

BEFORE THE PUBLIC UTILITIES COMMISSION  
OF THE STATE OF CALIFORNIA



**FILED**

05-01-12  
04:59 PM

Order Instituting Rulemaking to Examine the Commission's Post-2008 Energy Efficiency Policies, Programs, Evaluation, Measurement, and Verification, and Related Issues.

Rulemaking 09-11-014  
(Filed November 20, 2009)

**SOUTHERN CALIFORNIA GAS COMPANY (U 904G) ENERGY EFFICIENCY  
2011 ANNUAL REPORT INCLUDING WE&T TASK FORCE ANNUAL PROGRESS  
REPORT AND REPORTING ON PROGRAM PERFORMANCE METRICS**

Steven D. Patrick

*Attorney for*

**SOUTHERN CALIFORNIA GAS COMPANY**

555 W. Fifth Street, Suite 1400

Los Angeles, CA 90013-1046

Phone: (213) 244-2954

Fax: (213) 629-9620

E-Mail: [SDPatrick@semprautilities.com](mailto:SDPatrick@semprautilities.com)

May 1, 2012

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

Order Instituting Rulemaking to Examine the Commission’s Post-2008 Energy Efficiency Policies, Programs, Evaluation, Measurement, and Verification, and Related Issues.	Rulemaking 09-11-014 (Filed November 20, 2009)
---	---

**SOUTHERN CALIFORNIA GAS COMPANY (U 904-G) ENERGY EFFICIENCY  
2011 ANNUAL REPORT INCLUDING WE&T TASK FORCE ANNUAL PROGRESS  
REPORT AND REPORTING ON PROGRAM PERFORMANCE METRICS**

Southern California Gas Company (“SCG”) submits the following annual reports:

- (1) *Energy Efficiency Programs Annual Report, 2011 Results* in accordance with the Assigned Commissioner’s Ruling on Revision 4.0 of the Energy Policy Manual issued on March 28, 2008 in Rulemaking 06-04-010;
- (2) *2010-2012 Energy Efficiency Portfolio—Program Performance Metrics Type 2A Report for 2011* in accordance with Resolution E-4385 Ordering Paragraph 6;
- (3) *Energy Efficiency Pilot Programs Annual Target Update 2011 Report* in accordance with SCG Advice Letter 4065-A approved on May 11, 2010;
- (4) *Joint IOU Workforce Education & Training Program Annual Report Statewide Program Update for Program Year 2011* in accordance with Decision (D.)09-09-047 at page 222 and SoCalGas Advice Letter 4249-B approved on October 28, 2011. SCG is submitting this report on behalf of Pacific Gas & Electric Company, Southern California Edison Company and San Diego Gas & Electric Company.

These reports are available on <http://eega.cpuc.ca.gov/Default.aspx> as directed by the December 22, 2011 *Assigned Commissioner’s Ruling Clarifying Fund Shifting Rules and Reporting Requirements*.

Dated this May 1, 2012.

Respectfully Submitted,

By: /s/ Steven D. Patrick  
Steven D. Patrick

*Attorney for*

**SOUTHERN CALIFORNIA GAS COMPANY**

555 W. Fifth Street, Suite 1400

Los Angeles, CA 90013-1046

Phone: (213) 244-2954

Fax: (213) 629-9620

E-Mail: [SDPatrick@semprautilities.com](mailto:SDPatrick@semprautilities.com)

**ENERGY EFFICIENCY ANNUAL REPORT,  
2011 RESULTS**

**SOUTHERN CALIFORNIA GAS  
COMPANY**

**ENERGY EFFICIENCY PROGRAMS  
ANNUAL REPORT**

**2011 RESULTS**



## TABLE OF CONTENTS

Table of Contents .....	i
2011 Energy Efficiency Program Portfolio Summary .....	1
Executive Summary .....	1
Program Descriptions and Strategies .....	21
SCG3600 #Local02 - Local Whole Home Performance Narrative .....	21
SCG3601 #Local05 - Local Non-Residential BID Narrative .....	21
SCG3602 #SW-AgA - Calculated Narrative .....	22
SCG3603 #SW-AgB - Deemed Narrative .....	22
SCG3604 #SW-AgC - Nonresidential Audits Narrative .....	23
SCG3605 #SW-AgD - Pump Test & Repair Narrative .....	23
SCG3606 #SW-AgE - Continuous Energy Improvement Narrative .....	24
SCG3607 #SW-ComA - Calculated Narrative .....	25
SCG3608 #SW-ComB - Deemed Narrative .....	25
SCG3609 #SW-ComC - Nonresidential Audits Narrative .....	26
SCG3610 #SW-ComD - Continuous Energy Improvement Narrative .....	27
SCG3611 #SW-IndA - Calculated Narrative .....	28
SCG3612 #SW-IndB - Deemed Narrative .....	29
SCG3613 #SW-IndC - Nonresidential Audits Narrative .....	29
SCG3614 #SW-IndD - Continuous Energy Improvement Narrative .....	29
SCG3615 #SW-ResA - Multifamily EE Rebates Narrative .....	31
SCG3616 #SW-ResB - Home Efficiency Rebates Narrative .....	32
SCG3617 #SW-ResC - Home Efficiency Energy Survey Narrative .....	32
SCG3618 #SW-ResD - Prescriptive Whole House Retrofit Narrative .....	33
SCG3619 #L-InstP01 - CA Depart of Corrections Partnership Narrative .....	34
SCG3620 #L-InstP02 - CA Community College Partnership Narrative .....	34
SCG3621 #L-InstP03 - UC/CSU/IOU Partnership Narrative .....	35
SCG3622 #L-InstP04 - State of California /IOU Partnership Narrative .....	36
SCG3623 #SW-ME&OB - SW Marketing, E&O FYP Narrative .....	36

SCG3624 #SW-ETA - Assessments Narrative.....	37
SCG3625 #SW-NCNR - NRNC Savings By Design Narrative .....	40
SCG3626 #SW-NCResA - RNC and #SW-NCResA-Energy Star Manufactured Homes Narratives.....	41
SCG3627 #SW-WE&TA - Strategic Planning & Implementation Narrative .....	43
SCG3628 #SW-WE&TB - WE&T Centers Narrative.....	44
SCG3629 #SW-WE&TC - WE&T Connections Narrative.....	46
SCG3630 #LGovP01 - LA County IOU Partnership Narrative .....	47
SCG3631 #LGovP02 - Kern County Energy Watch Partnership Narrative.....	48
SCG3632 #LGovP03 - Riverside County Partnership Narrative .....	49
SCG3633 #LGovP04 - San Bernardino County IOU Partnership Narrative.....	50
SCG3634 #LGovP05 - Santa Barbara County IOU Partnership Narrative .....	50
SCG3635 #LGovP06 - SBCCOG Partnership Narrative.....	51
SCG3636 #LGovP07 - San Luis Obispo County Partnership Narrative .....	51
SCG3637 #LGovP08 - Tulare County-Visalia Energy Watch Partnership Narrative.....	52
SCG3638 #LGovP09 - Orange County Cities Partnership Narrative.....	53
SCG3639 #LGovP10 - ILG-ICLEI-LGC Partnership Narrative .....	54
SCG3640 #LGovP11 - Community Energy Partnership Narrative.....	54
SCG3641 #LGovP12 - Desert Cities Partnership Narrative.....	55
SCG3642 #LGovP13 - VCREA Sub-Program Partnership Narrative.....	56
SCG3644 #Local01 - OBF Narrative .....	57
SCG3645 #Local03 - Local Sustainable Communities Narrative .....	58
SCG3646 #Local04 - Local Strategic Develop & Integ Narrative .....	59
SCG3647 #SW-C&SA - Building Standards Advocacy Narrative .....	59
SCG3648 #SW-C&SB - Appliance Standards Advocacy Narrative.....	60
SCG3649 #SW-C&SC - Compliance Training Narrative .....	60
SCG3650 #SW-C&SD - Reach Codes Narrative .....	61
SCG3651 #SW-HVACA - Residential Energy Star Quality Installation Narrative.....	61
SCG3652 #SW-HVACB - Commercial Quality Installation Narrative .....	62
SCG3653 #SW-HVACC - Commercial Upstream Equipment Narrative .....	62
SCG3654 #SW-HVACD - Quality Maintenance Program Narrative .....	62
SCG3655 #SW-HVACE - Technology & Systems Diagnostics Narrative.....	63

SCG3656 #SW-HVACF - HVAC WE&T Narrative .....	63
SCG3657 #SW-HVACG - HVAC Core Narrative.....	64
SCG3658 #SW-IDSMS - SW Integrated DSM Narrative .....	65
SCG3659 #SW-ME&OC - ME&O Strategic Plan Narrative .....	67
SCG3660 #3P-NRes1 - Steam Trap and Compressed Air Survey Narrative .....	68
SCG3661 #3P-NRes2 - Energy Challenger Narrative.....	68
SCG3662 #3P-NRes3 - Small Industrial Facility Upgrades Narrative.....	69
SGC3663 #3P-NRes4 - Program for Resource Efficiency in Private Schools Narrative.....	70
SCG3664 #3P-Res01 - On Demand Efficiency Narrative.....	71
SCG3665 #3P-Res02 - HERS Rater Training Advancement Narrative .....	71
SCG3666 #3P-Res03 - Multifamily Home Tune-Up Narrative .....	73
SCG3667 #3P-Res04 - Multifamily Solar Pool Heating Narrative .....	73
SCG3668 #3P-Res05 - Community Language Effic Outreach Narrative .....	74
SCG3669 #3P-Res06 - Multifamily Direct Therm Savings Narrative .....	74
SCG3670 #3P-Res07 - LivingWise™ Narrative .....	75
SCG3671 #3P-Res09 - Manufactured Mobile Home Narrative .....	76
SCG3672 #3P-Xc01 - Gas Cooling Retrofit Narrative.....	77
SCG3673 #3P-Xc02 - SaveGas – Hot Water Control Narrative .....	78
SCG3674 #3P-Xc03 - Upstream High Efficiency Gas Water Heater Narrative .....	78
SCG3675 #3P-Xc04 - California Sustainability Alliance Narrative .....	79
SCG3676 #3P-Xc05 - Portfolio of the Future (PoF) Narrative .....	80
SCG3677 #3P-Xc06 - PACE Energy Savings Project Narrative .....	82
Section 1 Energy Savings .....	1-1
Table 1 .....	1-2
Section 2 Emission Reductions.....	2-1
Table 2 .....	2-2
Section 3 Expenditures .....	3-1
Table 3 .....	3-2
Section 4 Cost Effectiveness.....	4-1
Table 4 .....	4-2
Section 5 Bill Payer Impacts.....	5-1

Table 5 .....	5-2
Section 6 Green Building Initiative .....	6-1
Table 6 .....	6-2
Section 7 Shareholder Performance Incentives .....	7-1
Section 8 Savings by End-Use.....	8-1
Table 8 .....	8-2
Section 9 Commitments.....	9-1
Table 9 .....	9-2
Appendix A – SoCalGas Program Numbers .....	A-1
Appendix B – Updated Monthly Report.....	B-1

## **2011 ENERGY EFFICIENCY PROGRAM PORTFOLIO SUMMARY**

### **Executive Summary**

---

#### **Overview**

Southern California Gas Company's (SoCalGas) 2011 portfolio of programs included local and statewide efforts, city and county partnerships, and competitively bid third party programs. Statewide programs are coordinated with the four California Investor Owned Utilities (IOUs): Pacific Gas and Electric Company (PG&E), Southern California Edison Company (SCE), SoCalGas, and San Diego Gas and Electric Company (SDG&E). Although SoCalGas' focus was on achieving energy and demand reductions, the 2011 portfolio also included non-resource programs such as customer information, education, marketing, and outreach programs.

Please Note: The energy savings and other cost-effectiveness parameters for many measures contained in this report, and its supporting documentation, are preliminary since the California Public Utilities Commission (CPUC) Energy Division review of SoCalGas' workpapers is yet to be completed. SoCalGas is working closely with the Energy Division and their consultants to complete this process in the near future.

#### **Statewide Agricultural Energy Efficiency Program**

The Statewide Agricultural Energy Efficiency Program offers strategic energy planning support; technical support, such as facility audits and calculation and design assistance; and financial support through rebates and incentives aimed at providing integrated energy management solutions: energy efficiency (EE), demand response (DR), and distributed generation (DG), including renewables. Targeted segments from the agricultural sector may include agricultural growers (crops, fruits, vegetable and nuts), greenhouses, post-harvest processors (ginners, nut hullers, and associated refrigerated warehouses), dairies, and water and irrigation districts/agencies. Targeted segments from the food processing sector include fruit and vegetable processors (canners, dryers, and freezers), prepared food manufacturers, wineries, and other beverage manufacturers.

The Statewide Agricultural Program includes five statewide subprograms: Calculated Incentives; Deemed Incentives; Continuous Energy Improvement (CEI); Nonresidential Audits – audits include basic audits, integrated audits, and retro-commissioning audits – which provide an inventory of technical project opportunities and financial analysis information; and Pump Efficiency Services.

Each utility also offers local program elements such as Third Party and Local Government Partnership programs that complement and enhance these core offerings in their region.

### **Agricultural Calculated**

The program fell short of the projected 2011 savings goal objectives due to the complex nature of the projects involved and the less than stellar economic performance of the state in general.

### **Agricultural Deemed**

The program fell short of the projected 2011 savings goal objectives due mainly to the less than stellar economic performance of the state in general. Customers indicated a lack of capital dollars to invest in energy efficiency projects until the economy picks up.

### **Agricultural Nonresidential Audits**

During 2011, the program met and exceeded the non-residential onsite audit goals for the year. Enhancements were made to the onsite audit tool to document integrated opportunities and/or improvements.

### **Agricultural Pump Test & Repair**

In 2011, this program offering was something that the agricultural customers were already very aware of and utilized in order to identify inefficiency. There was participation in education seminars and marketing and outreach events.

### **Agricultural Continuous Energy Improvement**

In 2011, the Agricultural Continuous Energy Improvement (CEI) projects began moving from the assessment phase into the implementation phase. By design, the CEI customers come from very different market segments. However, none were directly from the agricultural segment. Some of the food processors were closely connected to the agricultural industry classified as industrial customers. The recruitment of such a diverse group of customers has been a success in accomplishing the intent of the program pilot, which is to enhance the program's learning experience and identify the specific barriers in each market segment to provide interesting insights that should help shape future CEI offerings.

## **Statewide Commercial Energy Efficiency Program**

The Statewide Commercial Energy Efficiency Program offers strategic energy planning support; technical support, such as facility audits, and calculation and design assistance; and financial support through rebates and incentives aimed at providing integrated energy management solutions: energy efficiency, demand response, and distributed generation, including renewables. Targeted segments include distribution warehouses, office buildings, hotels, motels, restaurants, schools, universities, colleges, hospitals, high tech facilities, bio tech facilities, retail facilities, entertainment centers, and smaller customers that have similar buying characteristics.

The five statewide subprograms described below — Calculated Incentives, Deemed Incentives, Continuous Energy Improvement, Direct Install (not offered by SoCalGas), and Nonresidential Audits —comprise the core product and service offerings for the Commercial program. Each utility also offers local program elements such as Third Party and Local Government Partnership programs that complement and enhance these core offerings in their region.

### **Commercial Calculated**

The SoCalGas Commercial Calculated program exceeded the projected 2011 savings goal objectives due to a significant number Partnership projects closing in 2011.

### **Commercial Deemed**

The SoCalGas Deemed Program fell short of the projected 2011 savings goal objectives due mainly to the lack of capital dollars to invest in energy efficiency projects during this downturn in the economy. The program supported the growth in outreach to trade allies and other delivery channels.

### **Commercial Nonresidential Audits**

In 2011, the program met and exceeded the non-residential onsite audit goals for the year. Enhancements were made to the onsite audit tool to document integrated opportunities and/or improvements.

The retrocommissioning (RCx) effort to expand the standardizing of energy savings calculation methodologies for higher impact common RCx measures, thereby ensuring consistent analysis of building systems and equipment, a Commercial Building Optimization Analysis (CBOA) tool was introduced.

### **Commercial Continuous Energy Improvement**

In 2011, the Commercial Continuous Energy Improvement (CEI) projects began moving from the assessment phase into the implementation phase. By design, the five CEI commercial customers come from very different market segments: a four-star rated hotel, a county government, a grocery chain, a K-12 private boarding school, and a national restaurant chain. The recruitment of such a diverse group of customers has been a success in accomplishing the intent of the program pilot, which is to enhance the program's learning experience and identify the specific barriers in each market segment to provide interesting insights that should help shape future CEI offerings.

Recruitment uptake increased significantly in the last quarter of 2011 by identifying one of the barriers associated with helping customers to see the value propositions of CEI.

## **Statewide Industrial Energy Efficiency Program**

The Statewide Industrial Energy Efficiency Program partners with industry stakeholders to promote integrated energy management solutions to end use customers. Customers from the industrial sector include printing plants, plastic injection molding facilities, component fabrication, lumber and paper mills, cement and quarries, metals processing, petroleum refineries, chemical industries, assembly plants, and water and wastewater treatment plants.

The four statewide sub-programs—Non-Residential Audits, Calculated, Deemed, and Continuous Energy Improvement—comprise the core product and service offerings for the Industrial market. Each utility also offers local program elements such as Third Party and Local Government Partnership programs that complement and enhance these core offerings in their region.

### **Industrial Calculated**

The SoCalGas Industrial Calculated program exceeded the projected 2011 savings goal objectives due to projects initiated in prior years coming to completion.

### **Industrial Deemed**

The SoCalGas Industrial Deemed Program met projected 2011 savings goal objectives with increased activity in the steam trap replacement program.

### **Industrial Nonresidential Audits**

During 2011, the program came close to meeting the non-residential onsite audit goals for the year. Enhancements were made to the onsite audit tool to document integrated opportunities and/or improvements.

### **Industrial Continuous Energy Improvement**

In 2011, the Industrial Continuous Energy Improvement (CEI) projects began moving from the assessment phase into the implementation phase. By design, the twelve CEI industrial customers come from very different market segments: food processing, industrial laundering, smelting, carpet manufacturing, and the aerospace industry. The recruitment of such a diverse group of customers has been a success in accomplishing the intent of the program pilot, which is to enhance the program's learning experience and identify the specific barriers in each market segment to provide interesting insights that should help shape future CEI offerings.

Recruitment uptake increased significantly in the last quarter of 2011 by identifying one of the barriers associated with helping customers to see the value propositions of CEI.

## **Residential Energy Efficiency Program**

California has set an ambitious market goal of reaching all 13 million existing homes with comprehensive energy efficiency improvements by 2020. To achieve significant progress toward this goal, programmatic efforts must be more integrated, and coordinated and scaled significantly over the next nine years. To work towards this goal California's investor owned utilities (IOUs) have been and will continue to work closer with the publicly owned utilities (POUs), water agencies, and other organizations in the state. In the 2010-2012 program cycle, the IOUs continue to offer comprehensive activities to reach California's diverse population, climate zones and socio-economic classes to tap the economic potential available while advancing the initiatives of California's Long Term Energy Efficiency Strategic Plan (CLTEESP).

The 2010-2012 California Statewide Program for Residential Energy Efficiency (SPREE) is designed to offer and promote specific and comprehensive energy solutions within the residential market sector. The Residential portfolio employs various strategies and tactics to overcome market barriers and to deliver programs and services aligned to support the Strategic Plan by encouraging adoption of economically viable energy efficiency technologies, practices, and services.

### **Multifamily Energy Efficiency Rebates**

Efforts were made to outreach to the multifamily sector in 2011 via tradeshow, events, and print ads. However, due to the high cost of measures in the Multifamily Energy Efficiency Rebates Program and the economy in California in 2011, there was reluctance on the part of property owners and managers to spend on improvements to their properties that they did not deem absolutely necessary. As a result, the program did not reach its goal in 2011.

### **Home Energy Efficiency Rebates**

During the first quarter of 2011, the year continued with an overall poor economy, high unemployment rate and a depressed housing market were huge barriers and negative influencers to the Home Energy Efficiency Rebates (HEER) Program. Despite this, the program continued to meet and exceed both annual and program cycle goal savings objectives. Much of the continued success was due in part to the carry over effects of the Cash for Appliances program which ended in December 2010.

### **Home Energy Efficiency Survey**

In 2011, the Home Energy Efficiency Survey (HEES) Program performance was consistent with 2010. Online and mail-in participation was steady from month to month, with outreach and specific campaigns to green schools and other targeted marketing providing much of the success. HEES was promoted via the Los Angeles County Fair and other outreach efforts throughout SoCalGas territory. E-blasts were sent from SoCalGas to customers urging them to take the

online survey, and the third party program, PACE, contributed significantly to the use of in-language surveys.

SoCalGas HEES achievements far surpassed its goals for 2011.

### **Prescriptive Whole House Retrofit**

The Energy Upgrade California (EUC) Program launched as of January 1<sup>st</sup>, 2011 to the customer. SoCalGas had over 160 contractors trained and enrolled in the Local and Statewide Whole House Program. SoCalGas also launched the gas-only EUC Program to the municipality service territory that was not being served by the joint SoCalGas/SCE program. SoCalGas is now currently offering this program throughout its entire service territory.

## **Statewide Emerging Technologies Program**

The Statewide Emerging Technologies Program (ETP) is designed to support increased energy efficiency market demand and technology supply (the term supply encompassing breadth, depth, and efficacy of product offerings) by contributing to development and deployment of new and under-utilized EE measures—including technologies, practices, and tools—and by facilitating their adoption as measures supporting California’s aggressive energy and demand savings goals.

ETP includes the following elements or sub-programs: Technology Assessments, Demonstration Showcases, Scaled Field Placements, Market & Behavioral Studies, Technology Development Support, and Technology Resource Incubation & Outreach.

Strategies implemented in 2011 included:

- Accelerated the introduction of EE technologies and analysis tools not widely adopted in various California markets.
- Verified the performance of the technologies in the laboratory under control conditions, as well as in the field.
- Developed computer simulation tools to calculate the energy savings for various energy measures.
- Transferred assessment results to EE Programs for use in creating energy measures.
- Transferred acquired knowledge to customers as well as engineering and design communities.
- Conducted workshops for both internal and external customers.
- Coordinated with other utilities through the Emerging Technology Coordinating Council.
- Developed a statewide database for tracking ET projects.
- Developed an Operations and Procedures Guide.
- Kicked off the first ET Open Forum to solicit technologies from the technology development community.

## **Statewide Marketing, Education & Outreach Program**

The purpose of Marketing, Education, and Outreach (ME&O) is to increase utility consumer awareness and participation in cost-effective energy-saving activities offered by the utilities, as well as to promote behavior changes that result in energy management efforts that save energy and reduce greenhouse gas (GHG) emissions. To be successful, ME&O must move consumers through a transitional process from awareness and knowledge of energy efficiency to action.

The IOUs and CPUC conducted a Brand Assessment and revised the Flex Your Power (FYP) brand and campaign which was completed in 2009. This assessment was presented to parties at a public workshop on December 3, 2009. These results informed the decision to retire the FYP brand to make way for a new approach that will encourage greater behavior change in California's ratepayers. The Brand Assessment resulted in the creation of a new statewide "smart energy living" brand, called Engage 360.

### **Statewide ME&O**

An Assigned Commissioner Ruling Regarding the Statewide ME&O Program was issued October 13, 2011, which officially suspended all ME&O activities until Commission Staff could provide Commissioner Ferron recommendations on how to re-strategize the program. Parties were asked to provide their recommendations about program design, which each utility did.

### **ME&O Strategic Plan**

In 2011, no additional program activities took place between September and December.

## **Statewide New Construction Program**

The Statewide New Construction Program promotes energy efficiency and use of energy-efficient measures by consumers. Statewide new construction programs include: Savings by Design (SBD) for the non-residential segment, California Advanced Homes (CAHP) for the residential site-built segment, and Energy Star Manufactured Homes for the residential factory-built segment. The new construction program focuses on the maximization of energy efficiency as an energy resource.

### **Savings By Design**

In 2011, considering the slowdown in the building industry and the overall market limitations, SoCalGas achieved satisfactory progress in its approaches to generate therm savings. SoCalGas executed therm savings co-funding agreements with SCE's SBD and Partnership Programs, and established cooperative relationships. SoCalGas was able to forge a successful working relationship with the Los Angeles Department of Water and Power (DWP). Collaborative approaches relevant to various utility programs including SBD and CAHP were discussed with the DWP personnel at various levels. The Los Angeles Business Council proved to be an excellent conduit for facilitating the relationships. Opportunities for joint implementation of

SBD, along with CAHP, such as innovative water saving measures such as thermostatic valves, were actively pursued.

### **California Advanced Homes**

By December 2011, the program had enrolled 10,500 units. CAHP met the annual therm savings goal in 2011. In spite of a continuing slump in new construction activity, project enrollments continued at a brisk pace. By midyear, the program incentives were over-subscribed. In accordance with the energy savings sharing agreement with SCE, SoCalGas referred several projects from the joint service territories to SCE for enrollment and processing, but continued to enroll projects in the municipal territories. The program also continued to experience significant cost savings from partnering on CAHP program support materials, trade advertising, sponsorships, shows/events, etc.

### **Energy Star Manufactured Homes**

In mid/late 2011, the program development plan was modified to more fully utilize the expertise and network of Systems Building Research Alliance (SBRA) to more effectively implement the program. The SoCalGas strategy changed from relying primarily on the projects SCE enrolled, and purchasing their therms, to a more proactive relationship with SBRA coordinating a joint program with SCE. This was done to better ensure success, allow for more participation, and minimize customer confusion in overlapping and non-overlapping service territories. To that end, a contract was developed and signed with SBRA in 2011 to facilitate this revised program approach. A modified agreement between SCE and SBRA to support this joint program approach was also negotiated.

This program did not yet have specific energy savings goals. As such, goals will be created as the workpaper is completed and the local market and anticipated volume are better understood.

## **Statewide Workforce Education & Training Program**

The Statewide Workforce Education & Training (WE&T) Program represents a portfolio of education, training, and workforce development planning and implementation funded by or coordinated with the IOUs. The program's three subprograms are Connections, Centergies, and Strategic Planning.

### **WE&T Strategic Planning & Implementation**

In 2011, the IOUs submitted an Advice Letter that outlined general plans for implementation of a Sector Strategies approach for evolving IOU WE&T Training and curriculum development through expanded collaboration. The Advice Letter was approved in October 2011 at which time the plan outlined in the Advice Letter was formally initiated. Specific comments and proposals on recommendations were provided in the respective WE&T Centergies and WE&T Connections sections of this Advice Filing.

## **WE&T Centers**

During 2011, the SoCalGas WE&T Centergies subprogram conducted 221 trainings/seminars, 40 outreach consultations, and 218 equipment demonstration tours. While objectives such as helping to improve the quality and qualifications of the green energy workforce, and increasing new pathways into energy efficiency careers have not changed, the state budget, national economic crises, and labor market instability led to challenges beyond the direct control of the IOUs. These factors created difficulties in implementing a sustainable, comprehensive, and transformative program.

## **WE&T Connections**

In 2011, the program achieved its deliverable of having 3-6 paid interns working at each campus per school semester/quarter. It also exceeded its deliverable of outreaching to an average of 750 interns and other students per semester/quarter.

## **Statewide Codes & Standards Program**

The Codes and Standards (C&S) Program saves energy on behalf of ratepayers by influencing improvement in energy efficiency regulations, by improving compliance with existing codes and standards, and by working with local governments to develop ordinances that exceed statewide minimum requirements. C&S program activities extend to all buildings and potentially any appliance in California, for both advocacy and compliance improvement.

The C&S program aggressively supports the goals of the Strategic Plan which highlights the role of C&S in meeting Assembly Bill (AB) 32 objectives, including Building Code and Appliance Standards Advocacy, Compliance Enhancement and Reach Code technical support.

