
- Williams Furnace Company

### EM&V

- N/A

### WE&T

- ConSol Home Energy Efficiency Rating Services, Inc. (CHEERS, Inc.)
- Global Energy Services, Inc.



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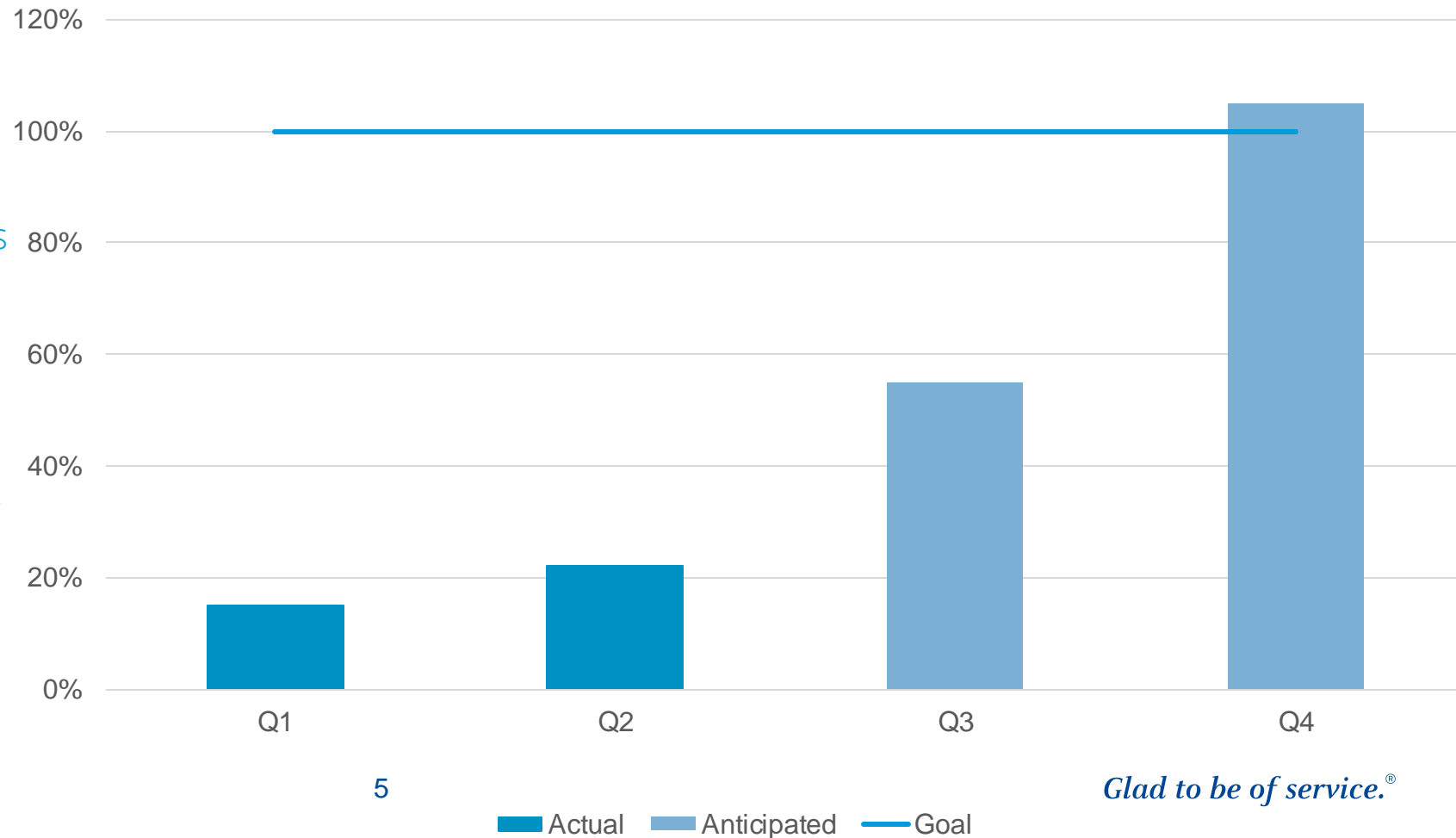
# Anticipated Progress- Resource Acquisition

- SoCalGas is on track to achieve 2024 CPUC TSB goal
- Majority of energy savings/TSB historically occurs in Q4. That trend will hold continue in 2024
- Demand for gas efficiency remains strong (pipeline of committed projects is robust)
- Increasing demand for OBF and financing to support projects
- ~~Bulk of performance will be tracked in Q4 due to timing issue of invoices being submitted/uploaded~~