### **C&S Building Standards Advocacy**

The 2011, savings goal for Building Standards Advocacy is on track. Much of the savings is to be determined at a later date after the CPUC evaluators complete attribution studies. In addition, the statewide C&S IOU team conducted research, analysis, and stakeholder meetings in support of numerous CASE studies for 2013 Title 24 proceedings.

### **C&S Appliance Standards Advocacy**

The 2011, savings goal for C&S Appliance Standards Advocacy is on track. Much of the savings is to be determined at a later date after the CPUC evaluators complete attribution studies. Due to a lack of resources at the California Energy Commission a limited scope of standards will be addressed during this cycle.

### **C&S Compliance Training**

In 2011, the statewide C&S Compliance Training team delivered role-based training sessions, established a compliance improvement advisory group to provide industry guidance to IOUs, supported improvements to certified energy analyst examinations, and commenced a local government best practices survey. In addition, the 2011 savings goal for C&S is on track. Much of the savings is to be determined at a later date after the CPUC evaluators complete attribution studies.

### **C&S Reach Codes**

The 2011 savings goal for C&S Reach Codes is on track. Much of the savings is to be determined at a later date after the CPUC evaluators complete attribution studies. Economic downturn in the State is creating resistance to mandatory ordinances. There is resistance to the reach code revision process from the building industry, some local elected officials in addition to some lighting organizations.

## **Statewide Heating Ventilation and Air Conditioning Program**

The Statewide Residential and Commercial Heating Ventilation and Air Conditioning (HVAC) Program delivers a comprehensive set of downstream, midstream, and upstream strategies that builds on existing program, education, and marketing efforts and leverages relationships within the HVAC industry to transform the market towards a sustainable, quality driven market. Market transformation and direct energy savings and demand reductions are achieved through a series of six sub-program that make up the comprehensive program approach.

### **HVAC Residential Energy Star Quality Installation**

In 2011, feasibility research is on-going to offer a HVAC residential Quality Installation through a joint utility strategy. SoCalGas worked with the Statewide HVAC Committees individually and through the Western HVAC Performance Alliance (WHPA) on all Statewide Program Implementation Plans for implementation and logistics. SoCalGas also engaged with industry feedback on existing programs. In addition, SoCalGas worked with SCE to determine energy savings and cost effectiveness of measures by climate zone.

### **HVAC Commercial Quality Installation**

In 2011, SoCalGas researched gas measure cost-effective opportunities for the Commercial Quality Installation program.

### **HVAC Commercial Upstream Equipment**

As of 2011, SoCalGas has not developed a program for this element because (1) the EE technology in gas furnaces is limited due to high cost, and (2) the strategy had a higher impact on electric savings than natural gas savings.

### **HVAC Quality Maintenance Program**

SoCalGas continued research efforts in 2011 to identify viable measures and determine the cost-effectiveness of implementing a Residential and Commercial Quality Maintenance program. Feasibility research is on-going to offer the program through a joint utility strategy.

### **HVAC Technology & Systems Diagnostics**

The program was not fully implemented in 2011. Effort has been made to collaborate with Emerging Technologies Program to identify and evaluate viable and cost effective technology.

### **HVAC Workforce Education & Training**

SoCalGas offered a series of HVAC related topics through the SoCalGas Education and Training Program to aid the process during 2011.

### **HVAC Core**

In 2011, as stipulated in the co-programs, the program successfully recruited, organized, and managed the different elements to achieve the goals as set forth in the California Long Term Energy Efficiency Strategic Plan.

## **Statewide Integrated Demand Side Management**

In 2011, the IOUs developed a whitepaper on Integrated Demand Side Management (IDSM) Cost Effectiveness presented in a public workshop, created internal IDSM Core Teams, delivered on-going IDSM Training and tracked multiple integrated emerging technologies and reviewed various projects and programs to identify integration efforts and opportunities to develop best practices.

In addition, the IOUs submitted four joint quarterly reports for 2011, including an Executive Summary section, to provide Energy Division staff with updates on the eight integration directives.

## **Local Government Partnership Programs**

SoCalGas Government Partnership program is complex and multi-dimensional to capture the varied ways that SoCalGas works with governments in its 2010-2012 portfolio. First, local governments are a distinct customer segment that operates with their own unique challenges and needs related to energy efficiency. Second, local governments also serve as a delivery channel for specific products and services when they serve as Local Government Partnerships. Finally, local governments have a unique role as leaders of their communities. Increasingly, local governments are interpreting their moral responsibility for community well-being to include reducing greenhouse gas (GHG) emissions, increasing renewable energy usage, protecting air quality, creating green jobs, and making the community more livable and sustainable.

The Government Partnership Program is designed to reach local governments in all of their roles. Depending upon the activity, SoCalGas may play a different role with the local government, ranging from service provider to supporter to equal partner. Governments increasingly engage in strategic planning for GHG reduction not only in their facilities (represented in the municipal GHG inventory) but also in the community (analyzed in the community GHG emissions inventory). Opportunities increase for partnerships with utilities to meet mutual goals of energy reduction. These governments can not only coordinate and integrate demand-side management opportunities in each sector or market they influence, but also effectively leverage and promulgate low-income offerings.

### **Los Angeles County IOU Partnership**

In 2011, the partnership continued to build on the success of funneling projects to SoCalGas Core programs. Several RCx projects are currently underway in County Facilities. In addition, the Partnership continued meetings with departments outside of the Internal Services Department, in order to promote additional energy savings opportunities. The program staff also supported the launch of Los Angeles County Energy Upgrade California which provides incentives which compliment the IOU incentives.

### **Kern County Energy Watch Partnership**

During 2011, the Kern County Energy Watch Partnership continued to make progress completing strategic plan support objectives. Areas of focus included assistance for code compliance, reach codes, guiding documents, community financing, and peer to peer. SoCalGas has also been assisting the County of Kern, and Cities to move forward with EE projects.

### **Riverside County Partnerships**

The partnership continued supporting several New Construction projects which were not impacted by budgetary issues. The partnership has built momentum and identified numerous projects that should be completed by year end 2012.

### **San Bernardino County IOU Partnership**

In 2011, the top county facilities with the greatest opportunity were identified and targeted for the retrofit, RCx, and new construction elements. The County completed several SBD and energy retrofit projects that supported the Partnership to achieve its three year goal in 2011. The County implemented their Strategic Plan task of installing a Utility Manager Software upgrade to allow them to track and pay utility bills countywide.

### **Santa Barbara County IOU Partnership**

The partnership supported the launch of Energy Upgrade California Program (EUC). The partnership coordinated with the County of Santa Barbara's EmPower program which compliments EUC by providing financing options to complete EE retrofits. The partnership also

made progress building interest for cities to implement EE retrofits with the City of Santa Maria, City of Carpinteria, City of Santa Barbara, and the County of Santa Barbara.

### **South Bay Cities Council of Governments Partnership**

During 2011, the Partners continued to meet monthly with IOU regional representatives to effectively share information about program implementation of EE projects, Energy Action Plans and discuss upcoming South Bay Cities Council of Governments' (SBCCOG's) South Bay Environmental Services Center (SBESC) regional events and workshops. The Partnership worked with SoCalGas technical staff to identify gas projects within the Partnership public agencies to close projects and secure opportunities to meet projected energy saving goals.

### **San Luis Obispo County Partnership**

In 2011, emphasis was placed on better engaging the municipal partners, identification of municipal retrofit projects and potential funding sources. Significant savings were realized by the municipal facilities through participation in the Small Business Direct Install program. These benefits were primarily related to lighting retrofits and HVAC tune-up measures.

### **Tulare County-Visalia Energy Watch Partnership**

The partnership made strong progress supporting California Long Term Energy Efficiency Strategic Plan. The partnership has also made key advancement with Benchmarking of City and County facilities, and is on target to complete the objective by year end 2012. SoCalGas continues to work with the Cities and Counties to identify and funnel EE retrofit projects to Core rebate and incentive programs; however, economic conditions have made it very challenging for cities to justify upgrades.

### **Orange County Cities Partnership**

The cities, SoCalGas and SCE conducted monthly partnership meetings to plan the execution of municipal facility retrofit projects, strategic plan activities and marketing, education, and outreach activities. The cities are completing their energy projects with Huntington Beach completing two incentive applications for gas savings and implementing project. One project is to retro-commission the city's largest facilities and improving the efficiency of the cities potable water system. Gas savings amounts were limited by the actionable gas use given the nature of the distributed infrastructure of cities and existing capital improvement programs for the cities with natural gas fired water pumping.

### **Institute for Local Government - International Council for Local Environmental Initiatives - Local Governmental Commission Partnership**

During 2011, International Council for Local Environmental Initiatives (ICLEI) began developing and delivering a suite of resources to aid local governments with the implementation of energy efficiency measures, reducing related greenhouse gas emissions. As of December 31, 2011, ICLEI had conducted 18 in-person workshops and 2 webinars; and has completed the

following tools and/or guidance documents: guidance on municipal and community-wide GHG inventories, an online municipal GHG inventory tool, an online community-wide GHG inventory tool, guidance on emission forecasting and target setting, a Climate Action Planning guidebook and template, a sample Climate Action Plan with measures, the Climate & Air Pollution Planning Assistance (CAPP) tool, and the City Planners' Energy Action Handbook.

### **Community Energy Partnership**

Community Energy Partnership (CEP) is a non-resource program for SoCalGas with the intent of funneling projects to Core programs. In 2011, working closely with individual city and its staff, a pipeline of growing number of gas projects has been developed. The program has achieved 45% of its target gas savings goal for 2010-12. SoCalGas has successfully leveraged On Bill Financing (OBF) funding to expand the scope of a municipal project to achieve greater energy savings. SoCalGas started working on a municipal waste treatment project that has significant gas savings potential. It is anticipated that the program would reach its savings goals in 2012.

### **Desert Cities Partnership**

During 2011, the Desert Cities Partnership continued to be faced with budget constraints and staffing issues which made it challenging to identify and implement energy programs. The Partnership conducted several workshops including Reach Codes and Climate Action Plan training to promote Strategic Plan support and Coachella Valley Association of Governments continues to make great strides implementing their Green Government Initiative.

### **Ventura County Regional Energy Alliance Sub-Program Partnership**

In 2011, Ventura Partnership Program (VREA) highlights included: Four Technical Training Seminars benefitting approximately 138 individuals; ten Community Events reaching approximately 18,800 individuals; coordination of a BOC Level I Course for the region benefitting 11 local government agencies and including 23 staff/individuals; Strategic Planning Efforts – Six workshops and meetings covered planning efforts and energy code topics benefitting approximately 97 individuals; six bi-monthly newsletters in print and electronic formats, as well as operation of informational website; marketing and information outreach to 17 kiosks located at Libraries, Chambers of Commerce, and City Halls throughout Ventura region; and continued to build a project pipeline to achieve energy savings in municipal facilities.

## **Local Institutional Partnership Programs**

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. SoCalGas 2010-2012 statewide partnership portfolio will focus strongly on supporting the key California Energy Efficiency Strategic Plan goal of DSM integration and coordination, which includes establishing integration procedures, piloting DSM integration programs, and improving regulatory coordination. The

2010-2012 Institutional Partnerships will also concentrate on innovative delivery channels and funding mechanisms to meet current economic conditions and achieve program integration and savings.

### **California Department of Corrections Partnership**

There were project funding challenges due to the state budget cuts, however, that did not affect the program in 2011. The program's savings goals and incentive funding are in commercial core programs. The CDCR Partnership achieved 214% of the term goal and 93% of the incentive goal statewide for 2011.

### **California Community College Partnership**

Developments in 2011 for the California Community College Partnership (CCC) included the establishing of Campus Forums, hosted quarterly at campuses across the State. This forum serves as a venue for districts to share successes and strategies for overcoming obstacles. The Management Team also began working with CCC Board of Governor Member Henry A. J. Ramos to build greater recognition of the program's achievements both in and out of the community college system.

### **University of California/California State University/IOU Partnership**

The University of California/California State University/IOU Partnership program became non-resource in the current program cycle. The program's savings goals and incentive funding are in the commercial core programs. The program completed projects totaled nearly 83% 2011 program goal, and nearly \$13 million in incentive funds using approximately 86% of the 2011 program budget.

### **State of California/IOU Partnership**

The program did not meet its 2011 goals. American Recovery and Reinvestment Act (ARRA) funding was available and used by the Partnership to get a number of projects off the ground. However, the small scale of some of the projects inhibited their approval by the ARRA fund allotment project approval process from the State (an internal prioritization of ARRA funds). Addressing the funding issues of the State of California, finding engineering service companies willing to float the upfront costs of expensive gas projects, as well as long pay-back periods for the projects prevented the program from performing to goals.

## **Other Local Programs**

### **Local Whole House Home Performance**

The joint SoCalGas/SCE Energy Upgrade California (EUC) Program launched to the customer as of January 1<sup>st</sup>, 2011. The program had over 160 contractors trained and enrolled in the Local and Statewide Whole House Program. SoCalGas also launched the gas-only Energy Upgrade

California Program to the municipality service territory that was not being served by the joint SoCalGas/SCE program. SoCalGas is now currently offering this program throughout its entire service territory.

### **Local Non-Residential Bid**

The program exceeded the projected 2011 savings goal by over 700%. A comprehensive project initiated by SoCalGas saved approximately 3 million therms.

### **On-Bill Financing**

In 2011, On-Bill Financing (OBF) financed seven energy efficiency projects with a total of approximately \$210,000 in loans. These projects were estimated to contribute approximately 115,000 therms savings a year.

### **Local Sustainable Communities**

During 2011, SoCalGas evaluated three potential Sustainable Communities projects (Irvine Park, College of the Desert, Paradise Valley) and identified Paradise Valley (a sustainable community project in the Palm Desert area) as a suitable candidate. SoCalGas concluded a Memorandum of Understanding (MOU) with Paradise Valley and is providing design assistance through a consulting contract with KEMA, supported by Navigant Consulting on water related design issues.

The project is currently in the design phase and is expected to commence construction of homes in 2015. Several design charrettes are planned in 2012. Training will include: training modules, in-person training, a digital learning center, and related hardware for the center.

SoCalGas is currently exploring another potential sustainable community project in Playa Vista and is also in discussions with SCE for three possible joint projects where gas savings are significant. Additionally, SoCalGas has completed eight case study projects, with two additional projects in progress and are also exploring a new case study with KB Homes, which will be our first case study with a production builder. These homes generally exceed Title 24 (2005 code) by 45%, and are LEED certified.

### **Local Strategic Development and Integration**

During 2011, the team provided guidance and acted as an ongoing information source for integration activities and program innovations associated with emerging technologies, best practices, and market awareness. The team worked in partnership with, and provided information and guidance to, program sector management to ensure that interim milestones and approaches are directed toward the long-term vision.

## **Third Party Programs**

### **Steam Trap and Compressed Air Survey**

The Steam Trap and Compressed Air Survey (STACAS) Program demonstrated marked improvement during 2011 enrolling customers into the program, completing projects, and working with SoCalGas Account Executives. Since the commencement of the STACAS program, a total of 40 customer applications have been approved; 27 of which were approved during 2011. Twenty-two projects were completed and presentation meetings were held at the customers' facilities. Twenty-nine final reports were submitted to SoCalGas for approval. Seventeen SoCalGas Account Executives were involved in the program with their customers. In addition, in excess of 260 people registered for the three training seminars hosted during 2011.

### **Energy Challenger**

The Energy Challenger Program completed 1,587 Energy Challenger assessments in 2011 with small and medium C&I customers, amounting to a total of 2,801 Energy Challenger assessments during the 2010-2011 program period. This total exceeded the 2010-2011 program goal of 1,500 assessments and equates to 187% of 2010-2011 program goal. The program experienced continued rapid customer uptake during 2011 following multiple marketing and outreach activities. For customers conducting an Energy Challenger assessment, a key to the success of the program has been the short time to complete the assessment.

### **Small Industrial Facility Upgrades**

Global Energy Partners (GEP) continued to provide program deliverables as required and pursued customers through ongoing marketing efforts. However due to the limited opportunity discovered at the beginning of the year, the savings goals were not met in 2011. With the added ability to work with customers and ongoing development of relationships with customers, GEP is slated to gain significant traction and energy savings in 2012.

### **Programs for Resource Efficiency in Private Schools**

Program for Resource Efficiency in Private Schools (PREPS) did not meet its 2011 savings goal objectives due to the barriers to implementation; particularly the delayed program launch that began in late July 2011. PREPS staff had less than six months to ramp up the program with an approved list of measures before year-end. However, PREPS staff has worked closely with SoCalGas to overcome to move toward program success.

### **On Demand Efficiency**

The goal for 2011 of 370 pump installations was exceeded, with 489 installations completed during the year. One major accomplishment for the 2011 program year was the training of 21 additional plumbing companies to install the demand pumps. As of December 31, 2011 there were 375 site applications awaiting installation.

### **Home Energy Rating System Rater Training Advancement**

In 2011, there were 15 curriculums developed and 54 classes delivered. Because of aggressive production planning for the fourth quarter, the program was able to catch up and meet most of the program goals, despite canceled classes. Some opportunities were lost in because of the limited instructor availability. The program has been able to identify an additional trainer with CalCerts, which may give the program an opportunity to catch up.

### **Multifamily Home Tune-Up**

In 2011, the program successfully met all goals for the year. The program hired three full time, permanent employees based in the Santa Ana, CA area. These employees conduct the installations at the customer locations, and the in-person outreach in the area.

### **Multifamily Solar Pool Heating**

The program did not meet the savings objectives for 2011, based on the Key Performance Indicators (KPIs) that were established for the program to track the program progress and achievements.

Program termination was requested by the contractor in the fourth quarter 2011. Upon this request, SoCalGas prepared and submitted an Advice Letter. The Advice Letter 4301 was approved by the CPUC and the program was terminated on December 23, 2011.

### **Community Language Energy Outreach**

The Community Language Energy Outreach (CLEO) Program continued to establish and maintain strong relationships with community leaders, city mayors and officials, local media, faith-based organizations (FBOs) and non-profit organizations. The outreach through FBOs and local cities were especially successful and effective in 2011. The cooperative outreach effort with the organizations and cities extended CLEO to the target communities. The program was featured in Korean and Chinese news media. This helped establish a stronger recognition in the communities. The program had the most significant impact on middle to low-income customers who appeared to have stronger interests in energy efficiency tips. They also showed more interest in the incentives and services offered by CLEO than higher income customers.

### **Multifamily Direct Therm Savings**

Customers of the Direct Therm Savings Program were receptive to the new marketing strategies implemented in 2011 which informed apartment managers and owners of the availability of no cost installation of new energy-efficient devices. The new marketing campaign launched in the early part of the year included pop-up ads in an apartment search website, printing an article in an Apartment Owner's Association magazine, and sending program letters to prospective customers.

### **LivingWise™**

The LivingWise (LW) Program exceeded program energy savings and installation forecasts. LW is used at the 6<sup>th</sup> grade level in California to best align with State Learning Standards, and is offered to eligible teachers as an elective program. Teacher enrollment was very high, and overall participant program satisfaction (including parents) was excellent.

### **Manufactured Mobile Home**

The program is on track to achieve program energy savings and installation goals. The solid infrastructure, marketing strategies, and certified crews have resulted in steady production levels and strong overall program performance, which Synergy fully expects to continue throughout the 2010-2012 program cycle.

### **Gas Cooling Retrofit**

The Gas Cooling Retrofit Program did not achieve the therm savings goals primary due to a lack of identified eligible customers. The 2011 savings goals were not been met.

### **SaveGas – Hot Water Control**

The Save-Gas – Hot Water Control Program was behind in its goals for 2011, mostly due to a weak economy and low gas prices.

### **Upstream High Efficiency Gas Water Heater Rebate**

In 2011, the Upstream High Efficiency Gas Water Heater Rebate Program marketing outreach had to be stepped up to ensure that the goals were reached, despite the poor economy. Also, the program goals were reduced to a more manageable level. The program did meet the new established goals for 2011, and continues to market in an effort to exceed the goals.

### **California Sustainability Alliance**

During 2011, the California Sustainability Alliance (Alliance) redoubled its efforts in the area of local governments to take advantage of the synergistic opportunities presented through the SoCalGas local government partnerships. The partnerships opened up channels of communication to local governments striving to make advancements in energy efficiency and sustainability. Through the partnerships' focus on energy efficiency, these dialogues identified other areas where the local governments were struggling to meet broader AB 32 or climate action plan targets. The program's achievements are tracked in the monthly and quarterly reports.

## **Portfolio of the Future**

Starting in 2011, the Portfolio of the Future (PoF) added indicators aligning with the CPUC's California Long Term Energy Efficiency Strategic Plan, which includes conducting market assessments and consumer behavior studies. In addition, connections to programmatic activities have been strengthened over the past year, improving the program's ability to move promising technologies to programs.

## **PACE Energy Savings Project**

In 2011, PACE completed and surpassed a majority of its goals and assigned tasks during the year. Credit to this success can be attributed directly to PACE fielding outreach specialists. The program's use of mainstream, alternative, and ethnic mass media assisted in widening the dissemination of the benefits derived from participating in the energy saving programs of SoCalGas.

## **Program Descriptions and Strategies**

---

### **SCG3600 #Local02 - Local Whole Home Performance Narrative**

SoCalGas Whole House Performance Program, aka Energy Upgrade California Program (EUC), was implemented as a joint utility program with SCE's Comprehensive Home Performance Program as of January 1<sup>st</sup>, 2011. In July of 2011, SoCalGas launched their gas-only EUC program to all their municipal electric company territories. SoCalGas now offers their entire service territory with the EUC program. In accordance with the California Long Term Energy Efficiency Strategic Plan (CLTEESP), this program advances comprehensive energy efficiency measures, including: whole house solutions, visual monitoring and displays, performance standards, local government opportunities, and Demand Side Management (DSM) integration.

The Whole House Performance Program (WHP) delivers comprehensive improvement packages tailored to the needs of each existing home and its owner. The WHP solicits, screens, and has trained qualified residential repair and renovation and HVAC contractors to deliver program services such as performing whole-house diagnostics by proposing a comprehensive improvement package, and then completing the recommended improvements. The program also includes marketing activities to help educate customers on program services and provide additional customer leads to trained contractors. Furthermore, the program has provided consistent standards and professional identity in association with the national Home Performance with American Recovery and Reinvestment Act (ARRA) ENERGY STAR<sup>®</sup> Program. SoCalGas collaborated with ARRA recipients such as, LA County, Santa Barbara County, City of San Bernardino, and South Gate to support all efforts of marketing Energy Upgrade California.

The economy has played an important part and has been somewhat of a barrier in reaching goals for this program in 2011. The 2011 Los Angeles County Fair showcased the program with home system demonstration displays, energy assessment raffles, and educational materials. Also showcased was a renovated home model display which featured the whole house concept with interactive control board.

Several issues were encountered this year for WHP, including: work paper approval process delays; ARRA recipient data and reporting and the economic situation.

### **SCG3601 #Local05 - Local Non-Residential BID Narrative**

The mission of the SoCalGas Local Non-Residential Incentive Program (LNRP or "BID") is to provide integrated energy, resource and emissions conservation solutions to California Industry and to encourage and enable a higher degree of energy-efficiency market penetration by increasing the amount of comprehensive high efficiency measures being installed.

The SoCalGas LNRP provides incentives for energy-efficient retrofits or replacements of existing equipment at SoCalGas customer sites. Participants may be either customers or energy-

efficiency service providers acting as project sponsors for activities at customer sites. To qualify, a project must save a minimum of 1,000,000 therms saving per year. Associated energy, resource such as water, sewerage and emissions, and greenhouse gas emission savings will be considered when evaluating a project for funding. A project may consist of a single project at a single site, or may be aggregated from multiple projects belonging to a single customer, and may include a variety of measures.

The LNRP exceeded the projected 2011 savings goal by 700%. A comprehensive project initiated by SoCalGas found and saved approximately 3 million therms. Additionally, SoCalGas contacted PG&E in an attempt to provide additional value to the customer. PG&E was able to agree to enroll the customer in their SBD and provide the customer an incentive for the electric savings on the project.

### **SCG3602 #SW-AgA - Calculated Narrative**

The Agricultural Calculated Incentive Program offers incentives for customized retrofit and retro-commissioning energy efficiency projects. The program also provides comprehensive technical and design assistance.

The SoCalGas Calculated program fell short of the projected 2011 savings goal objectives due to the complex nature of the projects involved and the less than stellar economic performance of the state in general. Generally, agricultural projects have long lead times and may take several years to come from inception to fruition.

A strategy that appears to have benefitted this program was an overhaul to the overall application process allowing for a more customer-friendly processing when participating in the Agricultural Calculated Program. This strategy appears to be benefitting the SoCalGas Commercial, Industrial, and Agricultural customers, the sales force, and the program staff to have a more streamlined application process and to better document early involvement with customers. Marketing efforts were tailored to this market segment to encourage and increase customer participation.

### **SCG3603 #SW-AgB - Deemed Narrative**

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

The program fell short of the projected 2011 savings goal objectives due mainly to the less than stellar economic performance of the state in general. Customers indicated a lack of capital dollars to invest in energy efficiency projects until the economy picks up.

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/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.

### **SCG3604 #SW-AgC - Nonresidential Audits Narrative**

The Nonresidential Audits (NRA) Program includes basic audits, and integrated audits, which provide an inventory of technical project opportunities and financial analysis information.

The NRA Program focused on offering services that are bundled in an integrated fashion to serve the customer's needs and provide solutions to help the customer realize opportunities to run their operations more efficiently. The recommendation report was enhanced to capture more in-depth details of the onsite visit and to provide the customer with integrated opportunities and improvements at their facilities. There were continued developments in the development of the statewide online audit tool for the small/medium business size customer, also known as the California Integrated Customer Energy Audit Tool (ICEAT).

During 2011, the program met and exceeded the non-residential onsite audit goals for the year. Enhancements were made to the onsite audit tool to document integrated opportunities and/or improvements.

Audit tracking will follow the guidelines of the Program Performance Metrics (PPMs). The audits will be identified by North American Industry Classification System (NAICS) codes and then tracked to see how many audits were converted into rebate/incentive applications.

### **SCG3605 #SW-AgD - Pump Test & Repair Narrative**

Because pumps account for an estimated 80 percent of the electric load in California's agricultural segment, the Pump Test & Repair Program aims to overcome key informational, technical, and financial barriers to pump optimization by offering pump tests, renovation and replacement incentives, and targeted education, training and technical support for customers and pump companies.

A successful strategy to the improvement of the implementation of the program was to create a SharePoint site to track the pump test activities conducted by the Industrial Service Technicians.

In 2011, this program offering was something that the agricultural customers were already very aware of and utilized in order to identify inefficiency. There was all participation in education seminars and marketing and outreach events. SoCalGas held a workshop that focused on increasing energy efficiency with the latest technologies available to enhance well and pump performance through equipment selection and regular pump equipment evaluation, testing and maintenance.

Tracking will follow the guidelines of the PPMs. The number of pump tests will be identified and then tracked to see how many lead to repair or replacement.

## **SCG3606 #SW-AgE - Continuous Energy Improvement Narrative**

The primary goal of the Agricultural Continuous Energy Improvement (CEI) Program goes beyond achieving energy savings. Its purpose has also been to explore and create a program design that can meet the goals of transforming a customer, and to do so cost effectively. One of the earliest critical decisions made by SoCalGas and SCE in this jointly-implemented program for our overlapping territories was to combine forces and to deliver a single CEI program rather than two separate programs. As CEI encourages a holistic view of energy management, it was only natural that both types of fuel consumption be addressed together.

Another key success in implementing this program was the decision to procure outside expertise and issue a competitive solicitation seeking energy management experts (aka CEI advisors) who have worked with the utilities' account managers. Success depended on developing a trusting working relationship between the outside energy management experts and the account managers. It was understood that the utility account managers would still play an important role in the process, and the intent is to hand the engagement over to the utility account managers when the customer completes the CEI six-phase process with the CEI advisor. This transition requires a close coordination with the utility account managers throughout the process, and the objective is to involve them in key activities so that they are familiar with typical CEI practices. Thus far in the evolution of this program, this relationship has worked very effectively. The CEI advisors maintain communications with the customer and the utility account managers on a regular basis to ensure that optimum coordination is in place to facilitate energy efficiency rebate/incentive program follow-up activities.

In 2011, as the Agricultural CEI projects began moving from the assessment phase into the implementation phase, it was quite apparent that having a good program implementation plan has successfully transformed these customer engagements from the era of historical transactional, short-term project-oriented activity into long-term, forward-thinking strategic energy management planning.

By design, the CEI customers come from very different market segments; however none are directly from the agricultural segment, but some of the food processors are closely connected to the agricultural industry, though they are classified as industrial customers. The recruitment of such a diverse group of customers has been a success in accomplishing the intent of the program, which is to enhance the program's learning experience and identify the specific barriers in each market segment to provide interesting insights that should help shape future CEI offerings.

Two key value propositions behind the success of each CEI engagement include the organizational transformation and the technical and cost gains. The organizational transformation serves as a learning platform for the customers to create sustainable practices within their own organizations that could stand on their own. The Envinta One-2-Five assessment has been a particularly useful tool in identifying critical elements or barriers that need

to be addressed to successfully implement an energy management system. Also, for CEI participating customers, the utilization of benchmarking tools, such as the Environmental Protection Agency's Portfolio Manager, was especially useful in providing energy performance comparisons to similar type facilities, thus allowing a better understanding of a facility's performance overall, and helping set improvement targets.

As the CEI engagements move forward, the clear gains in the form of technical and cost improvements are expected to demonstrate not only to meet goals and expectations, but also to serve as a reinforcing reward mechanism for both the program and the customer.

The primary barriers are limited customer resources and a lack of tangible utility incentives that can provide additional resources to assist the customer in implementing the robust requirements of a successful CEI program.

Recruitment uptake increased significantly in the last quarter of 2011 for the commercial and industrial customers by identifying one of the barriers associated with helping customers to see the value propositions of CEI. The CEI management team has found it helpful in overcoming the recruitment barrier by highlighting the benefits of branding and certification programs such as Energy Star, ISO-50001 and Superior Energy Performance program.

### **SCG3607 #SW-ComA - Calculated Narrative**

The Calculated Incentives Program offers incentives for customized new construction, retrofit and retro-commissioning energy efficiency projects. Also provides comprehensive technical and design assistance.

The SoCalGas Commercial Calculated program exceeded the projected 2011 savings goal by approximately 135% due to the participation of the Partnerships.

A strategy that appears to have benefitted this program was an overhaul to the overall application process allowing for a more customer-friendly processing when participating in the Agricultural Calculated Program. This strategy appears to be benefitting the SoCalGas Commercial, Industrial, and Agricultural customers, the sales force, and the program staff to have a more streamlined application process and to better document early involvement with customers. Marketing efforts were tailored to this market segment to encourage and increase customer participation.

### **SCG3608 #SW-ComB - Deemed Narrative**

The Commercial Deemed Incentives Program offers rebates to customers in an easy to use mechanism to offset the cost of off-the-shelf energy saving equipment.

The program fell short of the projected 2011 savings goal objectives due mainly to the lack of capital dollars to invest in energy efficiency projects during this downturn in the economy. In 2011, the program supported the growth in outreach to trade allies and other delivery channels.

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 for their established business. The 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/measure.

The Deemed Incentive Program coordinated its activities with SoCalGas Account Executives and Commercial and Industrial Service Technicians so as to present energy efficiency program details to their customers. In 2011, additional training on the program was given to the Service Technicians as they are the main contact with the small and medium size customers.

The program added finned-bottom pot as a new measure in 2011. This measure was an Emerging Technology Program transferred technology.

### **SCG3609 #SW-ComC - Nonresidential Audits Narrative**

The Nonresidential Audit (NRA) Program is designed to offer Basic Audits, Integrated Audits, and Retrocommissioning (RCx) Audits, which provide an inventory of technical project opportunities and financial analysis information.

In 2011, the RCx effort to expand the standardizing of energy savings calculation methodologies for higher impact common RCx measures, thereby ensuring consistent analysis of building systems and equipment, a Commercial Building Optimization Analysis (CBOA) tool was introduced. This modified approach for qualified situations using “pre-calculated” savings to determine the energy savings for certain common RCx measures is an expansion of the Building Optimization Analysis (BOA) tool which was introduced in 2010 for smaller energy saving measures. The CBOA tool will assist in reducing overall program cost and improve the efficiency of program delivery.

The successful implementation of this new tool to simplify RCx measure calculation for some projects with higher energy savings was the result of statewide collaborative IOU participation in technical advisory group meetings which were facilitated by a California Energy Commission PIER funded project. It has streamlined the calculation review process and addresses the concerns of program service providers. The use of this tool to develop pre-calculated savings will reduce provider and administrative costs. The NRA Program focused on offering services that are bundled in an integrated fashion to serve the customer’s needs and provide solutions to help the customer realize opportunities to run their operations more efficiently. The recommendation report was enhanced to capture more in-depth details of the onsite visit and to provide the customer with integrated opportunities and improvements at their facilities.

There were continued developments in the development of the statewide online audit tool for the small/medium business size customer, also known as the California Integrated Customer Energy Audit Tool (ICEAT).

In 2011, the program met and exceeded the non-residential onsite audit goals for the year. Enhancements were made to the onsite audit tool to document integrated opportunities and/or improvements.

Audit tracking followed the guidelines of the PPMs. The non-res audits will be identified by NAICS codes and then tracked to see how many audits were converted into rebate/incentive applications.

## **SCG3610 #SW-ComD - Continuous Energy Improvement Narrative**

The primary goal of the Commercial CEI program pilot goes beyond achieving energy savings. Its purpose has also been to explore and create a program design that can meet the goals of transforming a customer, and to do so cost effectively. One of the earliest critical decisions made by SoCalGas and SCE in this jointly-implemented program for our overlapping territories was to combine forces and to deliver a single CEI program rather than two separate programs. As CEI encourages a holistic view of energy management, it was only natural that both types of fuel consumption be addressed together.

Another key success in implementing this program was the decision to procure outside expertise and issue a competitive solicitation seeking energy management experts (aka CEI advisors) who have worked with the utilities' account managers. Success depended on developing a trusting working relationship between the outside energy management experts and the account managers. It was understood that the utility account managers would still play an important role in the process, and the intent is to hand the engagement over to the utility account managers when the customer completes the CEI six-phase process with the CEI advisor. This transition requires a close coordination with the utility account managers throughout the process, and the objective is to involve them in key activities so that they are familiar with typical CEI practices. Thus far in the evolution of this program, this relationship has worked very effectively. The CEI advisors maintain communications with the customer and the utility account managers on a regular basis to ensure that optimum coordination is in place to facilitate energy efficiency rebate/incentive program follow-up activities.

In 2011, as the Commercial CEI projects began moving from the assessment phase into the implementation phase, it was quite apparent that having a good program implementation plan has successfully transformed these customer engagements from the era of historical transactional, short-term project-oriented activity into long-term, forward-thinking strategic energy management planning.

By design, the five CEI commercial customers come from very different market segments: a four-star rated hotel, a county government, a grocery chain, a K-12 private boarding school, and a national restaurant chain. The recruitment of such a diverse group of customers has been a success in accomplishing the intent of the program pilot, which is to enhance the program's learning experience and identify the specific barriers in each market segment to provide interesting insights that should help shape future CEI offerings.

Two key value propositions behind the success of each CEI engagement include the organizational transformation and the technical and cost gains. The organizational transformation serves as a learning platform for the customers to create sustainable practices within their own organizations that could stand on their own. The Envinta One-2-Five assessment has been a particularly useful tool in identifying critical elements or barriers that need to be addressed to successfully implement an energy management system. Also, for the five commercial CEI customers, the utilization of benchmarking tools such as the EPA's Portfolio Manager is especially useful in providing energy performance comparisons to similar type facilities, thus allowing a better understanding of a facility's performance overall, and helping set improvement targets.

As the CEI engagements move forward, the clear gains in the form of technical and cost improvements are expected to demonstrate not only to meet goals and expectations, but also to serve as a reinforcing reward mechanism for both the program and the customer.

The primary barriers are limited customer resources and a lack of tangible utility incentives that can provide additional resources to assist the customer in implementing the robust requirements of a successful CEI program.

Recruitment uptake increased significantly in the last quarter of 2011 by identifying one of the barriers associated with helping customers to see the value propositions of CEI. The CEI management team has found it helpful in overcoming the recruitment barrier by highlighting the benefits of branding and certification programs such as Energy Star, ISO-50001 and Superior Energy Performance program.

### **SCG3611 #SW-IndA - Calculated Narrative**

The Industrial Calculated Incentives Program offers incentives for customized retrofit and retro-commissioning energy efficiency projects. The program also provides comprehensive technical and design assistance.

The SoCalGas Industrial Calculated program exceeded the projected 2011 savings by 120%. The extensive groundwork that was laid in 2010 paid off in 2011. The ramp up time needed to coordinate and communicate the implementation of the process with both customers and the SoCalGas sales force in 2010 led to completed projects in 2011.

A strategy that appears to have benefitted this program was an overhaul to the overall application process allowing for a more customer-friendly processing when participating in the Agricultural Calculated Program. This strategy appears to be benefitting the SoCalGas Commercial, Industrial, and Agricultural customers, the sales force, and the program staff to have a more streamlined application process and to better document early involvement with customers. Marketing efforts were tailored to this market segment to encourage and increase customer participation.

## **SCG3612 #SW-IndB - Deemed Narrative**

The Industrial Deemed Incentives Program offers rebates to customers in an easy to use mechanism to offset the cost of off-the-shelf energy saving equipment.

The SoCalGas Industrial Deemed Program met projected 2011 savings goal objectives with increased activity in the steam trap replacement program.

The program successfully 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 for their established business. The program 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/measure. The program also coordinated its activities with SoCalGas Account Executives and Commercial and Industrial Service Technicians so as to present energy efficiency program details to their customers.

In 2011, additional training on the program was given to the Service Technicians as they are the main contact with the small and medium size customers.

## **SCG3613 #SW-IndC - Nonresidential Audits Narrative**

The Nonresidential Audits Program includes basic audits, integrated audits, and retro-commissioning audits (RCx), which provide an inventory of technical project opportunities and financial analysis information.

The Non-Residential Audit Program focuses on offering services that are bundled in an integrated fashion to serve the customer's needs and provide solutions to help the customer realize opportunities to run their operations more efficiently. The recommendation report was enhanced to capture more in-depth details of the onsite visit and to provide the customer with integrated opportunities and improvements at their facilities.

There were continued developments for the development of the statewide online audit tool for the small/medium business size customer (also known as the California Integrated Customer Energy Audit Tool)

Audit tracking followed the guidelines of the PPMs. The non-res audits were identified by NAICS codes and then tracked to see how many audits were converted into rebate/incentive applications.

## **SCG3614 #SW-IndD - Continuous Energy Improvement Narrative**

The primary goal of the Industrial CEI program pilot goes beyond achieving energy savings. Its purpose has also been to explore and create a program design that can meet the goals of transforming a customer, and to do so cost effectively. One of the earliest critical decisions

made by SoCalGas and SCE in this jointly-implemented program for our overlapping territories was to combine forces and to deliver a single CEI program rather than two separate programs. As CEI encourages a holistic view of energy management, it was only natural that both types of fuel consumption be addressed together.

Another key success in implementing this program was the decision to procure outside expertise and issue a competitive solicitation seeking energy management experts (aka CEI advisors) who have worked with the utilities' account managers. Success depended on developing a trusting working relationship between the outside energy management experts and the account managers. It was understood that the utility account managers would still play an important role in the process, and the intent is to hand the engagement over to the utility account managers when the customer completes the CEI six-phase process with the CEI advisor. This transition requires a close coordination with the utility account managers throughout the process, and the objective is to involve them in key activities so that they are familiar with typical CEI practices. Thus far in the evolution of this program, this relationship has worked very effectively. The CEI advisors maintain communications with the customer and the utility account managers on a regular basis to ensure that optimum coordination is in place to facilitate energy efficiency rebate/incentive program follow-up activities.

In 2011, as the Industrial CEI projects began moving from the assessment phase into the implementation phase, it was quite apparent that having a good program implementation plan has successfully transformed these customer engagements from the era of historical transactional, short-term project-oriented activity into long-term, forward-thinking strategic energy management planning.

By design, the twelve CEI industrial customers come from very different market segments: food processing, industrial laundering, smelting, carpet manufacturing, and the aerospace industry. The recruitment of such a diverse group of customers has been a success in accomplishing the intent of the program pilot, which is to enhance the program's learning experience and identify the specific barriers in each market segment to provide interesting insights that should help shape future CEI offerings.

Two key value propositions behind the success of each CEI engagement include the organizational transformation and the technical and cost gains. The organizational transformation serves as a learning platform for the customers to create sustainable practices within their own organizations that could stand on their own. The Envinta One-2-Five assessment has been a particularly useful tool in identifying critical elements or barriers that need to be addressed to successfully implement an energy management system. Also, for the twelve industrial CEI customers, the utilization of benchmarking tools is especially useful in providing energy performance comparisons to similar type industries, thus allowing a better understanding of a facility's performance overall, and helping set improvement targets.

As the CEI engagements move forward, the clear gains in the form of technical and cost improvements are expected to demonstrate not only to meet goals and expectations, but also to serve as a reinforcing reward mechanism for both the program and the customer.

The primary barriers are limited customer resources and a lack of tangible utility incentives that can provide additional resources to assist the customer in implementing the robust requirements of a successful CEI program.

Recruitment uptake increased significantly in the last quarter of 2011 by identifying one of the barriers associated with helping customers to see the value propositions of CEI. The CEI management team has found it helpful in overcoming the recruitment barrier by highlighting the benefits of branding and certification programs such as Energy Star, ISO-50001 and Superior Energy Performance program.

### **SCG3615 #SW-ResA - Multifamily EE Rebates Narrative**

The Multifamily Energy Efficiency Rebate (MFEER) Program offers prescribed rebates for energy efficient products to motivate the multifamily property owners and managers to install energy efficient products in both common and dwelling areas of multifamily complexes and common areas of mobile home parks and condominiums. An additional objective is to heighten the energy efficiency awareness of property owners/managers and tenants.

The MFEER must address the ongoing concern with “split incentives,” where the residents are not the owners of the property, so they lack incentive to improve their energy usage. Similarly, the property owners do not live on-site and pay higher utility expenses due to inefficient appliances, thus lack any incentive to upgrade. MFEER was designed to drive this customer segment toward participation by offering property owners a variety of energy efficiency measures and services.

Efforts were made to outreach to Multifamily sector in 2011 via tradeshow, events, and print ads. However, due to the high cost of measures in the MFEER program and the economy in California in 2011, there was reluctance on the part of property owners and managers to spend on improvements to their properties that they did not deem absolutely necessary. As a result, the program did not reach its goal in 2011.

In 2011, the MFEER program worked with SoCalGas Third Party Programs and the SCE MFEER program to promote gas and electric measures jointly at tradeshow. This strategy provided customers a convenient one-stop at events to obtain information regarding rebates and direct installs from offerings, as well as educating contractors and plumbers on the program measures.

Due to the high cost of measures in the MFEER program and the economy in California, there was reluctance on the part of property owners/managers to spend on improvements to their properties that they did not deem absolutely necessary. In addition, the complexity of the application proved tedious for customers to complete, especially for smaller rebates.

## **SCG3616 #SW-ResB - Home Efficiency Rebates Narrative**

The Statewide Home Energy Efficiency Rebate (HEER) program offers rebates to residential end-use customers to cover some of the incremental costs of purchasing energy efficiency Appliances. Some products are rebated through an on-line or mail-in application processes while others provide point-of-sale (POS) immediate rebates. It is a prescriptive program where rebates are offered for a specific list of energy-efficient products, this list of rebated measures may vary by utility. Finally, the statewide HEER program is traditionally supported by various marketing initiatives that may be funded by the program or other indirect impact marketing programs such as statewide ME&O program and local marketing programs.

During the first quarter of 2011, the year continued with an overall poor economy, high unemployment rate and depressed housing market were huge barriers and negative influencers to the HEER program. Despite this, the SoCalGas HEER program continued to meet and exceed both annual and program cycle goal savings objectives. Much of the continued success was due on part to the carry over effects of the Cash for Appliances program which ended in December 2010.

In 2011 PG&E, SCE, SDG&E, and SoCalGas each continued efforts to more effectively and actively engage retail partners in developing programs as well as enhance retail store presence that would increase participation and visibility at retail locations using POS system relative to 2006-2008 baseline. Residential appliance rebate offerings have become the major contenders for future POS program developments and are currently being evaluated for such an approach. This effort will ensure that participant “big-box” retailers as a percentage of all participant retailers will increase when compared to the 2006-2008 baseline. SoCalGas recruited two additional retailers to participate in the POS for 2011.

In 2011, SoCalGas also included an online rebate application as an additional tool to help customers with their rebates. SoCalGas is seeing an increase in the use of the online applications since its inception.

## **SCG3617 #SW-ResC - Home Efficiency Energy Survey Narrative**

The Home Energy Efficiency Survey (HEES) Program is a continuation of the existing HEES Program. In accordance with goals of the Strategic Plan, the HEES Program will work towards advancing whole-house energy solutions. HEES will also pursue innovative initiatives to reverse the growth of plug load energy consumption through behavioral solutions and, as warranted, Demand Side Management (DMS) integration opportunities. The HEES Program is used to reach out to customers in multiple languages through different delivery channels to perform a variety of energy surveys. The program provides survey results to enable participants to understand how their energy use varies throughout the year and how their household compares with other similar households. A multi-language approach enhances the program’s ability to reach California’s diverse cultures and provides efficiency recommendations based on a whole-house system approach.

Additionally, HEES is a resource for prompting integration and participation in other residential energy efficiency programs such as the Whole House Performance Program, the Manufactured Housing Program, the Residential Common Facilities Program, and the Single-Family & Multi-family Energy Efficiency Retrofit Programs.

In 2011, the HEES program performance was consistent with 2010. Online and mail-in participation was steady from month to month, with outreach and specific campaigns to green schools and other targeted marketing providing much of the success. HEES was promoted via the LA County Fair and other outreach efforts throughout SoCalGas territory. E-blasts were sent from SoCalGas to customers urging them to take the online survey, and the third party program, PACE, contributed significantly to the use of in-language surveys.

SoCalGas HEES achievements far surpassed its goals.

### **SCG3618 #SW-ResD - Prescriptive Whole House Retrofit Narrative**

The Prescriptive Whole House Retrofit sub-program (PWHRP) , also known as Energy Upgrade California (EUC) is a statewide program with the four California Investor Owned Utilities (IOUs). In 2011, this program was launched in conjunction with the Whole House Performance Program (WHP) on January 1, 2011. SoCalGas Whole House Performance Program was implemented as a joint utility program with SCE's CHPP. In July of 2011, SoCalGas launched their gas-only EUC program to all their municipal electric company territories. SoCalGas now offers the EUC Program to their entire service territory. In accordance with the CLTEESP, this program advances comprehensive energy efficiency measures, including: whole house solutions, visual monitoring and displays, performance standards, local government opportunities, and DSM integration.

The program delivers comprehensive improvement packages tailored to the needs of each existing home and its owner. SoCalGas solicits, screens, and has trained qualified residential repair and renovation and HVAC contractors to deliver program services such as performing whole-house diagnostics by proposing a comprehensive improvement package, and then completing the recommended improvements. The program also includes marketing activities to help educate customers on program services and provide additional customer leads to trained contractors. Furthermore, the program has provided consistent standards and professional identity in association with the national Home Performance with American Recovery and Reinvestment Act (ARRA) ENERGY STAR® program. SoCalGas collaborated with ARRA recipients such as, LA County, Santa Barbara County, City of San Bernardino, and South Gate to support all efforts of marketing Energy Upgrade California.

The 2011 Los Angeles County Fair showcased the program with home system demonstration displays, energy assessment raffles, and educational materials. Also showcased was a renovated home model display which featured the whole house concept with interactive control board.

Several issues were encountered this year for WHP, including: work paper approval process delays; ARRA recipient data and reporting and the economic situation. The economy has played an important part and has been somewhat of a barrier in reaching goals for this program in 2011.

### **SCG3619 #L-InstP01 - CA Dept of Corrections Partnership Narrative**

The California Department of Corrections (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.

Regular Management Team meetings (monthly) and Executive Team meetings (quarterly) with the program administrator have been key to identifying and managing projects, and to proactively address any challenges the program may have faced.

There were project funding challenges due to the state budget cuts, however, that did not affect the program in 2011. The program's savings goals and incentive funding are in commercial core programs. The CDCR Partnership achieved 214% of the therm goal and 93% of the incentive goal statewide for 2011.

### **SCG3620 #L-InstP02 - CA Community College Partnership Narrative**

The California Community Colleges (CCC)/IOU Energy Efficiency Partnership has been a successful collaboration between the CCC and the four IOUs. The CCC is a two-year public institution of higher education that is composed of 110 colleges statewide and organized into 72 self-governing Districts. It serves more than 2.6 million students coming from a wide range of cultural and economic backgrounds, and represents the largest system of higher education in the world. SoCalGas alongside the other IOUs (PG&E, SDG&E and SCE), will continue this collaboration, which started with the 2006-08 CCC/IOU Energy Efficiency Partnership, to share best practices and implement energy efficiency programs and projects for immediate and long-term energy savings and peak demand reduction.

This partnership provides a unique opportunity to deliver cost effective energy savings while leveraging the CCC's local and statewide new construction bond funding. The 2010-2012 CCC/IOU Partnership will expand its efforts for the implementation of energy-efficient Retrofits, New Construction Design Assistance facilitated by the Savings By Design program, Demand Response, RCx, and Monitoring-Based Commissioning (MBCx) projects. The program will also focus its efforts on training and education, which will expand existing education programs by training faculty and staff in best practices on energy efficient technology implementation and energy management.

Developments in 2011 included the establishing of Campus Forums, hosted quarterly at campuses across the State. This forum serves as a venue for districts to share successes and strategies for overcoming obstacles. The Management Team also began working with CCC

Board of Governor Member Henry A. J. Ramos to build greater recognition of the program's achievements both in and out of the community college system.

The most common and inhibitive barrier was lack of funding at the campuses to develop and implement projects. Even projects with short payback periods or those financed through OBF needed upfront funding that was difficult to allocate. Additionally, community colleges lacked resources in their facilities and maintenance departments that were devoted full-time to energy management.

### **SCG3621 #L-InstP03 - UC/CSU/IOU Partnership Narrative**

The University of California/California State University/Investor Owned Utility (UC/CSU/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 incentive funding of approximately \$41M for the 2010-12 program cycle will continue the permanent 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. The Management Team meets every three weeks to conduct business at the management level, whereas the Executive Team meets quarterly to discuss overall program status and policy issues. The Partnership also has a Training and Education Team that organizes various energy efficiency trainings targeted to university campuses. Because University of California Office of the President and California State University Chancellor's Office each has members on both the Management and Executive Team, the campuses are well supported in their efforts to implement energy efficiency projects. This top-down communication approach has been successful in marketing program opportunities.

Members of the management team also meet on a regular basis to document implementation progress, identify and resolve issues, and drive project completion. The Program Administrator actively tracks project savings and schedule data in online tracking tool, and creates regular reports to show overall status of program or forecasts relative to goals.

The most common and inhibitive barrier is lack of funding at the campuses to develop and implement projects. Even projects with short payback periods or those financed through OBF still need upfront funding that is difficult to allocate within state-funded institutions.

In 2011, the Program Administrator worked more closely with commissioning agents on MBCx projects to resolve issues and communicate to stakeholders any expected changes in energy savings throughout the project. Additionally, the respective university system offices and the Program Administrator worked with individual campuses to put together preliminary projects lists to forecast and plan for 2012 achievements.

The UC/CSU/IOU partnership program became non-resource in the current program cycle. The program's savings goals and incentive funding are in commercial core programs. As of 12/31/10,

completed projects totaled over 2.3 million therms (~83% 2011 Program goal), and nearly \$13 million in incentive funds (~86% of 2011 Program budget).

### **SCG3622 #L-InstP04 - State of California /IOU Partnership Narrative**

SoCalGas and the State of California (SOC) are collaborating to continue the State of California/IOU Energy Efficiency Partnership program for the 2010-2012 program cycle. This program's goals include sharing energy efficiency best practices and implementing projects to capture immediate and long-term energy savings and to produce mechanisms for peak demand reduction.

The program will assist the State's agencies to reduce the amount of energy they purchase from the grid by 20 percent by the year 2015, as required by the Governor's Executive Order S-20-04 (i.e. Green Building Initiative (GBI)). Like all Executive Orders, the GBI is an unfunded mandate that requires State agencies to support the Governor's environmental agenda.

Accompanying the GBI is the Green Building Action Plan (GBAP), which contains detailed instructions on how to achieve the mandated energy savings and reduction in demand. In addition to requiring all new construction and large renovations to meet Leadership in Energy and Environmental Design (LEED) silver certification requirements, the GBAP directs the state to benchmark, retro-commission, and retrofit its existing building stock.

The program did not meet its 2011 goals. American Recovery and Reinvestment Act (ARRA) funding was available and used by the Partnership to get a number of projects off the ground. However, the small scale of some of the projects inhibited their approval by the ARRA fund allotment project approval process from the State (an internal prioritization of ARRA funds). Addressing the funding issues of the SOC, finding engineering service companies willing to float the upfront costs of expensive gas projects, as well as long pay-back periods for the projects prevented the program from performing to goals.

Communicating/coordinating directly with the Account Executives while also coordinating with the other IOU's from both a top-down and bottom-up approach worked well to identify potential projects and customer needs.

The most common and inhibitive barrier was lack of funding at the State level to develop and implement projects. Projects financed through OBF still needed upfront funding that was difficult to allocate. Additionally, many gas projects were not economically feasible at this time.

### **SCG3623 #SW-ME&OB - SW Marketing, E&O FYP Narrative**

The purpose of statewide Marketing, Education, and Outreach (ME&O) was to increase utility consumer awareness and participation in cost-effective energy saving activities offered by the utilities. Additionally, the program promoted behavior changes resulting in energy management efforts that save energy and reduce greenhouse gas emissions, executed in coordination with demand response and renewable self-generation options. To be successful, the ME&O would move consumers through a transitional process from awareness and knowledge of energy efficiency to action and advocacy.

An Assigned Commissioner Ruling Regarding the Statewide ME&O Program was issued October 13, 2011, which officially suspended all ME&O activities until Commission Staff could provide Commissioner Ferron recommendations on how to re-strategize the program. Parties were asked to provide their recommendations about program design, which each utility did. No additional program activities took place between September and December 2011.

On March 20, 2012 the Proposed Decision Providing Guidance on 2013-2014 Energy Efficiency Portfolios and 2012 Marketing, Education and Outreach directed utilities to abandon the Engage 360 brand and replace it with the Energy Upgrade California (EUC). It is not anticipated that any activities related to Engage 360 will occur in 2012 aside from sun setting the brand. Statewide ME&O activities are expected to revolve around maintaining the EUC brand and strategic planning activities intended to expand EUC to transition to a brand that encompasses all demand side management products and programs.

### **SCG3624 #SW-ETA - Assessments Narrative**

The statewide Emerging Technologies Program (ETP) is designed to support increased energy efficiency market demand and technology supply (the term supply encompassing breadth, depth, and efficacy of product offerings) by contributing to development and deployment of new and under-utilized measures—including technologies, practices, and tools—and by facilitating their adoption as measures supporting California’s aggressive energy and demand savings goals.

ET programs include the following elements or sub-programs: Technology Assessments, Demonstration Showcases, Scaled Field Placements, Market & Behavioral Studies, Technology Development Support, and Technology Resource Incubation & Outreach.