*[blue denotes changes made 10/24/24]*



## Quarterly Progress towards TSB Goals - Resource Acquisition



## Recent Developments

- RECOGNITION: SoCalGas was awarded the 2024 ENERGYSTAR Partner of the Year award by the Environmental Protection Agency and Department of Energy
- INNOVATION: SoCalGas has digitized its rebate payment process resulting in more payment options, delivered more quickly, and at a lower cost
- AREAS OF SUCCESS: Significant increases in participation across the small and medium business sector for gas efficiency.
- PARTNERSHIP: SoCalGas partners with 17 electric and water utilities to provide gas efficiency, coupled with electric efficiency and water conservation.
  - SoCalGas was recently awarded a \$2M grant from the U.S. Bureau of Reclamation to increase water efficiency in Los Angeles.

*[blue denotes changes made 10/24/24]*

## Recent Segmentation Justification and Program Overlap Submissions

Please respond to the following questions:

1. Was the recent Segmentation Justification exercise helpful to clarify any aspect of your portfolio and its operation? If so, please share relevant conclusions. **The segmentation justification exercise seemed to duplicate information that is already available in CEDARs, Joint Cooperation Memos (JCMs), and provided in Annual Reports where indicators and metrics are reported.**
2. Would you recommend any aspect of it be repeated? If so, with what regularity or with what trigger? **SoCalGas does not recommend the exercise be repeated, since the IOUs and the RENs have monthly or quarterly coordination meetings.**
3. Was the recent Program Overlap Advice Letter helpful to clarify any aspect of your portfolio and its operation? If so, please share relevant conclusions. **SoCalGas and RENs have worked closely together to develop a fully operational verification protocol that allows program staff to determine customer eligibility and prevent double dipping. SoCalGas will continue to follow these processes and adhere to information security standards, noting that if additional coordination is necessary, SoCalGas will follow the coordinating process outlined in the Joint Cooperation Memos.**
4. Would you recommend any aspect of it be repeated? If so, with what regularity or with what trigger? **SoCalGas suggests not pursuing future joint Program Overlap advice letters. SoCalGas will continue their analysis and coordination meetings to understand the scope of program overlap risk.**

## Current Pipeline By Sector

End of Year Projections for Projects Associated with 2024 Claims								
		Q3-Q4 Pipeline					Total Q3-Q4 Projections	
		Agricultural	Commercial	Cross-Cutting	Industrial	Public		Residential
<b>TSB</b>		\$9,599,601.20	\$56,226,235.60	\$10,970,972.80	\$13,713,716.00	\$4,411,411,114.80	\$42,512,519.60	\$137,137,160.00
<b>GHG</b>		4,959	16,352	607,971	6,119	786	122,536	758,696
<b>kWh</b>	<b>Annual Gross</b>	1,701.358	14,585.14	10,556.54	9,694.81	1,886.67	36,739.32	75,163
		432,583	2,494,193	784,538	-716	887,811	2,618,607	7,217,016
	<b>Annual Net</b>	213,297	1,473,769.5	470,582	-429.5	420,707.5	2,158,229.5	4,736,156
	<b>Lifecycle Net</b>	3,328,947	8565574.58	5513472.045	-7458.65758	1713132.101	4652941.377	23766608.5
<b>Therms</b>	<b>Annual Gross</b>	516,267	4,522,998	3,525,309.5	3,203,709.5	1,107,278	8,420,318.5	21,295,880
	<b>Annual Net</b>	307,807.5	2,776,522.5	1,958,363.5	1,855,554	603,892.5	7,378,780.5	14,880,920.5
	<b>Lifecycle Net</b>	3,702,972.028	37,064,563.69	18,814,440.25	13,953,422.7	3,235,954.471	29,478,767.5	106,250,120.5
<b>kW</b>	<b>Annual Gross</b>	516,267	4,522,998	3,525,309.5	3,203,709.5	1,107,278	8,420,318.5	21,295,880
	<b>Annual Net</b>	307,807.5	2,776,522.5	1,958,363.5	1,855,554	603,892.5	7,378,780.5	14,880,920.5
<b>Expenditures</b>		2,255,164.5	15,325,430	15,700,945	6,335,510	4,626,688	29,539,052.5	76,104,553.5