#### Strategies implemented in 2011:

- Accelerated the introduction of EE technologies and analysis tools not widely adopted in various California markets.
- Verified the performance of the technologies in the laboratory under control conditions, as well as in the field.
- Developed computer simulation tools to calculate the energy savings for various energy measures.
- Transferred assessment results to EE Programs for use in creating energy measures.
- Transferred acquired knowledge to customers as well as engineering and design communities.
- Conducted workshops for both internal and external customers.
- Coordinated with other utilities through the Emerging Technology Coordinating Council.
- Developed a statewide database for tracking ET projects.
- Developed an Operations and Procedures Guide.
- Kicked off the first ET Open Forum to solicit technologies from the technology development community.

### **Technology Assessments**

Through the Technology Assessment element of ETP, energy efficient measures that are new to the market (or underutilized for a given application) are evaluated for performance claims and overall effectiveness in reducing energy consumption and peak demand. A key objective of these assessments is the adoption of new measures into SoCalGas-EE portfolio.

#### **Strategies Implemented in 2011**

- Collaborated with many IOU and non-IOU partners and scanned a wide variety of sources to identify suitable assessment candidates.
- Used the statewide database to report project activities on a quarterly basis.
- Actively engaged the EE Program and other Program stakeholders.
  - o Transferred acquired knowledge to customers as well as engineering and design communities.
  - o Transferred assessment results to Energy Efficiency Programs with the assisting of Measure developer for adoption as EE measures.
- Provided information to internal stakeholders from assessments that can help measure developer and engineering services h/she developed new measures or revise/integrate existing measures.
- Used a screening and scoring system to identify the most appropriate TA candidates.
- Produced reports describing TA results, conclusions, and recommendations.

### **Scaled Field Placements**

The Scaled Field Placement (SFP) Projects consist of placing a measure at a number of customer sites as a key step to gain market traction and possibly gain market feedback. Typically, these measures have already undergone an assessment or similar evaluation to reduce risk of failure. Monitoring activities on each scaled field placement will be determined as appropriate.

#### **Strategies Implemented in 2011**

- Continued scan, screen, and prioritize a wide variety of sources and coordinated closely with EE Programs for measures suitable for SFPs.
- Began developing a strategic marketing plan to promote project exposure, stakeholder awareness, and public information dissemination.
- Completed a scaled field placement project in residential segment

### **Demonstration Showcases**

The Demonstration Showcase element is designed to provide key stakeholders the opportunity to "kick the tires" on proven combinations of measures that advance ZNE goals. Demonstration Showcases are awareness-generating projects that expose measures on a systems level to large groups of customers, whether it is the general public or a targeted audience, in real-world settings, thus creating broad public and technical community exposure and increased market knowledge. These potentially large-scale projects expose measures to various stakeholders using real-world applications and installations. Key attributes of a DS are that they are open to the stakeholders and they highlight a systems approach rather than an individual approach.

#### **Strategies Implemented in 2011**

- Continued scan, screen, and prioritize a wide variety of sources and coordinated closely with EE Programs for measures suitable for DS.
- Began developing a strategic marketing plan to promote project exposure, stakeholder awareness, and public information dissemination.

### **Market and Behavioral Studies**

The Market and Behavioral Studies Program is designed to perform targeted research on customer behavior, decision making, and market behavior to gain a qualitative and quantitative understanding of customer perceptions, customer acceptance of new measures, and market readiness and potential for new measures.

#### **Strategies Implemented in 2011**

- Performed primary or secondary research, as necessary, to gain market insight.
- Coordinated with the statewide partnership.

### **Technology Development Support**

TDS is designed to allow the ETP the opportunity to lend assistance to private industry in the development or improvement of technologies. Although product development is the domain of private industry, there are opportunities where IOUs are well qualified (or in a strong position) to undertake targeted, cost-effective activities that provide value in support of private industry product development efforts. This support increases market readiness, decreases innovator uncertainties, and allows the ETP to have input. ETP looks for targeted opportunities to support EE product development. Product development is the process of taking an early-stage technology, or concept, and transforming it into a saleable product.

#### **Strategies Implemented in 2011**

- Reviewed TAs and other element projects.
- Stayed abreast with industry and manufacturers on new product development.

- Collaborated with industry directly and through partners, such as the Western Cooling Efficiency Center (WCEC) and California Energy Commission-Pier to provide targeted support for technology development.

### **Business Incubation Support**

The Technology Resource Incubator Outreach (TRIO) Program is a statewide program that provides support and networking for EE and demand response entrepreneurs, investors, and universities with the goal of providing participants the necessary perspective and tools to work with IOUs and ultimately introduce new EE measures to the marketplace. TRIO helps to accelerate the successful development of technologies through an array of engineering support, resources, and services, all of which are developed and orchestrated by TRIO and offered both through TRIO and its network of contacts.

### **Strategies Implemented in 2011**

- Collaborated and educated innovators from universities and other research institutions.
- Collaborated with the ETCC and IOUs on various activities, including Cleantech Open and CleantechLA.
- Developed a screening tool for entrepreneurs to preliminarily assess the viability of their technology.
- Continued on-going business relationships with investors who were interested in funding cost-effective EE measures.
- Provided workshops on “how to do business with utilities.” These workshops helped to educate the investor and technology communities on the requirements necessary to do business with utilities.
- Provided an annual venue to highlight TRIO technologies at the ETCC Summit.
- Issued a new competitive request for proposal to encourage innovative technologies or approaches to be implemented as a new third party program.
- Provided proposal and technical training to 138 attendees

## **SCG3625 #SW-NCNR - NRNC Savings By Design Narrative**

Savings By Design (SBD) is an energy efficiency program developed for the nonresidential new construction industry. Since 1999, SBD has provided statewide consistency, program stability, and energy savings to California’s IOU customers. SBD seeks to protect and preserve natural resources by advancing the design and construction of sustainable communities and promoting green building practices. The program is designed to overcome customer and market barriers to designing and building high performance facilities.

SoCalGas started implementing the program in 2010, incorporating 2008 code changes from a more stringent version of Title 24. Incentive levels were modified (\$/kWh for lighting, HVAC, etc) to match that of the statewide customized offering; the incentive cap was increased to \$500,000. A \$5,000 stipend was also offered for design teams to hold design charrettes (or workshops) to encourage deeper energy reductions and integrated design approaches.

Since natural gas savings from commercial and industrial building projects are extremely limited, the SBD program at SoCalGas needs innovative approaches. The program utilized the following cost-effective approaches towards achieving its energy savings goals:

- SoCalGas completed an inter-utility agreement with SCE for purchasing therm savings at a pre-determined rate for projects managed by SCE. SoCalGas worked with SCE on 20 such projects and secured energy savings of about 100,000 therms. Although no formal agreement exists between SoCalGas and PG&E, SoCalGas continued to work cooperatively with PG&E to evaluate projects as they are enrolled.
- A separate agreement was executed for projects routed through the Partnership Programs. SoCalGas established cooperative relationship with its Partnership Programs group to assist in projects arising from their participating government entities. As the Partnership group identified projects within the participating state and local government facilities, SBD provides leadership and manages the EE aspects (therm savings only) of those projects.
- Municipal utilities (munis) within SoCalGas service territory are tasked with EE goals but they are severely resource constrained. SoCalGas proposed running the SBD program in their service territories as a third party program. SoCalGas would promote the SBD program within the design community and to building owners in each muni. SoCalGas would also sign incentive contracts with building owners within each muni and provide incentives for kWh, kW and therms. Upon completion and inspection of these projects, SoCalGas would claim the gas therm savings in their overall EE portfolio and each muni would claim the kWh and kW savings towards their EE goals. The muni would then reimburse SoCalGas for the incentives paid out for kWh and kW savings and a small administrative fee for program administration. SoCalGas continues to pursue this approach with LADWP, Imperial Irrigation District and other munis, albeit with limited success.

In 2011, SoCalGas was able to forge a successful working relationship with the LADWP. Collaborative approaches relevant to various utility programs including SBD and CAHP were discussed with the DWP personnel at various levels. The Los Angeles Business Council proved to be an excellent conduit for facilitating the relationships. Opportunities for joint implementation of SBD, along with CAHP (innovative water saving measures such as thermostatic valves) were actively pursued.

### **SCG3626 #SW-NCResA - RNC and #SW-NCResA-Energy Star Manufactured Homes Narratives**

The California Advanced Homes Program (CAHP) is part of the Statewide Residential New Construction program offering. CAHP encourages single and multi-family builders of all production volumes to construct homes that exceed California's Title 24 energy efficiency standards by a minimum of 15 percent. Through this program, multi-family and single-family projects are approached identically for program purposes except where explicitly noted.

The CAHP program continued implementation in 2011, incorporating code changes from a new, more stringent version of Title 24. The program features a customized incentive structure on a sliding scale, differing significantly from the deemed incentive structure of the previous program cycles. Another key feature is the payment of incentives based on actual orientation of the home. Encouraging builders to go beyond energy savings, the program offers bonus incentives for ENERGYSTAR homes, compact sizing, green certifications, etc. Significant incentives are offered for homes participating in NSHP Tier 2 (\$1000 for single family, \$200 for multifamily) and for peak kW reductions. All these program improvements were implemented in the SoCalGas service territory, with statewide consistency. A design team incentive (up to \$5,000) was also incorporated, encouraging integrated design practices. SoCalGas also concluded an energy swap agreement with the SCE and PG&E, whereby the utilities reimburse each other for electric and gas savings.

Working closely with the other IOUs, SoCalGas played a key role in refining the communication vehicles developed for the program in 2010. Several revisions to the Handbook were implemented in 2011. Several Title 24 training sessions for external participants and internal training classes were conducted in the utility's service territory, in addition to customized presentations for the builder community.

Registry issues continued to affect the smooth functioning of the program. CHEERS remained closed for the utility side of '08 code projects. CalCERTS became the only functioning registry, and SoCalGas played a key role in working through the third party verification process. Several programming changes were implemented by CalCERTS and SoCalGas provided the much needed assistance and project know-how. These changes caused significant slow-down in project processing and verifications. SoCalGas managed through this period of uncertainty with innovative work around solutions.

In spite of the continuing slump in new construction activity, project enrollments continued at a brisk pace. By midyear, the program incentives were over-subscribed. In accordance with the energy savings sharing agreement with SCE, SoCalGas referred several projects from the joint service territories to SCE for enrollment and processing, but continued to enroll projects in the municipal territories. By December 2011, the program had enrolled 10,500 units. CAHP met the annual therm savings goal in 2011. The program also continued to experience significant cost savings from partnering on CAHP program support materials, trade advertising, sponsorships, shows/events, etc.

Additionally, SoCalGas has completed eight case study projects, with two additional projects in progress. The program is also exploring a new case study with KB Homes, which will be our first case study with a production builder. These homes generally exceed Title 24 (2005 code) by 45%, and are LEED certified.

The ENERGY STAR® Manufactured Homes Program (ESMH) is part of the Statewide Residential New Construction (RNC) program offering. ESMH addresses new factory-built housing not covered under the State's Title 24 energy codes.

ESMH was introduced in the 2010-2012 program cycle and was in its start-up phase during 2010. SoCalGas efforts included contacting local retailers, other IOUs, national associations, and researching ENERGY STAR® and Housing and Urban Development (HUD) requirements. Successful strategies for developing the program included coordinating with the other IOUs and negotiating with the Systems Building Research Alliance (SBRA) to incorporate nationally recognized best-practices. SoCalGas developed its manufactured homes program in close coordination with SCE to ensure success and minimize customer confusion in overlapping service territories.

During 2011, SoCalGas efforts included coordinating with other IOUs, developing a relationship with the California Manufactured Housing Institute, the main industry organization in California, other associations, and developing a practical program to rollout. Steps to developing the program included coordinating with the other IOUs, particularly SDG&E at the early part of the year and SCE during the second half. SoCalGas participated in the rollout of the SDG&E program with the intention of modeling the SoCalGas program in a similar format. Work papers were developed, and submitted substantiating the energy savings from Energy Star Manufactured Homes over HUD home. A term purchasing memo of understanding was put in place with SCE.

In mid/late 2011, the program development plan was modified to more fully utilize the expertise and network of Systems Building Research Alliance (SBRA) to more effectively implement the program. The SoCalGas strategy changed from relying primarily on the projects SCE enrolled, and purchasing their therms, to a more proactive relationship with SBRA coordinating a joint program with SCE. This was done to better ensure success, allow for more participation, and minimize customer confusion in overlapping and non-overlapping service territories. To that end, a contract was developed and signed with SBRA in 2011 to facilitate this revised program approach. A modified agreement between SCE and SBRA to support this joint program approach was also negotiated.

This program does not currently have specific energy savings goals. As such, goals will be created as the workpaper is completed and the local market and anticipated volume are better understood.

## **SCG3627 #SW-WE&TA - Strategic Planning & Implementation Narrative**

This Workforce, Education & Training (WE&T) Program involves management and execution of several strategic statewide planning tasks identified in the Strategic Plan: a) formation of a Statewide WE&T Task Force, b) conducting a Statewide Needs Assessment study, c) facilitate Annual WE&T Public Meetings, and d) create a WE&T-specific web portal.

The inaugural WE&T Taskforce meeting was held January 28, 2009. The completion and release of the California Investor-owned Utilities' (IOUs) that addressed workforce strategies needed to achieve the state's ambitious energy efficiency goals was a priority for the IOU WE&T staffs in 2011. The final study was posted on March 17, 2011 to the Energy Efficiency

Web-portal, [www.engage360.com](http://www.engage360.com). A WE&T public workshop, serving the role of a WE&T Taskforce meeting occurred on April 6<sup>th</sup> 2011 when results and recommendations from the WE&T Needs Assessment study were presented for public discussion and comment. Public response to WE&T related recommendations from the study was the primary agenda of the workshop.

IOUs submitted an Advice Letter that outlined general plans for implementation of a Sector Strategies approach for evolving IOU WE&T Training and curriculum development through expanded collaboration. The AL was approved in October 2011 at which time the plan outlined in the AL was formally initiated. Specific comments and proposals on recommendations were provided in the respective WE&T Centergies and WE&T Connections sections of this Advice Filing.

In the AL, IOUs proposed to use the WE&T Taskforce meetings to evaluate existing cross-cutting training implementations across industry trade, educational, public agency and community-based sectors. The taskforce was also to be used to share with stakeholders, IOU progress with collaborative training relationships, as well as IOU inter-organizational departments.

SoCalGas established an internal sector strategies launch team late in 2011. The team was formed by WE&T leadership and consists of representatives from different energy efficiency program areas. The team was educated on the sector strategies concept, examples and the IOU AL commitments. The first meeting was used to identify common goals and objectives that could lead to ideas for creating workforce capacity and add incremental energy savings to programs.

SoCalGas began exploring expanded ways for developing training curriculum and implementing courses for the WE&T Centergies and WE&T Connections subprograms in 2011, to more effectively support increasing workforce interests, demanded skills and accelerate training capacity in growth areas of the energy efficiency industry sector. IOUs continued collaboration with secondary and post-secondary education to strengthen linkages and create more transparent pathways into an energy efficiency career.

## **SCG3628 #SW-WE&TB - WE&T Centers Narrative**

This subprogram is organized around market sectors and cross-cutting segments to facilitate workforce education and training. Energy Centers represent the largest component of this subprogram. Included in this program are the Energy Center and Food Service Center activities. Centergies activities allow potential green workforce candidates to explore energy efficiency, integrated demand-side management technologies, and resource management techniques.

In response to a recommendation on the 2006-2008 Statewide Program in 2010, the statewide team pursued consistency in registration and data tracking, adoption of adult learning principles into the training curriculum, and web-based training was introduced. SoCalGas began making

changes to its registration system to capture additional participant data that could help track training impacts.

During 2011, the SoCalGas WE&T Centergies subprogram conducted 221 trainings/seminars, 40 outreach consultations, and 218 equipment demonstration tours. While objectives such as helping to improve the quality and qualifications of the green energy workforce, and increasing new pathways into energy efficiency careers have not changed, the state budget, national economic crises, and labor market instability led to challenges beyond the direct control of the IOUs. These factors created difficulties in implementing a sustainable, comprehensive, and transformative program.

SoCalGas partnered with LA Trade Tech Community College programs involving HVAC and steam trade associations, including Local 501 Operating Engineers Joint Apprenticeship Program to provide supplemental trade training. SoCalGas continues to work with IHACI to develop HVAC training that meets California Quality Installation and Quality Maintenance requirements. In addition, WE&T continues to collaborate with the CA Concrete Producers and the CA Metals Coalition to host annual trade meetings and to discuss development of future curriculums.

SoCalGas offered training seminars to assist attendees in obtaining various certifications including North American Technician Excellence (NATE), Department of Energy (DOE) Specific Specialist Qualifications (including steam, process heating & compressed air), Green Building Professional and Green Associate Certification, Building Operators Certification (BOC), LA Steam License Engineer Certification preparatory training, Certified Energy Manager, and Infrared Camera certification.

SoCalGas continued to be proactive in restructuring, modifying and developing existing seminars and courses to meet changing Codes, Standards, Emerging Technologies, and Certification Requirements. The SoCalGas Energy Resource Center was upgraded to accommodate teleconferenced training sessions, seminars and workshops. In addition, SoCalGas is assessing approaches to delivering web-based training content now that it has the audio-visual capacity to support.

SoCalGas contacts the various agencies including the LA Chamber of Commerce, Workforce Investment Boards (WIB) and the local Job Corps – on curricula and training targeting different classifications of disadvantaged workers. The SoCalGas Energy Resource Center recently completed a landscaping project that offered short-term, hands-on training to students of a regional Jobs Corp agency.

SoCalGas continued relationships with the government agencies, national and local training partners, as well as local public workforce agencies, IOUs worked towards forming training collaboration with post-secondary educational institutions. In addition, BOC Training Partnership represented an important relationship for operators to earn certification by attending training and completing project assignments in their facilities. In 2011, SoCalGas completed 3 courses for its level 1 BOC training series and 6 courses for its level 2 BOC Series.

Other strategic shifts included more leveraging of Emerging Technology, Codes & Standards and Research Development and Demonstration. The SoCalGas Energy Resource Center hosted demonstrations of live thermal solar technologies. Although WE&T Programs claimed no quantitative energy savings directly, the Food Service Centers served an important role in educating customers about rebate programs and qualifying equipment options. SoCalGas WE&T in partnership with PG&E will continue to work through the San Luis Obispo County Energy Watch Partnership to co-sponsor code compliance training and promotion of local energy efficiency training programs in support of the California Long Term Energy Efficiency Strategic Plan (CLTEESP), and to increase the expertise of building officials, contractors and design professionals.

The IOUs worked with the Energy Division throughout 2011 to clarify PPMs for the WE&T Centergies programs. Specifically, the statewide WE&T team proposed several variations of how to track and measure IDSM course inventory. Each of the options provided varying levels of IDSM integration into curriculum, but also offered IOUs flexibility in meeting the objective and intent of the PPM. The WE&T Programs continued to solicit evaluation on its courses and programs, and feedback seemed to reiterate that the offerings are giving participants what is of most interest to them – advanced skills, certification and qualifications for participating in IOU energy efficiency programs.

### **SCG3629 #SW-WE&TC - WE&T Connections Narrative**

The WE&T Connections Subprogram focuses on energy efficiency curriculum and related activities that inspire interest in energy careers, new and emerging technology, as well as skills to advance the energy initiatives and goals within the K-12 educational sector and provide information to increase awareness of introductory-level community-based training efforts.

The Green Campus program which is currently funded by the IOUs at 16 universities and colleges with nearly 100 participating interns, engages students in building pathways into green careers.

PEAK is a K-12 student training program providing education curriculum on the science of energy use, and how to manage energy use. The existing curriculum materials were recently revised to include the green career awareness and exploration as well as the impacts of energy generation and demand response on the environment including green house gas emissions. PEAK is also focused on recruitment efforts in minority, low-income Title I school districts. The IOUs are working together to develop high school level student connections and also learning more about how social media and related technologies can assist in tracking student matriculation into energy careers. While objectives have not changed, the state budget, national economic crises, and labor market instability have created challenges beyond the direct control of the IOUs, all of which have created difficulties in developing sustainable, comprehensive and transformative program implementations.

During 2011, the program achieved its deliverable of having 3-6 paid interns working at each campus per school semester/quarter. It also exceeded its deliverable of outreaching to an average of 750 interns and other students per semester/quarter.

While objectives such as helping to improve the quality and qualifications of the green energy workforce, and increase new pathways into energy efficiency careers have not changed, the state budget, national economic crises, and labor market instability created challenges beyond the direct control of the IOUs. These factors caused difficulties in implementing sustainable, comprehensive, and transformative programs.

SoCalGas is collaborating with El Camino Community College (ECCC) to provide speakers to enhance education awareness of disadvantaged students in the Compton area on Environmental Sciences classes, with green career exploration in mind. ECCC is assisting in providing Environmental Courses at targeted high schools. The targeted audience is Grades 9 – 12. SoCalGas continues to partner with the statewide team on the Green Campus Initiative.

SoCalGas continued its partnership with outside stakeholders such as; El Camino Community College Summer Utilities Responsive Training (SERT), an intense 10 week summer program for disadvantaged students to develop their skills designated toward a career in the Energy Efficiency applications. The Science Technology Engineering and Math (STEM) program in San Bernardino County is a three-day program geared as a train-the-trainer program to educate and increase student awareness and provide fundamental education that will enhance energy efficient careers.

Though there were no plans to shift attention from K-8 WE&T implementation, the statewide IOUs worked together to develop high school-level student connections. By creating a better connection at the secondary level of the education system, the IOUs should be able to promote energy and EE as career options for students uncertain of their futures. The IOUs planned to leverage its current WE&T Connection strategies to design and develop ways to support the statewide Green Career Academies.

The program implementers tracked participation at the school level in the current statewide K-8 and post-secondary targeted programs, while planning more specific reporting and measuring of Title I school inclusion. The IOUs also learned more about how social media can assist in tracking student matriculation into energy careers.

## **SCG3630 #LGovP01 - LA County IOU Partnership Narrative**

The 2010-2012 SCE/SoCalGas/County of Los Angeles Partnership is a continuation of the existing, successful 2004-05, and 2006 -08 programs with SCE and SoCalGas. The 2010-2012 Partnership will build on the lessons learned and will continue to focus on identifying energy efficiency activities in county facilities in support of the recently adopted county of Los Angeles Energy and Environmental Plan.

The Partnership program will support the energy efficiency components of the Energy and Environmental Plan initiatives by identifying projects and strategies to reach the 38 different county departments that the Internal Services Department (ISD) serves. In addition, there are departments and public agencies affiliated with the county (e.g., Public Housing, Sanitation Districts, School Districts, County Metro Transit Authority, Waterworks and Wastewater utilities) that have previously not participated in past Partnership programs. By tailoring outreach and implementing innovative ways to participate (emerging technologies, integration with state-wide pilots, e.g. water districts, and flexible funding) the Partnership will increase energy efficiency participation in these Los Angeles County departments.

The partnership continues to build on the success funneling projects to SoCalGas Core programs. Several RCx projects are currently underway in County Facilities. In addition, the Partnership continued meetings with departments outside of the Internal Services Department, in order to promote additional energy savings opportunities. The program staff also supported the launch of LA County Energy Upgrade California (EUCa) which provides incentives which compliment the IOU incentives.

### **SCG3631 #LGovP02 - Kern County Energy Watch Partnership Narrative**

The Kern County Energy Watch Partnership is a continuation of the partnership among the City of Bakersfield, Kern County, SCE, SoCalGas, and PG&E which will be expanded to include the cities of Delano, McFarland, Tehachapi, and California City, and the implementing partner: The Kern County Council of Governments (KCOG).

The Partnership builds upon the success of the Kern County Energy Watch Partnership. The 2010-2012 partnership improves SoCalGas current local government partnering strategy by establishing a disciplined, concentrated approach to create consistency in program offerings and improve clarity and ease of participation in community partnerships. The Partnership will develop new partners from the additional four incorporated cities and extend the program's reach into the unincorporated communities within Kern County. The Partnership's comprehensive portfolio of activities is designed to seek innovative approaches to energy efficiency by implementing best practices for municipalities and by establishing a wave of energy efficiency activities through focused educational and outreach events. This will also increase effective delivery of technical and financial energy services to residents and businesses.

Strategic plan support included support for code compliance, reach codes, guiding documents, community financing, and peer to peer. Based on the needs of the partners, they selected from the following strategic planning options: create and adopt energy action plans; perform greenhouse gas inventory and adopt climate action plans; increase compliance with EE building codes; and educate local officials on EE codes, standards, programs, and ordinances. Work towards these goals was initiated and expected to be completed by the end of the program cycle.

Core program coordination included outreach and education, residential and small business direct install, third-party program coordination, and retrofits for just-above LIEE qualified

customers. In support of these efforts, a marketing committee was formed and created promotional materials to disseminate information. The partnership also hosted guest speakers and provided multiple training opportunities on topics a variety of EE topics. In addition, a marketing campaign, “Take 5 for Energy Savings” was created to conduct outreach within local government operations.

The Kern County Energy Watch Partnership continues to make progress completing strategic plan support objectives. Areas of focus included assistance for code compliance, reach codes, guiding documents, community financing, and peer to peer. SoCalGas has also been assisting the County of Kern, and Cities to move forward with EE projects.

### **SCG3632 #LGovP03 - Riverside County Partnership Narrative**

SoCalGas will join with SCE and the County of Riverside (County) in implementing the Riverside County/SCE/SoCalGas Energy Efficiency Partnership Program for the 2010-2012 program years. SoCalGas will bring additional resources to the Partnership to expand the County’s efforts to enhance electric and gas energy efficiency projects through state-of-the-art new construction and retrofits of existing buildings. This partnership interlocks with the goals, objectives, and strategies articulated in the CEESP.

This is a collaborative effort between utility program managers, county facility managers and other internal organizations. The partnership's goal is to build an infrastructure that delivers cost-effective energy efficiency projects and provides a comprehensive outreach and education element with the goal of raising partner and customer awareness about the benefits of energy efficiency.

Projects will adopt a comprehensive approach by including retrofits and their DSM alternatives to include: demand-response (DR), distributed generation (DG) (renewable self-generation), solar hot water and water efficiency as applicable.

The first year of the new program cycle was devoted to informing local governments of the new program and seeking opportunities for implementation. As a result of budgetary issues, economic situations and reduced tax revenues, the County put all retrofit projects on hold. The Partnership did support several New Construction projects which were not impacted by budgetary issues. The County proposed an Energy Revolving Fund and received approval through the County Board of Supervisors and as a result has over \$189,000 in the revolving fund through 2011. As a result, all EE incentives will be routed to the accounting fund, and will be used to procure more EE projects.

The parameters for tracking program achievements consist of EE goals for funneling projects to SoCalGas Core Rebate and Incentive Programs and the Strategic Menu Items filed with the CPUC.

The County completed two Savings By Design projects in 2011 and is underway with several retrofits including a Persistence Commissioning project that will be eligible for rebates and

incentives in 2012. The Partnership and County have made great strides to increase participation and implementation of energy savings projects since the Partnership inception.

### **SCG3633 #LGovP04 - San Bernardino County IOU Partnership Narrative**

SCE, SoCalGas and the County of San Bernardino (County) will form a 2010-2012 energy efficiency Partnership that will build upon and expand the County's efforts to enhance energy efficiency through state-of-the-art new construction and retrofits of existing buildings.

This Partnership will assist the County in achieving its green policy initiatives to formulate an integrated approach to energy efficiency. This will be a collaborative effort with the aim to build an infrastructure that would efficiently deliver cost effective energy efficiency projects thus reducing the "carbon footprint" created by County facilities. It would also provide a comprehensive outreach and education element with the goal of raising awareness about the benefits of energy efficiency. County facilities will be targeted for the retrofit, RCx and new construction elements.

As the first year of the new program cycle, the year was devoted to informing local governments of the new program and seeking opportunities for implementation. The top county facilities with the greatest opportunity were identified and targeted for the retrofit, RCx and new construction elements. Leveraging County management staff from various departments including special districts, sheriff, information technology, library, fire, and project management, proved to be an effective means in identifying opportunities that would have not otherwise been supported by SCE or SoCalGas programs.

The parameters for tracking program achievements consist of EE goals for funneling projects to SoCalGas Core Rebate and Incentive Programs and the Strategic Menu Items filed with the CPUC.

In 2011, the County completed 3 Savings By Design Projects and implemented 5 retrofit projects that essentially supported the Partnership to achieve its three year goal in 2011. Several retrofit projects were identified and will be completed in 2012. The County implemented their Strategic Plan task of installing a Utility Manager Software upgrade to allow them to track and pay utility bills countywide.

### **SCG3634 #LGovP05 - Santa Barbara County IOU Partnership Narrative**

The Santa Barbara County Energy Efficiency Partnership (SCEEP) is a joint project of SCE, SoCalGas, the County of Santa Barbara and the Cities of Santa Barbara, Goleta and Carpinteria. SCEEP leverages partner resources to reduce energy use, increase energy efficiency awareness and reduce greenhouse gas emissions in Santa Barbara County and partnering Cities.

The partnership supported the launch of Energy Upgrade California Whole House Retrofit Program (EUCa). The partnership has also been coordinating with the County of Santa Barbara's EmPower program which compliments EUCa by providing finance options to complete EE retrofits. The partnership also made progress building interest for cities to implement EE retrofits with the City of Santa Maria, City of Carpinteria, City of Santa Barbara, and the County of Santa Barbara.

### **SCG3635 #LGovP06 - SBCCOG Partnership Narrative**

The South Bay Energy Efficiency Partnership consists of the cities of Carson, El Segundo, Gardena, Hawthorne, Hermosa Beach, Inglewood, Lawndale, Lomita, Manhattan Beach, Palos Verdes Estates, Rancho Palos Verdes, Redondo Beach, Rolling Hills, Rolling Hills Estates, Torrance, South Bay Cities Council of Governments (SBCCOG), SCE, and SoCalGas. The Partnership is implemented by the South Bay Cities Council of Governments through the South Bay Environmental Services Center (SBESC).

Through the participation of SoCalGas, the West Basin Water District, the Los Angeles County Sanitation Districts, and Metro in the Partnership, a comprehensive and integrated approach to energy efficiency, natural gas efficiency, water efficiency as well as wastewater, storm water and potable water capital projects will be identified and developed ensuring that the municipalities are as energy efficient as possible.

During 2011, the Partners continued to meet monthly with IOU regional representatives to effectively share information about program implementation of EE projects, Energy Action Plans and discuss upcoming SBCCOG's SBESC regional events and workshops. The inclusion of SBESC's other partners - water agency representatives, Los Angeles County Sanitation Districts' representatives, and Los Angeles County Metropolitan Transportation Authority to the monthly meetings continued to provide opportunities to leverage the strengths of each other and the Member cities to cost effectively deliver energy and demand savings.

The Partnership exceeded its municipal key performance indicator goals for SCE. Partnership and SoCalGas technical staff coordinated with public agency staff to identify and implement SoCalGas projects in 2011 and identified gas projects for 2012 in excess of twice the three year goal.

### **SCG3636 #LGovP07 - San Luis Obispo County Partnership Narrative**

San Luis Obispo County Energy Watch (SLOCEW) is a joint partnership between the Economic Vitality Corporation, County of San Luis Obispo (County), PG&E, SoCalGas, and seven participating Cities. The Partnership will manage the administration, marketing, integration and implementation components of this Partnership program. Through the SLOCEW Partnership, emphasis will be placed on the outreach to the Cities and Special Districts within San Luis Obispo County to assist them in improving the energy efficiency of the County's facilities and integrating energy efficiency throughout the local communities.

In 2011, emphasis was placed on better engaging the municipal partners, identification of municipal retrofit projects and potential funding sources. Significant savings were realized by the municipal facilities through participation in the Small Business Direct Install program. These benefits were primarily related to lighting retrofits and HVAC tune-up measures.

Marketing of the small business direct install program to the business community and the Energy Upgrade California program outreach to contractors and residential customers were a primary focus. The Partnership also continued to promote local implementation of third-party programs. Outreach efforts also included inserts in chamber newsletters with case studies on successful programs. The partnership will continue to develop and report case studies and the participants will be featured in future newsletters. The partnership has laid groundwork for the implementation of new programs in 2012. One such program is a “Kill-O-Watt” meter lending program which will be implemented and monitored by the local libraries. An energy efficiency kiosk will be placed near the County Permit Center to provide customers with information on rebates and programs for residential, multi-family and commercial customers.

Educational efforts focused on code compliance training, with an expansion to the development of training on the opportunities at the point of sale for local hardware and building supply distributors.

Strategic Plan efforts focused on initiating discussions between local jurisdictions to enhance awareness regarding utility resources for Climate Action Plan development. As a result of these efforts, the San Luis Obispo County Air Pollution Control District is moving forward with development of a Regional Toolkit to assist the Cities in moving forward with Climate Action Plan development, due in part to the financial support of the utility programs.

Based upon input from the Local Government Partners, the need to attend regularly scheduled meetings has been reduced while direct support to local programs and community outreach moved to the forefront. This is felt to be consistent with the goal to integrate energy efficiency resources and expertise at the local government level.

## **SCG3637 #LGovP08 - Tulare County-Visalia Energy Watch Partnership Narrative**

The SJVELP Program is a Local Government Partnership proposed to be comprised of the County of Tulare and the cities of Exeter, Farmerville, Lindsey, Portersville, Tulare, Visalia, Woodlake, SCE, SoCalGas, the implementing partner: The San Joaquin Valley Clean Energy Organization (SJVCEO), and potentially PG&E.

The Partnership’s comprehensive portfolio of activities is designed to seek innovative approaches to energy efficiency in California’s central valley environment; to increase adoption of energy efficiency measures and best practices within their municipality and community by continuing a “culture” of energy efficiency through focused educational and outreach events; and to increase the effective delivery of technical and financial energy services to residents and businesses. ME&O activities will consist of staff training, SCE’s Mobile Education Unit at

home shows, fairs and farmers market nights, technical training at the local colleges, marketing and co-branding with SCE core programs, and evaluate implementing an AB 811 financing mechanism for citizens of Tulare County.

The partnership made strong progress supporting the California Long Term Energy Efficiency Strategic Plan (CLTEESP). The partnership has made key advancement with Benchmarking of City and County facilities, and is on target to complete the objective by year end 2012. SoCalGas continues to work with the Cities and Counties to identify and funnel EE retrofit projects to Core rebate and incentive programs; however, economic conditions have made it very challenging for cities to justify upgrades.

### **SCG3638 #LGovP09 - Orange County Cities Partnership Narrative**

The Orange County Energy Partnership (OCEP) will optimize opportunities for several Orange County jurisdictions, including Huntington Beach (HB), Fountain Valley, Costa Mesa, Westminster and Newport Beach. Through this Partnership, the program will deliver short and long-term energy savings in municipal buildings, and commercial buildings and the residential sectors. OCEP will help promote energy efficiency to a level not yet achieved in these cities. Opportunities to provide information and education targeted to the specific demographics in these communities will be seamlessly integrated with resource programs that develop hard savings.

The cities, SoCalGas and SCE conducted monthly partnership meetings to plan the execution of municipal facility retrofit projects, strategic plan and marketing, education, and outreach activities. Meeting agendas were structured around the goals of the partnership: municipal facility retrofits, strategic plan support, and core program coordination. The Partnership also attended quarterly all-partner meetings where each city had the opportunity to learn from the experiences of the others.

The Cities prepared a detailed marketing, education and outreach plan for the current program cycle. By promoting EE at community events, the residents of the cities in the partnership are far more aware of the most current programs, rebates and educational classes available to them.

Hard natural gas savings from the program have been difficult to achieve based on the natural gas usage profiles of the cities. HB uses the most natural gas and the single largest use is to pump potable water. However, these assets are long-lived and have a planned capital replacement program that is difficult to accelerate since it is based on water rates and revenues. The remaining balance of the gas usage is primarily for space and water heating in facilities distributed throughout the participating cities. The incentives to replace this equipment are not significant enough to motivate early retirement in government facilities. HB has several incentive applications for natural gas savings that will be completed in 2012 that will provide the bulk of the hard natural gas savings for this partnership.

## **SCG3639 #LGovP10 - ILG-ICLEI-LGC Partnership Narrative**

SCE, PG&E, SoCalGas, and SDG&E have co-funded contracts with ICLEI, the Institute for Local Government (ILG) and the Local Government Commission (LGC) to provide a coordinated statewide program of workshops, technical assistance, a recognition program, and other means to allow local governments to share best practices associated with energy management. This statewide program is called the Statewide Energy Efficiency Collaborative (SEEC). Work performed in this program is coordinated with the statewide local government energy efficiency best practices coordinator, whose contract is also co-funded by the four IOUs.

The Beacon Award, implemented by the Institute for Local Government, has accepted 33 local governments into the program. The Program has provided interim recognition to eleven cities for their sustainability accomplishments made to date. ILG has presented the Beacon Award and general energy efficiency information at several conferences and meetings to create further awareness to local governments. ILG has also continued to update and expand their California Climate Action Network Best Practices Framework and other resource materials, with emphasis on energy efficiency and energy savings for Local Government's use.

During 2011, ICLEI began developing and delivering a suite of resources to aid local governments with the implementation of energy efficiency measures, reducing related greenhouse gas emissions. As of December 31, 2011, ICLEI had conducted 18 in-person workshops and 2 webinars; and has completed the following tools and/or guidance documents: guidance on municipal and community-wide GHG inventories, an online municipal GHG inventory tool, an online community-wide GHG inventory tool, guidance on emission forecasting and target setting, a Climate Action Planning guidebook and template, a sample Climate Action Plan with measures, the Climate & Air Pollution Planning Assistance (CAPPA) tool, and the City Planners' Energy Action Handbook.

## **SCG3640 #LGovP11 - Community Energy Partnership Narrative**

The Community Energy Partnership's (CEP's) 2010-2012 program builds upon the CEP's successful, award-winning model originated in 1992 by enhancing the leadership role of cities in energy management. Over the past 17 years, the CEP has evolved from the Irvine Energy Efficiency Initiative to a seven cities program that defines a true partnership between local governments and utilities focused on achieving energy savings and behavioral change in residential, non-residential and the municipal sectors.

This approach will allow the CEP to be flexible in the customization of solutions to overcome challenges and exploit opportunities faced by local governments. In doing so, local governments will be able to develop individualized action plans for achieving both local and statewide goals and targets. Through this framework, the CEP program supports local governments who are willing to commit and sustain the appropriate level of participation and resources to effectively initiate programs that address the main issue areas for local government action that are identified in the CLTEESP.

The CEP is a non-resource program for SoCalGas with the intent of funneling projects to Core programs. In 2011, working closely with individual city and its staff, a pipeline of growing number of gas projects has been developed. The Program has achieved 45% of its target gas savings goal for 2010-12. SoCalGas has successfully leveraged OBF funding to expand the scope of a municipal project to achieve greater energy savings. SoCalGas started working on a municipal waste treatment project that has significant gas savings potential. It is anticipated that the Program would reach its savings goals in 2012.

The Partnership continues to collaborate and leverage other statewide and local programs to advance energy efficiency ethics and build local government capacity. CEP has successfully collaborated with statewide Codes & Standards to deliver T24 trainings for cities' building inspectors and plan checkers. CEP has collaborated and leveraged SBD and RCx Programs to meet the cities' needs to achieve energy savings and more efficient building design.

### **SCG3641 #LGovP12 - Desert Cities Partnership Narrative**

The Desert Cities Energy Partnership includes the Coachella Valley Association of Governments (CVAG), SCE, and SoCalGas with cooperation from Imperial Irrigation District. CVAG is a local government agency, including 10 cities, Riverside County, and three tribal governments (collectively referred to as Jurisdictions) as its members. CVAG will partner with SCE and SoCalGas for this partnership. CVAG will coordinate education and outreach efforts, a valley-wide marketing program, as well as related administrative and reporting activities. Through its existing communication network, CVAG will provide outreach to the member jurisdictions and the larger Coachella Valley community about energy efficiency. SCE and SOCALGAS will provide energy information, technical assistance, and assist the jurisdictions with implementation of municipal facilities retrofits and energy efficiency upgrades. The IOUs will provide resources and support, as available, for training, events, and marketing programs.

As the first year of the new program cycle, 2010 was devoted to informing cities of the program and seeking opportunities for implementation. Cities were faced with budget constraints and staffing issues which made it challenging to identify and implement energy programs.

The Partnership met quarterly with energy champions from each city as well as meeting one-on-one with key stakeholders from each respective city. The Partnership also assisted cities with their outreach of EE programs by participating in several community events, conducting presentations, and hosting numerous training workshops which support the Partnerships Strategic Planning initiatives.

The Partnership tracked all energy efficiency projects with Partners on a monthly basis to ensure that projects at municipal facilities were on track. Annually, the Partnership will generate reports of community program participation and report back to the Partners overall savings results achieved within each city.

The Partnership conducted several workshops including Reach Codes and Climate Action Plan training to promote Strategic Plan support and CVAG continues to make great strides

implementing their Green Government Initiative as a result of a Strategic Funding grant from SCE. The initiative includes developing policy and assistance with Climate Action Planning, Greenhouse Gas Emissions Inventory, Energy Action Plans, Green Building, Utility Management Software, RCx, Benchmarking and Education and Outreach.

The City of Indian Wells retrofitted their low-income housing complex, Indian Wells Villas, replacing their storage water heaters with 90 tankless water heaters and are in the process of retrofitting water heaters at their Mountain View Villas. The City of Palm Springs implemented a residential rebate match program for retrofit of natural gas appliances and plans on expanding the program to commercial customers in 2012.

### **SCG3642 #LGovP13 - VCREA Sub-Program Partnership Narrative**

The Ventura County Regional Energy Alliance (VCREA) consists of nine cities and one county. The Cities of Camarillo, Fillmore, Moorpark, Ojai, Port Hueneme, Santa Paula, Thousand Oaks, and Ventura along with Ventura County are members of the Alliance. The Alliance implements its program of comprehensive energy savings organized through a single energy office for public agencies and non-profit service providers.

VCREA Board of Directors is composed of elected officials from various public agencies and provides the policy and leadership for the program. The Board has been instrumental in building an ethic of energy efficiency in the region that has led to friendly competition among public agencies and greater desire among community activists to have their own local “green councils” to take action. VCREA is not a mandated public agency, but rather an outcome of collaboration among regional leaders concerned specifically with energy issues.

In 2011, working in conjunction with SCE and SoCalGas, VCREA continued as the Local Government Partner to coordinate efforts among the cities of Camarillo, Fillmore, Moorpark, Ojai, Oxnard, Port Hueneme, Santa Paula, Thousand Oaks and Ventura, and the County of Ventura to undertake energy efficiency projects, train public agency staff and consider opportunities for long term strategic energy efficiency planning as part of the 2010-2012 program cycle. The utilities’ representatives and VCREA take the mission on the road twice to meet individual city and its staff to discuss energy efficiency opportunities and help advance energy efficiency projects, outreach events, education and training; and strategic plan support.

The Ventura Partnership Program has been the cornerstone of the VCREA program and has provided a strong impetus toward meeting the VCREA mission. The current program cycle has been augmented with programs like Energy Upgrade California that is a jointly sponsored statewide program amongst the Investor Owned Utilities and has been locally supported by the Ventura Partnership Program to encourage the training, certification and employment of energy efficiency contractors and service providers. And finally, the VCREA Board has undertaken its own strategic planning effort to align its mission with available resources in support of statewide goals and local objectives.

In 2011, Ventura Partnership Program highlights included: Four Technical Training Seminars benefitting approximately 138 individuals; Ten Community Events reaching approximately 18,800 individuals; Coordination of a BOC Level I Course for the region benefitting 11 local government agencies and including 23 staff/individuals; Strategic Planning Efforts – Six workshops and meetings covered planning efforts and energy codes topics benefitting approximately 97 individuals; Six Bi-monthly Newsletters in print and electronic formats, as well as operation of informational website; Marketing and Information Outreach to 17 kiosks located at Libraries, Chambers of Commerce, and City Halls throughout Ventura region; and continued to build a project pipeline to achieve energy savings in municipal facilities.

## **SCG3644 #Local01 - OBF Narrative**

The SoCalGas On-Bill Financing (OBF) option is designed primarily to facilitate the purchase and installation of comprehensive, qualified energy efficiency measures by customers who might not otherwise be able to act give capital constraints and/or administrative and time burdens. It is designed to build on the success of the 2006-2008 program cycle offering.

Approved customers will be eligible to receive a full rebate or incentive from the participating programs and to finance the balance of qualified energy efficiency measures. Loans are not transferable. Partial or non-payment of loans could result in shut-off of utility service and turned over for collection.

The OBF Program staff worked closely with SoCalGas Account Executives and vendors to recruit qualified OBF projects. The staff also worked with Market Segment Advisors to incorporate OBF information into marketing brochures targeting various business market segments. In 2011, OBF financed seven energy efficient projects with a total of about \$210,000 in loans. These projects were estimated to contribute approximately 115,000 therms savings a year.

Implementation barriers encountered in 2011 included: (1) difficulty for many business customers to qualify for OBF due to the project payback periods of over the 5-year maximum required for business project eligibility; and (2) some local governments' concerns over whether they can sign multi-year loan agreements without first obtaining two-thirds of voter approval.

A new OBF feature was added in 2011 that allows institutional and chain account customers to aggregate projects at different sites of the same customer as one so that the resulting combined total loan amount or overall project payback can meet OBF's minimum loan amount or maximum project payback requirements. This new feature is developed to assist institutional and chain account customers upgrade certain gas equipment common to multiple sites to higher efficiencies with zero percent financing. Without it, some energy efficiency opportunities may not be pursued due to lack of funding. All projects are still subject to verification to ensure they meet program eligibility requirements.

SoCalGas tracked the number of loans issued, accumulative loan amount issued, accumulative projected energy savings, unpaid balances, and defaults, if any, to monitor program performance and achievements.

## **SCG3645 #Local03 - Local Sustainable Communities Narrative**

SoCalGas Local Sustainable Communities (SC) program provides the framework for the design and building of communities that support the environment through energy- and resource-efficiency. SC helps to enhance quality of life by protecting and preserving natural resources and improving economic development. Incentives and other assistance are available to developers, building owners, and design teams that construct highly energy-efficient buildings with sustainable design, and long-term energy-efficiency.

This highly innovative program will be SoCalGas flagship program providing the path for all other programs in meeting California's long-term energy efficiency goals, including zero net energy homes by 2020. This program will enable market transformation resulting in measurable energy efficiency, integrated demand response, distributed generation, renewables and natural resource savings while optimizing long term ecological, social and economic health of California. It accomplishes this by comprehensively integrating the "vertical" development (buildings and their components) with the "horizontal" development (land and utility and transportation infrastructure) over the full planning horizon. This holistic approach to program design and implementation is coupled with a new management model and evolutionary improvements in energy, water and air quality savings over the project life.

The pilot project (Rancho Mission Viejo) selected to participate in SC did not progress as expected. The objectives filed for in the SC Program Implementation Plan (PIP) were very much tied to the construction cycles of the selected pilot project. Because of the inactivity of the pilot project, SC terminated involvement in this project, and sought other alternative projects.

In 2011, SoCalGas evaluated three potential Sustainable Communities projects (Irvine Park, College of the Desert, Paradise Valley) and identified Paradise Valley (a sustainable community project in the Palm Desert area) as a viable candidate. SoCalGas concluded a Memorandum of Understanding with Paradise Valley in 2011, and is providing design assistance through a consulting contract with KEMA, supported by Navigant Consulting on water related design issues. The project is currently in design phase and is expected to commence construction of homes in 2015. Several design charrettes are planned in 2012. Training will include: Training Modules, In-Person training, a Digital Learning Center, and related hardware for the center.

SoCalGas is currently exploring another potential sustainable community project in Playa Vista. SoCalGas is also in discussions with SCE for three possible joint projects where gas savings are significant.

## **SCG3646 #Local04 - Local Strategic Develop & Integ Narrative**

In order to create market transformation in California, SoCalGas is committed to the vision and goals outlined in the CLTEESP. This plan includes customer segmentation and targeted program development and the integration of EE/DSM and emerging high efficiency technologies coupled with innovative and comprehensive program design and theory,. A focused team of qualified resources has been identified to support these activities and drive the direction of the programs through innovation and the inclusion of best practices. This team will be dedicated to this activity and will act as a coordinating entity by collaborating with regulatory, program, technology and other staff.

Provided guidance and acted as an ongoing information source for integration activities and program innovations associated with emerging technologies, best practices, and market awareness. Worked in partnership with, and provided information and guidance to, program sector management to ensure that interim milestones and approaches are directed toward the long-term vision.

The program developed an intranet based roadmap or “tracker” addressing and aligning priorities with the Energy Efficiency Strategic Plan, briefing meetings were held with EE managers and their key employees. The roadmap and tracker will be used as the platform to develop training for 2012 and beyond. Staff members working with their internal EE market segment and program managers examined how EE/DR programs work from end to end to identify potential hurdles both programmatic an process and identified strategies to address issues in weekly meetings. The program evaluated EE programs and documented findings including cost effectiveness of rebates, utility best practice analysis, audit recommendation process, internal IT systems and processes. Program members participated on teams to improve programs (i.e., Therm Team) and processes (ie, kWickView analysis). The team Reorganized Strategic Planning’s Sharepoint site to improve content search capabilities and created user guides to support site content.

Provided guidance and acted as an ongoing information source for integration activities and program innovations associated with emerging technologies, best practices, and market awareness. Worked in partnership with, and provided information and guidance to, program sector management to ensure that interim milestones and approaches are directed toward the long-term vision.

## **SCG3647 #SW-C&SA - Building Standards Advocacy Narrative**

The Building Codes Advocacy subprogram primarily targets improvements to Title 24 Building Efficiency Regulations that are periodically updated by the California Energy Commission. The subprogram also seeks changes to national building codes that impact CA building codes. Advocacy activities include, but are not limited to, development of code enhancement proposals and participation in public rulemaking processes. The program may coordinate with or intervene in ratings organizations that are referenced in Title 24; for example, the National Fenestration Rating Council, and the Cool Roof Rating Council.

In 2011, the statewide IOU team conducted research, analysis, and stakeholder meetings in support of numerous CASE studies for 2013 Title 24 proceedings.

Significant delays in adoption and effective dates for current cycle codes were identified due to a lack of resources at the California Energy Commission.

The 2011 savings goal for Building Standards Advocacy is on track. Much of the savings is to be determined at a later date after the CPUC evaluators complete attribution studies.

### **SCG3648 #SW-C&SB - Appliance Standards Advocacy Narrative**

The Appliance Standards Advocacy subprogram targets both state and federal standards and test methods: improvements to Title 20 Appliance Efficiency Regulations by the California Energy Commission, and improvements to Federal appliance regulations by the US Department of Energy. Advocacy activities include, but are not limited to, development of code enhancement proposals and participation in the public rulemaking process (Title 20), and comment letters based on IOU research and analysis (USDOE), and participation in direct negotiations with industry. Additionally, the program monitors state and federal legislation and intervenes, as appropriate

In 2011, the statewide team supported California Energy Commission efforts to adopt standards for battery charger systems and conducted research and analysis in support of CASE studies for future California Energy Commission rulemakings. Additionally, the statewide team conducted research and analysis on numerous USDOE rulemaking events and submitted comments.

Due to a lack of resources at the California Energy Commission a limited scope of standards will be addressed during this cycle.

The 2011 savings goal for Codes and Standards is on track. Much of the savings is to be determined at a later date after the CPUC evaluators complete attribution studies.

### **SCG3649 #SW-C&SC - Compliance Training Narrative**

Compliance Enhancement includes Extension of Advocacy (EOA) elements of building and appliance standards subprograms, and the Compliance Enhancement Subprogram (CEP). While EOA targets improvements in compliance with building or appliance efficiency regulations and development of compliance infrastructure, CEP supports local government process improvement. Compliance improvement in buildings is achieved through education, training, and other activities targeting building departments and other building industry actors responsible for compliance. Activities may include development of “tools” and other elements of infrastructure that serve multiple compliance enhancement objectives. Improvements in compliance with appliance efficiency regulations are achieved through communications, outreach, and other activities targeting manufacturers, retailers, and other California suppliers.

In 2011, the statewide C&S team delivered role-based training sessions, established a compliance improvement advisory group to provide industry guidance to IOUs, supported improvements to certified energy analyst examinations, and commenced a local government best practices survey. In addition, the 2011 savings goal for Codes and Standards is on track. Much of the savings is to be determined at a later date after the CPUC evaluators complete attribution studies.

### **SCG3650 #SW-C&SD - Reach Codes Narrative**

The Reach Codes subprogram provides technical support to local governments that wish to adopt ordinances that exceed statewide Title 24 minimum energy efficiency requirements for new buildings, additions, or alterations. Support for local governments includes research and analysis for establishing performance levels relative to T-24 and cost effectiveness per Climate Zone, drafting of model ordinance templates for regional consistency, and assistance for completing and expediting the application process required for approval by the California Energy Commission. The subprogram also supports local governments that seek to establish residential or commercial energy conservation ordinances for existing buildings

In 2011, the statewide IOU team provided technical support to local governments that adopted reach codes and completed the required California Energy Commission approval process. Economic downturn in the State is creating resistance to mandatory ordinances. There is resistance to the reach code revision process from the building industry, some local elected officials in addition to some lighting organizations.

The 2011 savings goal for Codes and Standards is on track. Much of the savings is to be determined at a later date after the CPUC evaluators complete attribution studies.

### **SCG3651 #SW-HVACA - Residential Energy Star Quality Installation Narrative**

The Residential Energy Star Quality Inspection Program (ES QI) addresses residential installation practices to ensure that equipment is installed and commissioned per industry standards.

Plans were in place to evolve the current program to become compliant with the PIP. Feasibility research is on-going to offer a HVAC residential QI through a joint utility strategy.

SoCalGas worked with the Statewide IOU HVAC Committees individually and through the Western HVAC Performance Alliance (WHPA) on all Statewide PIPs for implementation and logistics. SOCALGAS also engaged with industry feedback on existing programs. In addition, SOCALGAS worked with SCE to determine energy savings and cost effectiveness of measures by climate zone.

SoCalGas used Microsoft Project to track the goals as set forth in the PIPs and the CLTEESP. SoCalGas also worked to ensure the inclusion of natural gas HVAC measures into the ES QI protocols to achieve therm savings. Goals were aligned with the proposed HVAC Action Plan.

### **SCG3652 #SW-HVACB - Commercial Quality Installation Narrative**

The HVAC Commercial Quality Installation Program addresses commercial installation practices to ensure that equipment is installed and commissioned per industry standards.

SoCalGas researched gas measure cost-effective opportunities for the Commercial Quality Installation (QI) program.

Research was on-going to determine the cost-effectiveness of implementing a Commercial Quality Installation program. Uncertainties in consumer behavior/preference generate difficulty in creating effective/defensive measures. SoCalGas continues to work with the SW IOUs to develop a rigorous procedure for the program.

PPMs have been established for this statewide program. The metrics for tracking program achievements include the following:

- Percentage of HVAC contracting companies that are participating in statewide commercial QI program as a share of the targeted market ("Target market" defined as C20 licensed HVAC contracting companies in CA).
- Average percentage of "certified" HVAC technicians within each contracting company that participates in the commercial QI program.

### **SCG3653 #SW-HVACC - Commercial Upstream Equipment Narrative**

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

SoCalGas researched gas measure cost-effective opportunities for the Commercial Upstream program. SoCalGas has not developed a program for this element because (1) the EE technology in gas furnaces is limited due to high cost, (2) the strategy has a higher impact on electric savings than natural gas savings.

Subsequent to the completion of research to determine the cost-effectiveness of a gas commercial upstream program, statewide PPMs will be determined.

### **SCG3654 #SW-HVACD - Quality Maintenance Program Narrative**

The HVAC Quality Maintenance Development Program addresses residential and commercial maintenance practices to ensure that equipment is serviced per industry standards and that the maintenance effort supports the long term strategic goal of transforming the trade from commodity-based to quality-based.

Continued research efforts to identify viable measure(s) and determine the cost-effectiveness of implementing a Residential and Commercial Quality Maintenance program. Feasibility research is on-going to offer the program through a joint utility strategy.

PPMs were established for this statewide program. The metrics for tracking program achievements included measured progress towards specific milestones provided in the project Gantt chart indicating the development/ finalization of this IOU program based on Quality Maintenance standards.

### **SCG3655 #SW-HVACE - Technology & Systems Diagnostics Narrative**

The Program is a coordination and advocacy program that addresses the technical elements critical to increasing the market introduction of advanced cooling and fault detection and diagnostic technologies.

The program has not been fully implemented in 2011. Effort has been made to collaborate with Emerging Technologies Program to identify and evaluate viable and cost effective technology.

SoCalGas worked with the Statewide IOU HVAC Committees individually and through the Western HVAC Performance Alliance (WHPA) on all PIP's for implementation and logistics. SoCalGas was also engaged with industry feedback on existing programs.

The Automated Fault Detection Subcommittee of Western HVAC Performance Alliance's Technology Committee, was established in 2010 to spearhead this effort. This committee has met several times on a regular schedule and brainstormed items that needed to be on the roadmap. A draft "Onboard and In-Field Fault Detection and Diagnostics—Industry Roadmap" has been developed by this committee. The draft roadmap includes strategies and timelines to address gaps, barriers, lack of standards and protocols. Several items that were identified in the roadmap are currently underway, including efforts with industry, researchers, utilities and regulatory bodies. An effort with ASHRAE was successful and resulted in ASHRAE establishing a standards project committee for "Laboratory Method of Test of Fault Detection and Diagnostics Applied to Commercial Air-Cooled Packaged Systems".

SoCalGas used Microsoft Project to track the goals as set forth in the program implementation plan and the CEESP. Goals were aligned with the proposed HVAC Action Plan.

### **SCG3656 #SW-HVACF - HVAC WE&T Narrative**

SoCalGas worked with the Institute of Heating and Air Conditioning Industries (IHACI) and North American Technicians Excellence (NATE) to provide NATE certification training for contractors, technicians, and industry players. A series of HVAC related topics were offered through the SoCalGas Education and Training Program to aid the process during 2011.

Statewide HVAC IOU program staff reviewed the WE&T Needs Assessment after its completion in early 2011. The program staff implemented multiple elements of the WE&T

Needs Assessment that were congruent with the HVAC WE&T Statewide PIP, particularly related to WE&T elements of the re-designed Residential and Commercial Quality Maintenance program. These activities included meeting all of the deliverables in 4.C. of the HVAC WE&T PIP during 2011. These activities also included working with the Western HVAC Performance Alliance on WE&T elements of the Strategic Plan. Program staff worked with the following stakeholders to leverage WE&T opportunities in QI/QM: contractors, owners, technicians, apprentice/installers, salespeople, students, and building officials.

One of the barriers faced in the implementation of this program was the lack of facility space needed to accommodate the potential participants. SoCalGas offered training at its Downey Energy Resource Center and Chatsworth facilities. Contractors in the Inland Empire and desert regions expressed interest in the training program but distance prohibited participation. SoCalGas was seeking partnerships with HVAC equipment distributors' facilities as optional venues to offer the training program in these outlying areas.

Participants were required to reserve space in advance through an online registration system, sign in at the time courses are offered, and received a certificate of attendance at the completion of course. The program tracked not only participation, but also captured participants' occupation, company, and title.

### **SCG3657 #SW-HVACG - HVAC Core Narrative**

The Statewide Residential and Commercial HVAC Program delivers a comprehensive set of downstream, midstream, and upstream strategies that builds on existing program, education, and marketing efforts and leverages relationships within the HVAC industry to transform the market towards a sustainable, quality driven market. Market transformation and direct energy savings and demand reductions are achieved through a series of six sub-program that make up the comprehensive program approach.

As stipulated in the co-programs, the program successfully recruited, organized, and managed the different elements to achieve the goals as set forth in the CLTEESP.

SoCalGas worked with the Statewide IOU HVAC Committees individually and through the WHPA on all Statewide PIPs for implementation and logistics. SoCalGas was also engaged with industry feedback on existing programs. In addition, SoCalGas involved several internal partners to assist in the transformation processes. Because of its limited program budget, SoCalGas determined that utilization of internal partners and continued coordination with the statewide team is necessary for future program success.

SoCalGas used Microsoft Project to track the goals as set forth in the PIPs and the CLTEESP. Goals were aligned with the proposed HVAC Action Plan.

## **SCG3658 #SW-IDSM - SW Integrated DSM Narrative**

The California Long Term Energy Efficiency Strategic Plan (CLTEESP) recognizes the integration of demand-side management (DSM) options including energy efficiency (EE), demand response (DR), and distributed generation (DG) as fundamental to achieving California's strategic energy goals. To support this initiative, the IOUs have identified integrated DSM (IDSM) as an important strategic DSM policy priority and have proposed a series of activities, pilots and other programs in response to the Strategic Plan DSM Coordination and Integration Strategy.

An IOU and Energy Division Statewide Integration Task Force (Task Force) will coordinate activities that promote, in a statewide-coordinated fashion, the strategies identified in the Strategic Plan and the eight integration directives described in the EE decision as follows:

- Development of a proposed method to measure cost-effectiveness for integrated projects and programs including quantification and attribution methods that includes GHG and water reductions benefits and the potential long-term economic and electric/gas hedging benefits.
- Development of proposed measurement and evaluation protocols for IDSM programs and projects.
- Review IDSM enabling emerging technologies for potential inclusion in integrated programs.
- Development of cross-utility standardized integrated audit tools using PG&E's developed audits as a starting point.
- Track integration pilot programs to estimate energy savings and lessons learned and develop standard integration best practices that can be applied to all IOU programs based on pilot program evaluations and the results of additional integration promoting activities (i.e., EM&V and cost-benefit results).
- Develop regular Reports on progress and recommendations to the Commission.
- Organize and oversee internal utility IDSM strategies by establishing internal Integration Teams with staff from EE, DR, DG, marketing, and delivery channels.
- Provide feedback and recommendations for the utilities' integrated marketing campaigns including how the working group will ensure that demand response marketing programs approved as category 9 programs are coordinated with EE integrated marketing efforts.

The following was accomplished in 2011:

- A white paper on IDSM cost effectiveness was developed at the end of 2010 and the observations and recommendations were presented at a public workshop in March 2011. The final white paper and associated public comments were submitted to the Energy Division on May 18, 2011. Further efforts on developing integrated cost effectiveness and EM&V methodologies are on hold pending direction from the Energy Division.

- The Task Force tracked multiple integrated emerging technologies and reviewed various programs, projects (including IDSM Pilots) and activities to identify integration efforts and opportunities and to develop best practices.
- The IOUs submitted four joint quarterly reports for 2011, including an Executive Summary section, to provide Energy Division staff with updates on the eight integration directives. All 2010 and 2011 quarterly reports were uploaded and available for viewing on EEGA.
- The statewide IDSM Task Force held regular coordination phone calls and met in person on a quarterly basis to review the status of the various support activities for this IDSM initiative.
- The IOUs have delivered numerous pieces of integrated collateral or campaigns to residential and business customers that promote multiple programs across EE, DR, DG and/or AMI.
- In addition to the meetings described above, the IOUs have coordinated on a Statewide basis in several areas:
  - The Online Integrated Audits team is coordinating to deliver an online integrated audit tool that works with each IOU interface and meets the CPUC compliance requirements.
  - The Onsite Integrated Audits team is collaborating to share approaches and best practices and to discuss ongoing collaboration.
  - The Integrated Marketing team meets on a regular basis to discuss integrated efforts, best practices and to identify opportunities for coordination.
- SoCalGas IDSM efforts included :
  - On-going IDSM training for Program, Marketing and Sales staff that have effectively increased understanding of IDSM concepts, approaches and CPUC directives
  - External IDSM training through our Energy Information Centers and Trade Professional groups
  - Continued coordination with vendors to provide the audit tool to residential and small commercial customers as part of their customer web experience.
  - Integrated marketing campaigns and collateral continued throughout the year for business and for residential / smaller business customers
  - The ESAP and Residential EE staff developed an IDSM Plan for 2012 that includes employee training, integrated marketing and program leveraging.
    - Leveraging the ESAP opportunities presents customers with seamless opportunities to participate in, and maximize benefits from, Customer Assistance and Energy Efficiency (“EE”) programs.
    - ESA Program coordinated marketing and outreach efforts with other assistance programs (i.e., CARE, Medical Baseline Allowance, and Gas Assistance Fund).
    - Working with EE program’s Mobile Home Program and other third-party EE program contractors to integrate the installation and services.
    - Currently, SoCalGas and SCE use a joint energy education guide as a primary tool for joint utility enrollments and leveraging opportunities.

- Developed a Low-Income Home Energy Assistance Program (LIHEAP) leveraging framework that helped capture installations of measures common to both the ESAP and LIHEAP.
- Leverage program funds with water districts for the installation of High Efficiency (“HE”) Washers under SoCalGas ESA Program, continues collaborating with Eastern Municipal Water District (EMWD) and Metropolitan Water District (MWD).
- SoCalGas created an internal IDSM core teams that encompass approximately 10 representatives from the areas of EE, DR, Solar Thermal/DG, Marketing, Low Income and Strategy. Key role of team:
  - Define integration -What does it mean to SoCalGas?
  - Document and report CPUC regulatory mandates.
  - Collaborate across departments/sectors/teams/groups.
  - Liaisons on integrative efforts between departments/sectors/teams/groups.
  - Investigate existing and new ideas on integration at SoCalGas. Where are we already integrating?
  - Create workshops and other integration relationship and culture building activities internally.

The IOUs submitted four joint quarterly reports for 2011, including an Executive Summary section, to provide Energy Division staff with updates on the eight integration directives. All 2010 and 2011 quarterly reports were uploaded and available for viewing on EEGA.

## **SCG3659 #SW-ME&OC - ME&O Strategic Plan Narrative**

The strategic plan is a non-resource initiative, based on collective input and ratepayer funding from California’s IOUs. The goal of the ME&O strategic planning effort is to create a culture in California that practices energy efficiency and other demand side management options as a way of life resulting in both short-and long-term behavior changes. Because many consumers believe that they are already doing everything they can to save energy, a concerted effort must be made to convince them that they can, in fact, do more.

The Strategic Plan subprogram applied the results of the Brand Assessment, Brand Development, and the Marketing & Integrated Communications Plan; and furthermore, launched the new Web Portal.

These efforts worked collaboratively with the M&O subprogram and the new Engage 360 brand. The projects developed under this subprogram have been: 1) Web Portal, Web Hosting, and Maintenance, and 2) Brand Assessment, Brand Development and the Marketing & Integrated Communications Plan.

An Assigned Commissioner Ruling Regarding the Statewide ME&O Program was issued October 13, 2011, which officially suspended all ME&O activities until Commission Staff could provide Commissioner Ferron recommendations on how to re-strategize the program. Parties

were asked to provide their recommendations about program design, which each utility did. No additional program activities took place between September and December 2011.

On March 20, 2012 the Proposed Decision Providing Guidance on 2013-2014 Energy Efficiency Portfolios and 2012 Marketing, Education and Outreach directed utilities to abandon the Engage 360 brand and replace it with the Energy Upgrade California (EUC). It is not anticipated that any activities related to Engage 360 will occur in 2012 aside from sun setting the brand. Statewide ME&O activities are expected to revolve around maintaining the EUC brand and strategic planning activities intended to expand EUC to transition to a brand that encompasses all demand side management products and programs.

### **SCG3660 #3P-NRes1 - Steam Trap and Compressed Air Survey Narrative**

The Program for Steam Trap and Compressed Air Survey (SCAS.) will provide compressed air and steam audits and evaluations to small, medium, and large industrial customers throughout SoCalGas territory. All customers of SoCalGas with air and steam systems will be eligible to participate in the program. Targets will be industrial customers, but other qualifying facilities including governmental, institutional, and military facilities may also participate if they meet the program requirements. This program is designed for a range of industrial customers from small to very large industrial processes with gas consumption greater than 50,000 therms per annum.

The STACAS program has demonstrated marked improvement during 2011 enrolling customers into the program, completing projects, and working with SoCalGas Account Executives. Since the commencement of the STACAS program, a total of 40 customer applications have been approved; 27 of which were approved during 2011. Twenty-two projects were completed and presentation meetings were held at the customers' facilities. Twenty-nine final reports were submitted to SoCalGas for approval. Seventeen SoCalGas Account Executives were involved in the Program with their customers.

One other area of particular success has been the training seminars the program has hosted throughout the program. In excess of 260 people registered for the three training seminars hosted during 2011.

Eighteen different milestones – starting with the submittal of the customer program application to SoCalGas through to the presentation meeting with the customer – were tracked and reported on a weekly basis.

### **SCG3661 #3P-NRes2 - Energy Challenger Narrative**

The Energy Challenger Program is a non-resource program that provides small and medium commercial and industrial customers with an on-line assessment/audit solution delivered through SoCalGas' website. In approximately 10 minutes, the customer is provided with a customized plan consisting of practical steps to reduce their energy use and costs including:

- A prioritized action plan for reducing their energy costs;
- Links to SoCalGas' rebates and services for energy savings;
- Benchmarking of the business' energy management practices.

The program marketing activities were conducted by SoCalGas to engage businesses in the program. The on-line assessment has been customized for SoCalGas' service territory and rebates.

The program completed 1,587 Energy Challenger assessments in 2011 with small and medium commercial and industrial customers, amounting to a total of 2,801 Energy Challenger assessments during the 2010-2011 program period. This total exceeded the 2010-2011 program goal of 1,500 assessments and equates to 187% of 2010-2011 program goal. The program experienced continued rapid customer uptake during 2011 following multiple marketing and outreach activities.

For customers conducting an Energy Challenger assessment, a key to the success of the program has been the short time to complete the assessment. Customer details for all customers who completed the Energy Challenger assessment are stored in a central database. This includes customer contact details, name and email as well as all responses to questions asked in the assessment. The database also includes management reporting on program progress. When a customer repeats the assessment (after their initial assessment), all repeat session data is stored in the same database, together with updated customer details and responses.

### **SCG3662 #3P-NRes3 - Small Industrial Facility Upgrades Narrative**

The Small Industrial Facility Upgrades Program will assist SoCalGas small industrial customers in becoming more energy efficient and productive through the adoption of existing, including low-penetration, technologies. The program will target small industrial customers with annual gas usage less than 50,000 therms. Upon SoCalGas approval, customers with annual usage higher than 50,000 therms or those which are assigned accounts may also be enrolled. The Program will offer proven measures currently used in SoCalGas' Deemed and Calculated Programs. These measures include calculated custom process improvements for heat recovery, process equipment replacement, and equipment modernization, furnace and oven improvements, and excess air reduction. The program will also include deemed measures such as boilers, water heaters, and steam trap replacements, along with insulation improvements.

Global Energy Partners (GEP) implements multiple energy efficiency programs for gas and electric utilities in California and other states. GEP is exposed to a wide variety of customers through these programs which provide the contacts to potential candidates for the SoCalGas energy efficiency program. Contacts are obtained directly at the plant level and through corporate energy management.

Overall program design was unchanged in 2011. However, internally GEP began to pursue opportunities for customers greater than 50,000 therms or that may have account executives already in place in order to further assist the energy efficiency implementation goals. This effort

is in addition to the ongoing effort to recruit customer participation within the small industrial facility category. It is therefore mutually beneficial for SoCalGas and the customer to allow GEP to process their incentives through the core programs.

GEP continued to provide program deliverables as required and pursued customers through ongoing marketing efforts. However due to the limited opportunity discovered at the beginning of the year the savings goals were not met in 2011. With the added ability to work with customers and ongoing development of relationships with customers, GEP is slated to gain significant traction and energy savings in 2012.

### **SGC3663 #3P-NRes4 - Program for Resource Efficiency in Private Schools Narrative**

The Program for Resource Efficiency in Private Schools (PREPS) is a new program of the SoCalGas 2010-2012 energy efficiency program portfolio. It is targeted to qualifying private schools, colleges, and other private institutions of learning in SoCalGas service area. Its goal is to reduce gas energy costs, reduce greenhouse gas emissions, and improve school district facility operations to enhance the learning environment.

Due to a slow ramp up period, the contractor, RSG, had little opportunity to work with customers and achieve energy savings until late July of 2011. Administration and marketing preparations had been made in anticipation of program launch in early 2011, including some contacts made to schools, vendors, trade allies, and SoCalGas Account Executives. Unfortunately, due to many schools' scheduling, most decisions regarding equipment upgrades had already been made, with purchase orders issued by mid-summer, hence, PREPS could not take advantage of these opportunities.

Nonetheless, since PREPS fully launched, the program consistently gained traction. Within half of a year, PREPS staff received fifteen signed Program Participation Agreements (PPA), with three of those projects committed and one installed by year-end. Furthermore, PREPS staff anticipates project identification, commitment, and installation on over 50% of the remaining signed participants from 2011 in 2012. While the program is currently under goal, the PREPS team is confident that the savings forecasted in 2010 and most of 2011 will be made up in 2012 to bring the program back on target.

PREPS did not meet its 2011 savings goal objectives due to the barriers to implementation mentioned above; particularly the extremely delayed program launch that began in late July 2011. PREPS staff had less than six months to ramp up the program with an approved list of measures before year-end. However, PREPS staff has worked closely with SoCalGas to overcome these and other more minor issues/questions to move toward program success. For instance, although PREPS is still not reporting in the SMART tool, SoCalGas has enabled the program to pay customers utilizing an alternative method until the set-up is complete.

## **SCG3664 #3P-Res01 - On Demand Efficiency Narrative**

The On-Demand Efficiency Program (ODE) addresses a method of decreasing the natural gas consumption of central domestic hot water systems with recirculation loops in multifamily buildings while improving occupant satisfaction with the hot water delivery. Demand controls on hot water recirculation systems turn off the recirculation pump when it is not needed, thereby reducing unnecessary heat loss from the loop, reducing the boiler fire time, and thus reducing the natural gas consumption. This program will find these potential sites and install a control that is appropriate, sustainable, and saves natural gas while maintaining comfort for the occupants. A rebate of \$1600 per installed control is available to the customer. Additionally, gas usage on 50 of the hot water systems on which demand control pumps are installed will be monitored. The monitoring results will be used to examine how a building's hot water system configuration interacts with the demand control to affect gas savings and determine what electricity impacts occur due to installation of a demand control.

The second year of the 2010-2012 ODE program was successful. The estimated pump installation goal for 2011 was 370. There were 489 pump installations completed in 2011. Applications are still being accepted resulting in a queue ready for the 2012 program year. As of December 31, 2011 there were 375 site applications awaiting installation.

One major accomplishment for the 2011 program year was the training of 21 additional plumbing companies to install the demand pumps. To help with marketing efforts to find more sites and plumbers, two trade shows were attended, the Apartment Owners Association trade show and the California Apartment Association trade show.

Another program success was the additional 100 pump installations received from the SoCalGas, making the project installation goal 910 pumps. This allowed continued work with the project, expanding the project to new clients, training new plumbers, and allowing the program to save more therms. All 910 pumps completed installation in 2011 exceeding the program's completion goal for 2012.

There were few problems encountered. All customer complaints were either resolved the same day or next day, and the technician made sure the system was working properly and the customer was satisfied with the installation.

## **SCG3665 #3P-Res02 - HERS Rater Training Advancement Narrative**

The Program was conceived to promote, develop, and deliver training to currently certified Home Energy Rating System (HERS) Raters and energy analysts involved in new and retrofit construction of residential housing, from the north end of the SoCalGas service territory, south to the border of Mexico. The Program curriculum addresses both the technical and administrative elements of Home Energy Ratings, and covers current issues and changes, based on Title 24 requirements. One of the primary goals of this program is to improve the consistency of the services provided by the raters. Also, because there are few programs in place to facilitate advanced HERS Rater training on Title 24 while incorporating guidance on emerging

technologies and advanced designs, materials and systems, the baseline is essentially zero. All HERS Raters require advanced training in order to update their skills and knowledge. Few programs offer the comprehensiveness or accessibility of the proposed HERS Rater Training Advancement Program.

In summary, over the life of the program, thirty-two courses will be developed, and will be presented in one hundred and forty-four live class sessions. The multi-media, self-study, online training “academy” was uniquely tailored for SoCalGas, and individually suited for HERS Raters. Activities for the first quarter were focused on refining the processes and enhancing the web-based functionality. During this quarter, all web abilities became fully functional.

In an effort to bolster attendance, the program looked into and implemented offering Continuing Education Units (CEUs) through various organizations to bolster rater/technician interest in this program. In 2011, SoCalGas was able to qualify for NATE CEUs and were working to get more entities to qualify the program for more CEUs.

Marketing the program was a primary focus during the second half of 2011. SoCalGas relied on our partners CHEERS and CalCERTS to e-mail class invitations to all of their rater pool. Early on in the program, this practice seemed very effective and filling the classes was not a concern; however, midway through the year we noticed that very few CalCERTS raters registered or attended classes developed by CHEERS. We worked with our marketing group to place ads in key industry magazines, and develop flyers/handouts for related trade shows. Although these new marketing materials do focus on HERS Raters, they have been designed to appeal to the non-rater community, who qualify to participate in this program as well.

With the variety of subjects that were being developed, securing locations appropriate for each class proved to be a challenge. Locating facilities within the program budget was challenging, however, staff have identified and began working with more than a dozen locations throughout SoCalGas territory. Because of the aggressive production planning for the fourth quarter, the program was able to catch up and meet most of the program goals, despite canceled classes. Some opportunities were lost in the fourth quarter because of the limited instructor availability. The program has been able to identify an additional trainer with CalCerts, which may give them an opportunity to catch up.

CHEERS, was temporarily suspended from submitting work to the State because of reporting and database issues. Despite this, CHEERS has been very active in regards to this program. CHEERS gave consent for us to enter into this direct relationship (on a month-to-month basis) with Doug Beaman Associates until CHEERS can resolve their issues.

In 2011, there were 15 curriculums developed and 54 classes delivered. Evaluation surveys are given to every attendee asking for their ratings on the program, curriculum, and the facility where these classes are held.

## **SCG3666 #3P-Res03 - Multifamily Home Tune-Up Narrative**

Through the Multi-Family Home Tune-up Program, Contractor will help deliver energy savings to multifamily customers located in Orange, San Bernardino, Riverside, and Imperial counties during the 2010-2012 program period.

In 2011 the program successfully met all goals for the year. The program hired three full time, permanent employees based in the Santa Ana, CA area. These employees conduct the installations at the customer locations, and the in-person outreach in the area.

The program has become actively involved in the industry associations (Apartment Association of Orange County, Apartment Association of Greater Inland Empire, and South Coast Apartment Association); increasing awareness of the program and its benefits. Attendance to trade shows and monthly marketing events have yielded a substantial number of leads and enrollments.

The program was approved to begin uploading into the SMART system in October. This delayed start and the following surge in project upload has caused some delays in invoice approval and therm savings reporting. In addition, SoCalGas provided the program a list of customers for outreach purposes. The list, however, does not include many of the business customers or multi-family accounts.

Several changes were made in the program during 2011. The changes included a different management team, the addition of a client account representative, new staff to perform the installations in the field, new staff to promote the program in the region, updated marketing and enrollment pieces, an active presence in the trade associations, and a more aggressive outreach campaign focused on corporate property management customers.

Program achievements were tracked through the total number and type of devices installed at qualified customer locations, and the total number of therm savings represented by the installation of those devices.

## **SCG3667 #3P-Res04 - Multifamily Solar Pool Heating Narrative**

The Multi Family Solar Pool Heating Program aims to encourage large apartment building owners, condominium and homeowners associations as well as property managers to install solar pool heating system for their common area swimming pools

The program did not meet the savings objectives for 2011, based on the Key Performance Indicators (KPIs) that were established for the program to track the program progress and achievements.

Program termination was requested by the contractor in the fourth quarter 2011. Upon this request, SoCalGas prepared and submitted an Advice Letter. The Advice Letter 4301 was approved by the CPUC and the program was terminated on December 23, 2011.

## **SCG3668 #3P-Res05 - Community Language Effic Outreach Narrative**

The Community Language Efficiency Outreach Program (CLEO) is a highly targeted residential energy efficiency marketing, outreach, education and training program specifically targeted to the Vietnamese, Indian, Chinese and Korean (VICK) speaking customers of SCE and SoCalGas. The Program strategy is unique in that it is a 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. In 2009-2011 the program will continue to target the Vietnamese, Indian, Chinese and Korean and will also expand the Program to target the Hispanic (Spanish speaking) and the hard-to-reach, low and medium income customers in the African American Communities.

CLEO continued to establish and maintain strong relationships with community leaders, city mayors and officials, local media, FBO's and non-profit organizations. The outreach through faith-based organizations (FBO's) and local cities were especially successful and effective in 2011. The cooperative outreach effort with the organizations and cities extended CLEO program to the target communities. The Program was featured in Korean and Chinese news media. This helped establish a stronger recognition in the communities.

The Program had the most significant impact on middle to low-income customers who appeared to stronger interests in energy efficiency tips. They also show more interests in the incentives and services offered by the CLEO than higher income customers.

CLEO encountered situations where the customers were not comfortable providing their names, addresses, and phone numbers. Event organizers in some communities were reluctant to allow CLEO to collect customer information at the event. The information is required for the seminar registration and the 5-minute short home energy surveys. As a result, the CLEO could not extend its program offerings to the organizations and the customers.

In 2011 CLEO limited the Senior Center and Adult Day Care Health Centers (ADHC) seminars to a maximum of 10% down from 25%. This was a recommendation by the EM&V on the program and initiated active outreach to Faith Based Organizations (FBO's) and local Cities. This effort was designed to reach out to the untapped churches and demagogues.

## **SCG3669 #3P-Res06 - Multifamily Direct Therm Savings Narrative**

The Multi Family Direct Therm Savings Program (marketed as “*Energy Smart*”) targets owners and managers of multi-unit residential properties such as apartment buildings, off-campus housing, senior housing and mobile home parks. The program encourages participation by providing energy efficient products and installation at no cost to the end use customer. Marketing activities focus primarily on apartment building owners and managers.

The energy-efficient products include: Niagara Earth™ Massage Chrome low flow showerheads (1.5 gpm), Niagara dual spray, low flow kitchen aerators (1.5 gpm), Niagara low flow bathroom aerators (1.0 gpm), and water heater pipe wrap (R value 2.7). In addition to products and

installation, the *Energy Smart* Program provides an assessment of gas appliances at the site along with recommendations for repair or replacement.

Customers were receptive to new marketing strategies implemented which informed apartment managers and owners of the available no cost installation of new energy-efficient devices. The new marketing campaign launched in early 2011 included pop-up ads in an apartment search website, printing an article in an Apartment Owner's Association magazine, and sending program letters to prospective customers. In the midst of one of the worst recessions, property managers, owners, and tenants are enthusiastic about ways to save on their utility bills, while also reducing their carbon footprint.

The *Energy Smart* team provided a high level of customer service, both in the office and in the field. This resulted in favorable customer satisfaction surveys. In 2011, we received an overall satisfaction rating of 9.6 from a total of 97 customers responding to a survey questionnaire generated by Medallia. Both apartment managers and owners were eager to complete the survey and expressed their satisfaction with the overall performance of our staff and their gratitude for being able to participate in such an effective program. There were very few instances where an installation necessitated a follow up site visit by the Honeywell Field Supervisor.

At the end of 2011, Honeywell exceeded their contractual Hard-to-Reach goal of 5% by completing 6.8% in counties outside of Los Angeles.

Challenges in 2011 included the turnaround time to receive approvals and releases from ESAP, sites with low-water pressure, and the ongoing barrier getting access to the decision maker for the site. Fortunately, ESAP was highly responsive when expedited requests were submitted allowing us to move forward with scheduled appointments. Another problem encountered was the high number of customers who canceled with little or no notice.

The major change from 2010 to the pre-approval process continued in 2011. Customer complaints are also tracked through our proprietary data system to ensure that they are addressed and resolved within five business days. This has enabled us to address issues promptly, track resolution, and report them with ease.

### **SCG3670 #3P-Res07 - LivingWise™ Narrative**

LivingWise (LW) is an Elementary and Middle school-delivered residential energy savings program that is currently sponsored through collaboration between SCE and SoCalGas, along with additional water agency funding for more than 50% of program locations. The program is run by Resource Action Programs (RAP) and provides a proven blend of classroom activities and take-home retrofit and audit projects which students complete as homework assignments with their parents and families. Audit data and installation reports are collected via surveys, which are returned to teachers and forwarded to the LW Program Center for tabulation and storage. LW is used at the 6<sup>th</sup> grade level in California to best align with State Learning Standards, and is offered to eligible teachers as an elective program. Teacher enrollment was very high, and overall participant program satisfaction (including parents) was excellent.

The LW Program was successful due to the use of several strategies to meet the defined program objectives:

- The LW program worked with PMs from all partners to build a database of potential schools, assuring eligibility through service account numbers.
- Collaboration with local electric utilities and water agencies resulted in establishment of partnerships to fund and expand educational objectives. This cost sharing between local partners allowed LW to exceed enrollment targets with the 2011 budget.
- The program staff's continued dialog with the utility program managers PM, providing an implementation plan and timeline, regular telephone meetings for status, and avoidance of issues that would impact delivery commitments.

One of the biggest challenges for LW to overcome was acquiring account numbers and the continued building of an eligible list of schools for outreach. This requires a continued effort by both SoCalGas and SCE to provide validated account numbers for schools as new candidates are identified. As account numbers were received from SoCalGas and SCE, schools were uploaded to the LW's program application enabling LW to plan and implement enrollment activities to achieve participation goals.

Promoting widespread LW Program coverage and directly relating to the LW school list is the Key Performance Indicator (KPI) goal of 50 percent of all enrollments being "new" each year. New defined as any eligible school – SCE and SoCalGas service account number – having never participated in LW or not within the prior two calendar years. While documented in the SCE contract this KPI is supported by SoCalGas, thus promoting a need for school list growth.

A component of the LW teacher materials is a program evaluation. This feedback in combination with input from several focus groups indicated an opportunity for LW improvement. Specifically, improved layout and reduction of *Workbook* required calculations would improve the diversity of appeal. Additionally, SCE's Workforce Education and Training (WE&T), incorporating CPUC's objectives requested addition of age appropriate content for the introduction of careers in energy or natural resources (green jobs). Resource Action Programs addressed each of these three areas through material revision. This included the addition of *Connecting it all*, an addition in each section that includes an introduction to a related green career. Revised materials were introduced in the fall 2011 school session.

The program exceeded program energy savings and installation forecasts.

### **SCG3671 #3P-Res09 - Manufactured Mobile Home Narrative**

The Manufactured Mobile Home Program is designed to provide energy efficient gas measures on a comprehensive basis to manufactured mobile home customers in the SoCalGas service territory. These energy efficient gas measures include duct test & seal, pipe wrap, faucet aerators and low flow showerheads.

The solid infrastructure, marketing strategies and certified crews have resulted in steady production levels and strong overall program performance, which Synergy fully expects to continue throughout the 2010-2012 program cycle.

The Synergy program team continues to regularly work through and adjust finding, scheduling, installation and inspection processes. The business plan is supported by the marketing and outreach staff, who continue to schedule, prepare and distribute direct mail pieces, as well as distribute flyers to generate interest and attendance at follow-up neighborhood meetings. In addition to direct mail efforts, the marketing and outreach personnel diversify their efforts to personally canvass mobile home parks door to door to increase program interest and saturation.

No changes have been made to this program contract; however, when production goals were set, this program included a shared Duct Test and Seal Measure, which offered the SoCalGas Manufactured Mobile Home Program therm savings at a lower cost per therm, as the cost of the measure was previously shared with SCE. With the removal of this measure from SCE's program, we are also seeing a slightly higher average cost per therm overall, which has lowered the anticipated percentage of goal based on revenue production.

Also, the program administration team regularly adjusts staffing levels, including administrative personnel, outreach personnel and technicians, to meet current budget and production goals. Synergy has focused efforts in the cooler climate zones during the second and third quarters of 2011, which provide modest energy savings in comparison with the hotter climate zones.

The program is on track to achieve program energy savings and installation goals. Program achievements are tracked by monthly uploads into the SMART System with corresponding monthly detailed invoices, monthly narrative program reports, monthly program-to-date achievement reports, quarterly narrative program reports and annual narrative program reports.

### **SCG3672 #3P-Xc01 - Gas Cooling Retrofit Narrative**

This Program encourages customers in the SoCalGas service territory to purchase and retrofit inefficient gas cooling units by offering information on the newer technology and incentives for gas cooling units up to 100 tons in size. Gas cooling units are installed in some homes and small businesses throughout the SoCalGas service territory. These units are older, often not maintained well and may fail soon, so customers may choose to enter the market and replace the units. However, they also can replace their cooling needs with other technology options such as electric cooling and often choose that path instead.

This program works to provide incentives (\$1.00/therm) for the replacement of these old existing units and transition to new higher efficiency gas AC equipment instead of alternative technologies. The program also works with the delivery channel to provide training on gas cooling and attempts to recreate and improve the delivery channel for gas cooling. The program continued to work with manufacturers and distributors and contractors to expand the opportunity to identify potential program participants and potential customers.

There is a need for an identified usable existing data base (valid customer names/addresses, tonnage installed, contractor, etc) of current gas air conditioning customers. This is needed to help target the specific customers who could benefit from replacement. A related issue is the need to re-build the contractor's confidence in selling gas units. Additionally the lack of a new construction opportunity or program unit size limits contractor enthusiasm for gas cooling.

The feedback we have received regarding the rebate indicated that it is too low to motivate contractors and users. In addition there are always concerns regarding South Coast Air Quality Management District (SCAQMD) Rules that may impact the sale and installation of gas cooling equipment. However, Rule 219 does now allow for equipment with burner inputs less than 2,000,000 BTUH are exempt from permitting. Another change is an increased focus on outreach and training to the market channel contractors and distributors of gas and hydronic equipment.

The program did not achieve the therm goals primary due to a lack of identified eligible customers. The savings goals have not been met.

### **SCG3673 #3P-Xc02 - SaveGas – Hot Water Control Narrative**

This program addresses gas savings in SoCalGas service territory by implementing domestic hot water (DHW) control systems in hotels, motels, resorts and senior care facilities plus other associated hot water end uses (e.g. on-site kitchen and laundry facilities). A typical equipment arrangement consists of a hot-water storage tank, a hot-water boiler which includes a circulation pump, a loop or network of piping to supply the heated domestic hot water to the facilities guest rooms / dwelling units, and a recirculation pump on the return line from the piping loop.

To date our success has largely been attributed to our top down selling approach, in which we work closely with the facility owner to establish value and elevate the technology from a simple savings technology to an integral component within the facilities infrastructure management. The program is most successful when a test is implemented and savings are proven to the client before signing of contract. The program has been very successful showing savings with immediate return to the client. In doing tests customized to each application we can give the client the best scenario for their application.

The program is behind on its goals for 2011, this is mostly due to a weak economy and low gas prices.

### **SCG3674 #3P-Xc03 - Upstream High Efficiency Gas Water Heater Narrative**

The Program for Upstream High Efficiency Gas Water Heater will provide comprehensive services to establish and maintain an upstream rebate system, (i.e. distributors/wholesalers) to reduce or altogether remove the price differential between the standard and high-efficiency gas water heaters in SoCalGas service territory. The primary objective of the program is to support and complement SoCalGas existing Single Family Residential Energy-Efficiency Rebate Resource Program by stimulating plumber and contractor participation in energy efficiency

rebates. This program is to be implemented for replacement market only and only storage gas water heaters, 40 or 50 gallons with an Energy Factor of 0.62 or higher, will qualify.

The success of the water heater rebate program comes from the relationships that had previously been formed with the distributors. The water heater rebate program struck a major barrier when the economy started to decline. It seemed that many homeowners didn't have the money to spend on replacing their water heaters. Additionally, many wholesalers are not necessarily receptive to or trusting in the idea of a "no-cost" rebate program. It has been difficult to convince some distributors that this is in fact a legitimate program.

In 2011, the marketing outreach had to be stepped up to ensure that the goals were reached, despite the poor economy. Also, in 2011, the program goals were reduced to a more manageable level. In July SoCalGas alerted Matrix that two KPIs were falling short of the goals outlined in the contract, namely:

- Total number of rebated units missed goal by more than 15%
- Overdue invoices exceeded tolerance.

SoCalGas requested a corrective action plan, which Matrix generated to get these KPIs back on track. The expected number of rebated units per quarter was reduced to 6,501. Matrix is awaiting the contract changes to reflect this new number and a lower budget.

The program did meet the new established goals for 2011, and continues to market in an effort to exceed those goals.

### **SCG3675 #3P-Xc04 - California Sustainability Alliance Narrative**

The California Sustainability Alliance (Alliance) Program is designed to increase and accelerate adoption of energy efficiency by packaging it with complementary "sustainability" measures (i.e., energy and water use efficiency, renewable energy, waste management, and transportation management). The scope includes multiple activities dedicated towards (1) building demand for energy efficiency and environmental sustainability; (2) advancing and promulgating the body of sustainability best practices, tools and techniques; (3) leveraging the collective resources of all partners - public and private; local, state and federal; and (4) developing educational and outreach materials to widely disseminate the body of emerging and existing best practices.

Through 2011, the Alliance has addressed four broad program areas: Green Local Government, Green Buildings, Water Energy, and Multifamily Housing. The Alliance has executed a number of successful strategies across the four program areas:

- The **Green Local Government** program developed three best-practice videos featuring the city of Santa Monica. Two activities were initiated with San Luis Obispo. A review of their Climate Action Plan was conducted and a memorandum of findings delivered. In addition, the Alliance developed a partnership with Santa Barbara for a retro-

commissioning project, focusing on the four government entities within the Santa Barbara Local Government Partnership.

- The **Green Buildings** program component continued to develop a series of website features on the Alliance’s Advisors’ organizations including Cradle to Cradle and Thomas Properties Group. The Alliance released the green building video documentary entitled “The Competitive Edge” maintained the Green Building Barometer data, and created a work scope to develop a green retail initiative.
- The **Water Energy** program component completed and launched the revised Water Energy program section content.
- The **Multifamily** program continued development of a white paper on smart growth and delivered work scope for solar hot water initiative for multifamily properties.

In addition to the successful strategies implemented within the four program areas, the Alliance advanced energy efficiency through the Sustainability Forum and Sustainability Showcase Awards:

The Alliance works through partnerships with client organizations to provide support in their sustainability efforts and document these efforts through case studies and tools that others may use. During 2011, recruiting partner organizations was challenging because many potential partners have trimmed their staff because of the economy, making expenditures of time and funds on sustainability efforts second to base load operations.

During 2011, there was considerable uncertainty as to the continued funding of SoCalGas energy efficiency programs. In order not to expend unnecessary resources, the Alliance did not seek out ideas for new barriers and opportunities from their advisors until the funding issues were resolved. As a result, the generation of new initiatives was delayed by several months.

During 2011, the Alliance redoubled its efforts in the area of local governments to take advantage of the synergistic opportunities presented through the SoCalGas local government partnerships. The partnerships opened up channels of communication to local governments striving to make advancements in energy efficiency and sustainability. Through the partnerships’ focus on energy efficiency, these dialogues identified other areas where the local governments were struggling to meet broader AB 32 or climate action plan targets.

The program’s achievements are tracked in the California Sustainability Alliance’s monthly and quarterly reports.

### **SCG3676 #3P-Xc05 - Portfolio of the Future (PoF) Narrative**

The Portfolio of the Future (POF) is a non-resource program aimed at filling the gap between existing technology offerings (i.e., measures) in SoCalGas portfolio and new, emerging technologies. POF identifies and evaluates emerging natural gas efficiency technologies and new business models to identify candidate natural gas applications in all sectors (agricultural and urban; residential, commercial, industrial and institutional) for possible inclusion in SoCalGas portfolio. In 2011, POF continued to identify and evaluate new technologies for development of

additional pilot programs and completed rescanning activities, including review of over 600 technologies. As part of this effort, the POF team identified 6 priority emerging technologies with potential for portfolio inclusion and 2 major market sector studies to identify key market sector sub-segments and applicable emerging technologies that could best be marketed to those segments

During 2011, POF also continued to advance and assess new technologies and program approaches that are being considered for inclusion in SoCalGas energy efficiency portfolio, including:

- Supporting Emerging Technologies Program (ETP) staff on overall emerging technology project initiation and design, with a goal of transforming technologies into program measures for SoCalGas.
- Helping market four commercial laundry technologies for which Program Readiness Packages have been submitted.
- Completing a full cycle technology scanning process and presented the results of 6 priority technologies for further study.
- Delivering a draft report on a pilot study of cold water default washers, in partnership with General Electric and SDG&E.
- Completing and delivering a market and technology assessment of two residential storage water heating technologies that meet SCAQMD's pending NOx requirements.
- Initiating 250 on-site residential water heating surveys with the goal of understanding: installed base of technologies, typical construction practices in the SoCalGas territory that impact water heating, the technical potential for emerging water heating efficiency technologies and customer feedback on what they'd like to see in utility programs.
- Using the recommendations of 2010's Commercial Water Heater and Boiler Working Group, we initiated two market and technology assessments. The first was on time clocks for recirculation pumps in commercial buildings and the second was on waste heat recovery for water heating from refrigeration and A/C systems in supermarkets.
- Initiating two industrial segment specific studies. The first was a study to understand the major uses of natural gas in SoCalGas' biggest industries, along with the potential for emerging technologies. The second study is to assess the potential for net zero energy facilities in these industries and to create roadmaps to get to net zero energy or as close as possible.

Connections to programmatic activities have been strengthened over the past year, improving our ability to move promising technologies to programs. However, there are still some cases where a promising technology fails to make the transition to programs or their status is unknown. At SoCalGas request, the program began to identify high potential nascent technologies. The program integrated this approach into our scan process and delivered a report to SoCalGas on our process and identified 6 promising nascent technologies.

The primary indicator of POF program success is the number of new technologies that are brought into SoCalGas energy efficiency portfolio and their estimated incremental savings potential. Technologies recommended by POF and selected by SoCalGas ET for inclusion in its

energy efficiency portfolio are documented through *Program Ready Packages* comprised of three elements: a) a “mini-business plan”; b) a one-page situational analysis; and c) a technical paper that provides the basic technological measurements and information that will be submitted, as appropriate, to the CPUC, along with other information needed to include the new technology in the SoCalGas Portfolio. Starting in 2011, we added indicators aligning with the CPUC’s CLTEESP, which includes conducting market assessments and consumer behavior studies.

### **SCG3677 #3P-Xc06 - PACE Energy Savings Project Narrative**

The PACE Energy Savings Project (PACE) is a multi-ethnic outreach program that actively promotes the energy efficiency programs of SoCalGas to residential and small business customers who belong to the Chinese, Korean, Hispanic, and Vietnamese communities. In 2010-2012, the program proposes to expand its outreach to the Filipino community and other geographical areas including Orange, Riverside, San Bernardino, and Ventura Counties. In addition, the program will take its outreach efforts to “the next level” by encouraging target small businesses to take more concrete steps to saving energy as well as conducting follow-through and follow-up activities to determine the extent to which customers practiced or employed energy savings in their homes or work places.

PACE completed the majority of its goals and assigned tasks during the year. Credit to this success can be attributed directly to PACE fielding outreach specialists that:

- Brought the information directly to the members of the target community—facilitating access to the programs;
- Conducted seminars/presentations and other outreach activities in the native language that target community members are comfortable in;
- Coordinated with formal and informal leaders of the community, whose endorsements not only lent credibility to the outreach, but also encouraged members to actively participate and practice energy savings at home and at work.

As more members of the target communities grasped the value of the programs through these in language outreach activities, it became easier to convince other members to also participate. Word-of-mouth endorsement, a deep-seated method of communication among ethnic communities, from those that have benefited from the program further helped push up the community members’ participation levels. The generous exposure of the program in ethnic media also widened the program’s outreach among its target communities. The program’s use of mainstream, alternative, and ethnic mass media assisted in widening the dissemination of the benefits derived from participating in the energy saving programs of SoCalGas.

PACE tracks program accomplishments on a daily, weekly, monthly and quarterly basis. PACE submits regular monthly reports that detail program completions and accomplishments. Quarterly reports also provide a three-month summary of the program’s achievements. From time to time, PACE also submits special reports, as requested.

PACE utilizes a pre-programmed electronic database tracking documentation system to monitor level of task completions against established targets or goals. Completions are recorded when the completed and signed forms, as well as supporting documents, are submitted, reviewed, processed and approved by SoCalGas.

## **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 2011 year. The annual impacts are reported for each year of the program cycle beginning in 2006 in terms of annual and lifecycle 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 Efficiency Program and pre- 2006 Codes and Standards advocacy work (LIEE and C&S savings are broken out as separate line items in Table 8 - Savings by End-Use).

Table 1

Table 1.  
Electricity and Natural Gas Savings and Demand Reduction (Gross)

Annual Results	Installed Savings	CPUC Adopted in D. 04-09-060 Goal (Year)	% of Goals (Year)	% of 3-year Goals (Portfolio)	Balance
<b>2010 Energy Savings (GWh) – Annual</b>		<b>3</b>			
SCG		3			
<b>2011 Energy Savings (GWh) – Annual</b>		<b>10</b>			
SCG		10			
<b>2012 Energy Savings (GWh) – Annual</b>		<b>-</b>			
SCG		-			
<b>TOTAL Energy Savings (GWh) - Annual</b>		<b>14</b>			
<b>2010 Energy Savings (GWh) – Lifecycle</b>		<b>59</b>			
SCG		59			
<b>2011 Energy Savings (GWh) – Lifecycle</b>		<b>175</b>			
SCG		175			
<b>2012 Energy Savings (GWh) – Lifecycle</b>		<b>-</b>			
SCG		-			
<b>TOTAL Energy Savings (GWh) – Lifecycle</b>		<b>59</b>			
<b>2010 Natural Gas Savings (MMth) – Annual</b>		<b>28</b>			
SCG		28			
<b>2011 Natural Gas Savings (MMth) – Annual</b>		<b>62</b>			
SCG		62			
<b>2012 Natural Gas Savings (MMth) – Annual</b>		<b>-</b>			
SCG		-			
<b>TOTAL Natural Gas Savings (MMth) – Annual</b>		<b>89</b>			
<b>2010 Natural Gas Savings (MMth) – Lifecycle</b>		<b>375</b>			
SCG		375			
<b>2011 Natural Gas Savings (MMth) – Lifecycle</b>		<b>856</b>			
SCG		856			
<b>2012 Natural Gas Savings (MMth) – Lifecycle</b>		<b>-</b>			
SCG		-			
<b>TOTAL Natural Gas Savings (MMth) – Lifecycle</b>		<b>1,231</b>			
<b>2010 Peak Demand savings (MW)</b>		<b>2</b>			
SCG		2			
<b>2011 Peak Demand savings (MW)</b>		<b>8</b>			
SCG		8			
<b>2012 Peak Demand savings (MW)</b>		<b>-</b>			
SCG		-			
<b>TOTAL Peak Demand savings (MW)</b>		<b>10</b>			

The energy savings and other cost-effectiveness parameters for many measures contained in this report, and its supporting documentation, are preliminary since the Energy Division review of SoCalGas' workpapers is yet to be completed. SoCalGas is working closely with the Energy Division and their consultants to complete this process in the near future.

## **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 2011 program year. Parties agreed that the impacts should be in terms of annual and lifecycle tons of CO<sub>2</sub>, NO<sub>X</sub>, SO<sub>X</sub>, and PM<sub>10</sub> avoided and should come from the E3 calculator.

Table 2

**Table 2**  
*Environmental Impacts(Gross)*

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 SOx avoided <sup>1</sup>	Lifecycle tons of SOx avoided <sup>1</sup>	Annual tons of PM10 avoided	Lifecycle tons of PM10 avoided
<b>2010 - 2012 Portfolio</b>								
<i>Targets</i>								
<b>2010 Total</b>	<b>149,360</b>	<b>2,051,870</b>	<b>141</b>	<b>1,987</b>	<b>-</b>	<b>-</b>	<b>0</b>	<b>3</b>
SCG	149,360	2,051,870	141	1,987	-	-	0	3
<b>2011 Total</b>	<b>200,745</b>	<b>2,871,976</b>	<b>191</b>	<b>2,811</b>	<b>-</b>	<b>-</b>	<b>0</b>	<b>4</b>
SCG	200,745	2,871,976	191	2,811	-	-	0	4
<b>2012 Total</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
SCG	-	-	-	-	-	-	-	-
<b>Total for 3-year Portfolio</b>	<b>350,104</b>	<b>4,923,846</b>	<b>332</b>	<b>4,797</b>	<b>-</b>	<b>-</b>	<b>0</b>	<b>7</b>

The energy savings and resulting emission reductions for many measures contained in this report, and its supporting documentation, are preliminary since the Energy Division review of SoCalGas' workpapers is yet to be completed. SoCalGas is working closely with the Energy Division and their consultants to complete this process in the near future.

## **SECTION 3 EXPENDITURES**

The purpose of this table is to report the annual costs expended by SoCalGas in implementing the 2011 Energy Efficiency portfolio. The report shows the “Total Portfolio Expenditures” broken out into Administrative Costs, Marketing/Advertising/Outreach Costs, and Direct Implementation Costs for the entire portfolio; the next two sets of expenditures represent sub-components of the portfolio already included in the Total Portfolio Expenditures totals: 1. Total Competitive Bid Program Expenditures (sub-component of portfolio), and 2. Total Partnerships (sub-component of portfolio). The last component is “Total EM&V” (separate from portfolio) expenditures will be reported for the IOU and Joint Staff.

Table 3

**Table 3**  
2010 - 2012 Expenditures

Summary of Portfolio Expenditures	2010 - 2012 Budget	Cumulative Annual Expenditures	Percent of Portfolio Budget (3-yr)	Percent of Total Annual Expenditures
<b>Total Portfolio Expenditures</b>				
Administrative Costs		10,974,101	3.85%	10.18%
Marketing/ Advertising/ Outreach Costs		10,140,901	3.56%	9.41%
Direct Implementation Costs		86,674,495	30.41%	80.41%
<b>Total Portfolio Expenditures</b>	<b>\$ 284,999,996</b>	<b>107,789,497</b>	<b>37.82%</b>	<b>100.00%</b>
<i>Total Competitive Bid Program Expenditures (sub-component of portfolio)</i>				
Administrative Costs		486,835	0%	0%
Marketing/ Advertising/ Outreach Costs		5,370,709	2%	5%
Direct Implementation Costs		21,291,000	7%	20%
<b>Total Competitive Bid Program Expenditures</b>		<b>27,148,544</b>	<b>9.53%</b>	<b>25.19%</b>
<i>Total Partnership Program Expenditures (sub-component of portfolio)</i>				
Administrative Costs		1,218,213	0%	1%
Marketing/ Advertising/ Outreach Costs		679,386	0%	1%
Direct Implementation Costs		1,234,050	0%	1%
<b>Total Partnership Program Expenditures</b>		<b>3,131,649</b>	<b>1.10%</b>	<b>2.91%</b>
<b>Total EM&amp;V Expenditures (separate from portfolio)</b>				
EMV IOU	\$ 1,600,680	810,888	50.66%	58%
EMV JOINT STAFF	\$ 4,802,040	575,887	11.99%	42%
<b>Total EM&amp;V Expenditures</b>	<b>\$ 6,402,720</b>	<b>1,386,775</b>	<b>21.66%</b>	<b>100.00%</b>

## **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 2011 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

Table 4  
Cost Effectiveness (Net)

Annual Results	Total Cost to Billpayers (TRC)	Total Savings to Billpayers (TRC)	Net Benefits to Billpayers (TRC)	TRC Ratio	Total PAC Cost	PAC Ratio	PAC Cost per kW Saved (\$/kW) <sup>1</sup>	PAC Cost per kWh Saved (\$/kWh)	PAC Cost per therm Saved (\$/therm)
<b>2010 - 2012 TARGETS</b>									
<b>Average per year</b>									
SCG	\$ 196,548,709	\$ 267,573,760	\$ 71,025,051	1.36	\$ 104,627,774	2.56	N/A	N/A	\$0.35 /therm
<b>[Utility] TOTAL</b>	<b>\$ 196,548,709</b>	<b>\$ 267,573,760</b>	<b>\$ 71,025,051</b>						

Footnote 1: The adopted avoided cost methodology does not provide information to provide a meaningful value for PAC Cost per kW. The adopted avoided cost methodology created kWh costs values that vary for each hour of the year that includes kW generation capacity costs. The current PAC Cost per kWh includes all ratepayer financial costs incurred in producing electric savings. The same costs would have to be reallocated if a PAC Cost per kW were presented. Additionally, the current approved calculator does not have the capability to calculate discounted kW, nor is it clear whether an annualized cost per kW or total cost per kW is more useful.

The energy savings and other cost-effectiveness parameters for many measures contained in this report, and its supporting documentation, are preliminary since the Energy Division review of SoCalGas' workpapers is yet to be completed. SoCalGas is working closely with the Energy Division and their consultants to complete this process in the near future.

## **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, as required by Rule X.3 of the Energy Efficiency Policy Manual version 3, adopted in D.05-04-051.

## Table 5

---

**Table 5**  
*Ratepayer Impacts*

<b>2010 - 2012</b>	<b>Electric Average Rate (Res and Non-Res) \$/kwh</b>	<b>Gas Average Rate (Core and Non-Core) \$/therm</b>	<b>Average First Year Bill Savings (\$)</b>	<b>Average Lifecycle Bill Savings (\$)</b>
SCG		NA	\$ 39,765,673	\$ 546,886,634
<b>[Utility] Average</b>				

## **SECTION 6 GREEN BUILDING INITIATIVE**

The purpose of this table is to record the amount of savings attributable to California's 2011 Energy Efficiency portfolio that contribute to meeting the Governor's Green Building Initiative Goal of reducing energy use in state-owned buildings by 20 per cent by 2015 (with a 2003 baseline). Expenditures are for program activities that contribute towards GBI goals. Annual GWH, MW, and Million therms are cumulative net values.

Table 6

---

<b>Table 6</b>										
<i>Green Building Initiative - State Buildings Only</i>										
2011	<b>Expenditures</b>	<b>GWH</b>			<b>MW</b>			<b>MMth</b>		
		Goal	Annual	% of Goal	Goal	Annual	% of Goal	Goal	Annual	% of Goal
SCG	\$ 450,624								0.74902	

The energy savings and other cost-effectiveness parameters for many measures contained in this report, and its supporting documentation, are preliminary since the Energy Division review of SoCalGas' workpapers is yet to be completed. SoCalGas is working closely with the Energy Division and their consultants to complete this process in the near future.

## **SECTION 7**

# **SHAREHOLDER PERFORMANCE INCENTIVES**

The tables for the 2011 shareholder performance incentive have not yet been determined by the Commission. Therefore, there is no information presented in this report.

## **SECTION 8 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 LIEE program, the Codes and Standards pre-2006 advocacy work.

Table 8

**Table 8**  
*Annual Savings By End-Use 2011*

	GWH	% of Total	MW	% of Total	MMTh = 1,000,000	
					therms	% of Total
<b>Residential</b>	-				7	19.41%
Appliances					-	0.00%
Consumer Electronics					-	0.00%
Cooking Appliances					-	0.00%
HVAC					1	3.21%
Lighting					-	0.00%
Pool Pump					-	0.00%
Refrigeration						0.00%
Water Heating					6	16.20%
Other					-	0.00%
<b>Nonresidential</b>	-				23	60.96%
HVAC					4	11.70%
Lighting					-	0.00%
Office						0.00%
Process					10	26.30%
Refrigeration					-	0.00%
Other					9	22.96%
<b>Low Income Energy Efficiency</b>					4	11.49%
<b>Codes &amp; Standardss Energy Savings</b>					3	8.14%
<b>SOCALGAS ANNUAL PORTFOLIO SAVINGS</b>	-		-		38	100.00%

The energy savings and other cost-effectiveness parameters for many measures contained in this report, and its supporting documentation, are preliminary since the Energy Division review of SoCalGas' workpapers is yet to be completed. SoCalGas is working closely with the Energy Division and their consultants to complete this process in the near future.

## **SECTION 9 COMMITMENTS**

The purpose of this table is to allow the utilities to report commitments for both the near term (installed savings will be produced within the 2011 program year and long term (commitments entered into during the current program cycle but which are not expected to produce installed savings until after December 2011). 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 9

---

**Table 9**  
*Commitments*

Commitments Made in the Past Year with Expected Impelmentation by December 2011				
2011	Committed Funds \$	Expected Energy Savings		
		GWH	MW	MMth
<b>SCG Total</b>	N/A	N/A	N/A	N/A
Commitments Made in the Past Year with Expected Impelmentation <i>after</i> December 2011				
2011	Committed Funds \$	Expected Energy Savings		
		GWH	MW	MMth
<b>SCG Total</b>	N/A	N/A	N/A	N/A

## Appendix A – SoCalGas Program Numbers

Program ID	Program Name	Date Added (new programs)	Date Removed
SCG3600	#Local02 - Local Whole Home Performance		
SCG3601	#Local05 - Local Non-Residential BID		
SCG3602	#SW-AgA - Calculated		
SCG3603	#SW-AgB - Deemed		
SCG3604	#SW-AgC - Nonresidential Audits		
SCG3605	#SW-AgD - Pump Test & Repair		
SCG3606	#SW-AgE - Continuous Energy Improvement		
SCG3607	#SW-ComA - Calculated		
SCG3608	#SW-ComB - Deemed		
SCG3609	#SW-ComC - Nonresidential Audits		
SCG3610	#SW-ComD - Continuous Energy Improvement #SW-ComE - Direct Install		
SCG3611	#SW-IndA - Calculated		
SCG3612	#SW-IndB - Deemed		
SCG3613	#SW-IndC - Nonresidential Audits		
SCG3614	#SW-IndD - Continuous Energy Improvement		
SCG3615	#SW-ResA - Multifamily EE Rebates		
SCG3616	#SW-ResB - Home Efficiency Rebates		
SCG3617	#SW-ResC - Home Efficiency Energy Survey		
SCG3618	#SW-ResD - Prescriptive Whole House Retrofit		
SCG3619	#L-InstP01 - CA Depart of Corrections Partnership		
SCG3620	#L-InstP02 - CA Community College Partnership		

<b>Program ID</b>	<b>Program Name</b>	<b>Date Added (new programs)</b>	<b>Date Removed</b>
SCG3621	#L-InstP03 - UC/CSU/IOU Partnership		
SCG3622	#L-InstP04 - State of California /IOU Partnership		
SCG3623	#SW-ME&OB - SW Marketing, E&O FYP		
SCG3624	#SW-ETA - Assessments		
SCG3625	#SW-NCNR - NRNC Savings By Design		
SCG3626	#SW-NCResA - RNC #SW-NCResA - Energy Star Manufactured Homes		
SCG3627	#SW-WE&TA - Strategic Planning & Implementation		
SCG3628	#SW-WE&TB - WE&T Centers		
SCG3629	#SW-WE&TC - WE&T Connections		
SCG3630	#LGovP01 - LA County IOU Partnership		
SCG3631	#LGovP02 - Kern County Energy Watch Partnership		
SCG3632	#LGovP03 - Riverside County Partnership		
SCG3633	#LGovP04 - San Bernardino County IOU Partnership		
SCG3634	#LGovP05 - Santa Barbara County IOU Partnership		
SCG3635	#LGovP06 - SBCCOG Partnership		
SCG3636	#LGovP07 - San Luis Obispo County Partnership		
SCG3637	#LGovP08 - Tulare Cnty-Visalia Energy Watch Prtnr		
SCG3638	#LGovP09 - Orange County Cities Partnership		
SCG3639	#LGovP10 - ILG IOU Partnership		
SCG3640	#LGovP11 - Community Energy Partnership		
SCG3641	#LGovP12 - Desert Cities Partnership		
SCG3642	#LGovP13 - VCREA Sub-Program Partnership		

<b>Program ID</b>	<b>Program Name</b>	<b>Date Added (new programs)</b>	<b>Date Removed</b>
SCG3643	#LGovP14 - Palm Desert IOU Pilot Partnership		
SCG3644	#Local01 - OBF		
SCG3645	#Local03 - Local Sustainable Communities (RMV)		
SCG3646	#Local04 - Local Strategic Develop & Integ		
SCG3647	#SW-C&SA - Building Standards Advocacy		
SCG3648	#SW-C&SB - Appliance Standards Advocacy		
SCG3649	#SW-C&SC - Compliance Training		
SCG3650	#SW-C&SD - Reach Codes		
SCG3651	#SW-HVACA - Residential Energy Star Quality Installation		
SCG3652	#SW-HVACB - Commercial Quality Installation		
SCG3653	#SW-HVACC - Commercial Upstream Equipment		
SCG3654	#SW-HVACD - Quality Maintenance Program		
SCG3655	#SW-HVACE - Technology & Systems Diagnostics		
SCG3656	#SW-HVACF - HVAC WE&T		
SCG3657	#SW-HVACG - HVAC Core		
SCG3658	#SW-IDSM - SW Integrated DSM		
SCG3659	#SW-ME&OC - ME&O Strategic Plan		
SCG3660	#3P-NRes1 - Steam Trap and Compressed Air Survey		
SCG3661	#3P-NRes2 - Energy Challenger		
SCG3662	#3P-NRes3 - Small Industrial Facility Upgrades		
SCG3663	#3P-NRes4 - Program for Resource Efficiency in Private Schools		
SCG3664	#3P-Res01 - On Demand Efficiency		
SCG3665	#3P-Res02 - HERS Rater Training Advancement		

<b>Program ID</b>	<b>Program Name</b>	<b>Date Added (new programs)</b>	<b>Date Removed</b>
SCG3666	#3P-Res03 - Multifamily Home Tune-Up		
SCG3667	#3P-Res04 - Multifamily Solar Pool Heating		12/23/2011
SCG3668	#3P-Res05 - Community Language Effic Outreach		
SCG3669	#3P-Res06 - Multifamily Direct Therm Savings		
SCG3670	#3P-Res07 - LivingWise™		
SCG3671	#3P-Res09 - Manufactured Mobile Home		
SCG3672	#3P-Xc01 - Gas Cooling Retrofit		
SCG3673	#3P-Xc02 - SaveGas – Hot Water Control		
SCG3674	#3P-Xc03 - Upstream High Efficiency Gas Water Heater		
SCG3675	#3P-Xc04 - California Sustainability Alliance		
SCG3676	#3P-Xc05 - Portfolio of the Future (PoF)		
SCG3677	#3P-Xc06 - PACE Energy Savings Project		

## Appendix B – Updated Monthly Report

---

\* In accordance with R.09-11-014 issued on December 22, 2011, Attachment B, II.a., “The following reports are no longer submitted by the utilities in 2010-2012: E3 output sheets, Quarterly Narratives, and Quarterly Spreadsheets.” Updated Quarterly Spreadsheets are not included in this report.



**Southern California Gas Company**  
**2010-2012 Monthly Energy Efficiency Program Report**  
**Report Month: December 2011**

**Table 1.2: 2010-2012 IOU Portfolio Costs**

2010-2012 Adopted Portfolio Budget	\$ 284,999,996
Portfolio Expenditures (Inception-To-Date)	\$ 109,422,904
Portfolio Expenditures (Report Month)	\$ 11,367,218
Portfolio Commitments (Inception-To-Date)	\$ -

**Table 1.3: 2010-2012 IOU Portfolio Cumulative (2006-2012) Impacts**

	Cumulative Goals (D.09-09-047)			Cumulative Installed Savings (Inception-to-Date)			Cumulative Installed Savings (% of Cumulative Goals)		
	2010	2011	2012	2010	2011	2012	2010	2011	2012
<b>Energy Savings (Gross Annual kWh)</b>									
2006-2008 Evaluated Energy Savings [1]									
2009 Evaluated Energy Savings [2]									
50% Credit For EUL Decayed Energy Savings [3]									
2010-2012 Portfolio Energy Savings									
<b>Subtotal Energy Savings</b>									
<b>Demand Reduction (Gross Summer Peak kW)</b>									
2006-2008 Evaluated Energy Savings [1]									
2009 Evaluated Energy Savings [2]									
50% Credit For EUL Decayed Energy Savings [3]									
2010-2012 Portfolio Energy Savings									
<b>Subtotal Energy Savings</b>									
<b>Gas Savings (Gross Annual Therms)</b>									
2006-2008 Evaluated Energy Savings [1]									
2009 Evaluated Energy Savings [2]									
50% Credit For EUL Decayed Energy Savings [3]									
2010-2012 Portfolio Energy Savings									
<b>Subtotal Energy Savings</b>									

- [1]
- [2]
- [3]

**Table 1.4: 2010-2012 IOU Portfolio Impacts - Annual**

	Annual Goals (D.09-09-047)			Annual Installed Savings (Year-to-Date)			Annual Installed Savings (% of Annual Goals)		
	2010	2011	2012	2010	2011	2012	2010	2011	2012
Energy Savings (Gross Annual kWh)	-	-	-				0%	0%	0%
Demand Reduction (Gross Summer Peak kW)	-	-	-				0%	0%	0%
Gas Savings (Gross Annual Therms)	28,000,000	30,000,000	32,000,000	27,413,193	37,905,131		98%	126%	0%

**Table 1.5: 2010-2012 IOU Portfolio Impacts - Aggregated End Use**

	Energy Savings (Gross Annual kWh)	Demand Reduction (Gross Summer Peak kW)	Gas Savings (Gross Annual Therms)
<b>Residential</b>	10,608,742	7,969	15,117,855
Appliances	-	-	-
Consumer Electronics	-	-	-
Cooking Appliances	-	-	-
HVAC	7,555,539	6,744	2,419,140
Lighting	-	-	43
Pool Pump	-	-	-
Refrigeration	-	-	-
Water Heating	3,053,203	1,225	12,698,672
Other	-	-	-
<b>Nonresidential</b>	(1)	0	38,474,568
HVAC	-	-	5,881,285
Lighting	-	-	-
Office	-	-	-
Process	(1)	0	16,606,340
Refrigeration	-	-	-
Other	-	-	15,986,943
<b>Low Income Energy Efficiency</b>	-	-	6,394,892
<b>Codes &amp; Standards</b>	-	-	5,331,009
<b>Total Energy Efficiency Portfolio</b>	<b>10,608,741</b>	<b>7,969</b>	<b>65,318,324</b>

Program impacts reflect inception-to-date activity.

**Table 1.6: 2010-2012 IOU Portfolio Impacts - Market Sector**

	Energy Savings (Gross Annual kWh)	Demand Reduction (Gross Summer Peak kW)	Gas Savings (Gross Annual Therms)
<b>Residential</b>	10,608,742	7,969	15,117,855
Single Family	10,596,855	7,962	11,446,723
Multi Family	11,887	7	2,203,305
Mobile Homes	-	-	1,467,826
<b>Nonresidential</b>	(1)	0	38,474,568
Commercial	(1)	0	6,466,306
Industrial	(0)	(0)	30,843,512
Agricultural	-	-	1,164,750
<b>Low Income Energy Efficiency</b>	-	-	6,394,892
<b>Codes &amp; Standards</b>	-	-	5,331,009
<b>Total Energy Efficiency Portfolio</b>	<b>10,608,741</b>	<b>7,969</b>	<b>65,318,324</b>

Program impacts reflect inception-to-date activity.

(1) SoCalGas is in the process of updating energy savings calculations based on recommendations from the Energy Division through the non-DEER workpapers review process. Therefore, some measure level savings values will be changed in the next report.

**2010-2012 ENERGY EFFICIENCY PORTFOLIO –  
PROGRAM PERFORMANCE METRICS TYPE 2A  
REPORT FOR 2011**

**SOUTHERN CALIFORNIA GAS  
COMPANY**

**2010-2012 ENERGY EFFICIENCY  
PORTFOLIO – PROGRAM  
PERFORMANCE METRICS**

**TYPE 2A REPORT FOR 2011**



**2010-2012 ENERGY EFFICIENCY PORTFOLIO  
STATEWIDE PROGRAMS AND SUB-PROGRAMS**

**Narratives for Reporting of  
Program Performance Metrics Type 2a for 2011  
Submitted: May 1, 2012  
Southern California Gas Company (SoCalGas)**

The following narratives for 2010-2012 Energy Efficiency Portfolio Statewide Programs and Subprograms are submitted, pursuant to Commission Decision 09-09-047 and Resolution E-4385. Resolution E-4385 approved Program Performance Metrics (PPMs) and requires annual reporting of metric type 2a for certain Statewide Programs and Subprograms. The narratives below supplement the 2011 Program Performance Metrics Reporting spreadsheet and tables.

**COMMERCIAL**

The Statewide Commercial Energy Efficiency Program offers strategic energy planning support; technical support, such as facility audits and calculation/design assistance; and financial support through rebates and incentives aimed at providing integrated energy management solutions (i.e., energy efficiency, demand response, and distributed generation, including renewables). Targeted segments include distribution warehouses, office buildings, hotels, motels, restaurants, schools, universities, colleges, hospitals, high tech facilities, bio tech facilities, retail facilities, entertainment centers, and smaller customers that have similar buying characteristics.

The five statewide subprograms described below — Calculated Incentives, Deemed Incentives, Continuous Energy Improvement, Direct Install, and Nonresidential Audits — comprise the core product and service offerings for the Commercial Program. Each utility also offers local program elements such as Third Party and Local Government Partnership programs that complement and enhance these core offerings in their region.

<b>PPM ID</b>	<b>Program ID</b>	<b>Program Performance Metric (PPM)</b>	<b>Metric Type</b>
CIA-1	<b>SCG3607 SCG3608 SCG3609 SCG3610</b>	Number and percent (relative to all eligible customers) of commercial, industrial and agricultural customers participating in sub-programs (NRA, Deemed, Calculated, and CEI) by NAICS code, by size (+/- 200 kW per yr or +/- 50K therms per yr), and by Hard to Reach (HTR).	2a

## Progress towards meeting program metric goals

In 2011, SoCalGas continued toward targeted marketing to customer sectors and segments and increased overall customer contact and participation by approximately 69% over 2010.

With the continued support by the Account Executives and Customer Service Technicians and Engineering staff, the non-residential audit program activities increased by approximately 87% over 2010. The assessment recommendations helped to educate customers on energy savings opportunities and influenced them to participate in programs such as Deemed and Calculated.

In addition, SoCalGas made progress in the evolution of market transformation programs that are intended to move customers beyond the traditional approach to short-term energy efficiency projects to long-term strategic energy efficiency planning.

More customers were committing to strategic planning engagements which emphasize the competitive advantages that accompany the pursuit of nationwide energy efficiency certifications and standards. SoCalGas also participated in numerous outreach events and seminars which helped increase the Hard-To-Reach customer base by approximately 53% over 2010.

**CIA-1: See Table CIA-1\_SCG**

### Description of changes in metrics used and reasons for the change

N/A

### Program related or economic changes that impact metric results

N/A

## COMMERCIAL – Continuous Energy Improvement SCG3610

The Commercial Continuous Energy Improvement (CEI) Program is a non resource program which provides a toolkit of planning and other resources, including analysis, benchmarking, goal setting, project implementation support, performance monitoring, and energy management certification.

PPM ID	Program ID	Program Performance Metric (PPM)	Metric Type
CIA-2	SCG3610	Number and percent of commercial, industrial, and agricultural CEI participants that meet short-term (2010-2012) milestones as identified by their long term energy plans.  <u>Note:</u>	2a

		Data to be reported in disaggregate form by SW program (commercial, industrial, and agricultural)	
CIA-4	<b>SCG3610</b>	Number and percent of commercial, industrial, and agricultural customers that created an energy plan via CEI will be tracked by program.  <u>Note:</u> Data to be reported in disaggregate form by SW program (commercial, industrial, and agricultural)	2a

**Progress towards meeting program metric goals**

In 2011, SoCalGas successfully recruited five customers from various commercial market segments, including: a four-star rated hotel, a county government, a grocery chain, a K-12 private boarding school, and a national restaurant chain.

**Description of changes in metrics used and reasons for the change**

N/A

**Program related or economic changes that impact metric results**

N/A

**COMMERCIAL – Deemed Incentives SCG3608**

The Commercial Deemed Incentives Program offers rebates to customers in an easy to use mechanism to offset the cost of off-the-shelf energy saving equipment.

PPM ID	Program ID	Program Performance Metric (PPM)	Metric Type
CIA-7	<b>SCG3608</b>	Number and percent of new, improved, or ETP measures** installed in the commercial, industrial and agricultural programs.  <u>Note:</u> ** “ETP measure” defined as ET measures first introduced into the EE portfolio since January 1, 2006	2a

*Note: Measures considered “new and improved” are measures installed and paid in 2011 that did not have any installation paid in 2006-2009. In addition, filtering was applied to eliminate measures that had not substantially changed. Changes not considered as substantial included changes in rebates and eligibility.*

**Progress towards meeting program metric goals**

The IOUs had several conversations in 2011 to develop a process to identify “new, improved, or ETP” deemed measures in a comparative manner. Agreement was reached to manually review all deemed measures paid in 2011 and identify those measures that were (1) agreed to by all IOUs as a new or substantially improved

measure and (2) introduced during the 2010-2012 program cycle. *The SoCalGas is reporting on the total number of units installed for each of these measures paid in 2011.*

SoCalGas program management staff has been working actively with emerging technology staff and segment advisor staff to recommend, scope, and evaluate new and emerging technologies that have the potential to be promoted with customers. In 2011, a dedicated position was created to review and help with implementing new measures. Commercial Deemed Program added the finned-bottom stock pot measure in 2011.

**Description of changes in metrics used and reasons for the change**

N/A

**Program related or economic changes that impact metric results**

Evaluating new and emerging technology measures to confirm that they provide cost-effective energy efficiency in general is a lengthy process. For the same reason, it takes even longer to ensure enough data has been collected to transfer an emerging technology to the prescriptive Deemed Program. The added challenge is market acceptance of new and emerging technologies because they may have a high incremental measure cost, are not well-known, and are not widely distributed.

**COMMERCIAL – Calculated Incentives SCG3607**

The Calculated Incentives Program offers incentives for customized new construction, retrofit, and retro-commissioning energy efficiency projects. The program also provides comprehensive technical and design assistance.

PPM ID	Program ID	Program Performance Metric (PPM)	Metric Type
CIA-8	SCG3607	Number and percent of new, improved, or ETP measures** installed in completed calculated projects.  ** “ETP measure” defined as ET measures first introduced into the EE portfolio since January 1, 2006.	2a

**Progress towards meeting program metric goals**

Unlike deemed measures, a manual review of all calculated projects would be required to quantify each installation of a “new, improved, or ETP measure.” Such a review is not only time consuming but would be much more subjective, which continues to make a comparative PPM result among the IOUs very challenging. Therefore, SoCalGas’ CIA-8 PPM results reflect only “new, improved, and ETP measures” that are easily identifiable by the project description provided in the tracking database. The actual project scope in each application was not reviewed. (Note that “improved” measures are not easily identifiable with this methodology.)

SoCalGas program management staff has been working actively with emerging technology staff and segment advisor staff to recommend, scope, and evaluate new and emerging technologies that have potential to be promoted with customers. A process to review measures and has been refined and is currently being utilized to track and implement measure development. Several new and/or emerging technology measures were transferred to the program in 2011 resulting in a few commercial installations.

**Description of changes in metrics used and reasons for the change**

N/A

**Program related or economic changes that impact metric results**

N/A

**COMMERCIAL – Direct Install**

**SoCalGas does not have a Direct Install program.**

<b>PPM ID</b>	<b>Program ID</b>	<b>Program Performance Metric (PPM)</b>	<b>Metric Type</b>
COMM-2.1	<b>NA</b>	Number of Direct Install participants that participate in other resource programs or OBF.	2a
COMM-2.2	<b>NA</b>	Percent of Direct Install participants that participate in other resource programs or OBF.	2a
COMM-3.1	<b>NA</b>	Number of participants that are hard to reach (HTR).	2a
COMM-3.2	<b>NA</b>	Percent of participants that are hard to reach (HTR).	2a

**This PPM is not applicable to SoCalGas.**

**INDUSTRIAL**

The Statewide Industrial Energy Efficiency Program partners with industry stakeholders to promote integrated energy management solutions to end use customers. The program offerings together are designed to not only overcome the traditional market barriers to energy efficiency, but also use efficiency to advance distributed generation (DG) and demand reduction (DR) opportunities. Customers from the industrial sector include printing plants, plastic injection molding facilities, component fabrication, lumber and paper mills, cement and quarries, metals processing, petroleum refineries, chemical industries, assembly plants, and water and wastewater treatment plants.

The four statewide sub-programs—Non-Residential Audits, Calculated, Deemed, and Continuous Energy Improvement—comprise the core product and service offerings for the Industrial market. Each utility also offers local program elements such as Third

Party and Local Government Partnership programs that complement and enhance these core offerings in their region.

PPM ID	Program ID	Program Performance Metric (PPM)	Metric Type
CIA-1	SCG3611 SCG3612 SCG3613 SCG3614	Number and percent (relative to all eligible customers) of commercial, industrial and agricultural customers participating in sub-programs (NRA, Deemed, Calculated, and CEI) by NAICS code, by size (+/- 200 kW per yr or +/- 50K therms per yr), and by Hard to Reach (HTR).  <u>Note:</u> Data to be reported in disaggregate form by SW program (commercial, industrial, and agricultural).	2a
IND-1.1	SCG3611 SCG3612 SCG3613 SCG3614	Number of first-time** participants in energy efficiency programs. (Report disaggregate data by sub-program)  <u>Note:</u> ***First time” means customer has not participated in energy efficiency programs since December 31, 2005.	2a
IND-1.2	SCG3611 SCG3612 SCG3613 SCG3614	Percent of first-time** participants in energy efficiency programs. (Report disaggregate data by sub-program)  <u>Note:</u> ***First time” means customer has not participated in energy efficiency programs since December 31, 2005.	2a

### Progress towards meeting program metric goals

In 2011, SoCalGas continued toward targeted marketing to customer sectors and segments and increased overall customer contact and participation by approximately 64% over 2010.

With the continued support by the Account Executives and Customer Service Technicians and Engineering staff, the non-residential audit program activities increased by approximately 65% over 2010. The assessment recommendations helped to educate customers on energy savings opportunities and influenced them to participate in programs such as Deemed and Calculated.

In addition, SoCalGas has had some success in promoting market transformation programs to industrial customers who are motivated by the competitive edge their companies can gain from the incorporation of long-term strategic energy management planning. Though these customers are not typically “first-time” participants in traditional energy efficiency programs, their involvements in these new market transformation programs are the nexus to not only continued energy efficiency participation, but also

generate deeper and more sustainable practices and savings. SoCalGas also participated in numerous outreach events and seminars which helped increase the hard-to-reach customer base by approximately 60% over 2010.

**CIA-1: See Table CIA-1\_SCG**

**Description of changes in metrics used and reasons for the change**

N/A

**Program related or economic changes that impact metric results**

Since this particular sector has a long lead time to develop and coordinate projects, quite a few of the undertakings, which had taken months or even years to develop, were delayed into 2012, or were cancelled altogether.

In this program cycle, SoCalGas introduced new market transformation programs that require more investment from customers in the way of human resources for implementing long-term strategic planning projects. The recent recession has contributed to targeted customers' inability to dedicate the necessary resources to implement these type programs.

**INDUSTRIAL – Continuous Energy Improvement SCG3614**

The Continuous Energy Improvement (CEI) subprogram is a non-resource program which provides a toolkit of planning and other resources, including analysis, benchmarking, goal setting, project implementation support, performance monitoring, and energy management certification.

PPM ID	Program ID	Program Performance Metric (PPM)	Metric Type
CIA-2	SCG3614	Number and percent of commercial, industrial, and agricultural CEI participants that meet short-term (2010-2012) milestones as identified by their long term energy plans.  <u>Note:</u> Data to be reported in disaggregate form by SW program (commercial, industrial, and agricultural)	2a
CIA-4	SCG3614	Number and percent of commercial, industrial, and agricultural customers that created an energy plan via CEI will be tracked by program.  <u>Note:</u> Data to be reported in disaggregate form by SW program (commercial, industrial, and agricultural)	2a

## Progress towards meeting program metric goals

For 2011, SoCalGas successfully recruited 12 CEI customers from various industrial market segments, including: food processing, industrial laundering, smelting, carpet manufacturing, and the aerospace industry. The recruitment of such a diverse group of customers was by design and has been a success in accomplishing the intent of the program pilot, which is to enhance the program's learning experience and identify the specific barriers in each market segment to provide interesting insights that should help shape future CEI offerings.

## Description of changes in metrics used and reasons for the change

N/A

## Program related or economic changes that impact metric results

N/A

## INDUSTRIAL – Deemed Incentives SCG3612

The Industrial Deemed Incentives Program offers rebates to customers in an easy to use mechanism to offset the cost of off-the-shelf energy saving equipment.

PPM ID	Program ID	Program Performance Metric (PPM)	Metric Type
CIA-7	SCG3612	Number and percent of new, improved, or ETP measures** installed in the commercial, industrial and agricultural programs.  <u>Note:</u> ** "ETP measure" defined as ET measures first introduced into the EE portfolio since January 1, 2006.	2a

*Note: Measures considered "new and improved" are measures installed and paid in 2011 that did not have any installation paid in 2006-2009. In addition, filtering was applied to eliminate measures that had not substantially changed. Changes not considered as substantial included changes in rebates and eligibility.*

## Progress towards meeting program metric goals

The IOUs had several conversations in 2011 to develop a process to identify "new, improved, or ETP" deemed measures in a comparative manner. Agreement was reached to manually review all deemed measures paid in 2011 and identify those measures that were (1) agreed to by all IOUs as a new or substantially improved measure and (2) introduced during the 2010-2012 program cycle. *The SoCalGas is reporting on the total number of units installed for each of these measures paid in 2011.*

SoCalGas program management staff has been working actively with emerging technology staff and segment advisor staff to recommend, scope, and evaluate new and emerging technologies that have the potential to be promoted with customers. In 2011,

a dedicated position was created to review and help with implementing new measures. The Commercial Deemed Program added the finned-bottom stock pot measure in 2011.

**Description of changes in metrics used and reasons for the change**

N/A

**Program related or economic changes that impact metric results**

Evaluating new and emerging technology measures to confirm that they provide cost-effective energy efficiency in general is a lengthy process. For the same reason, it takes even longer to ensure enough data has been collected to transfer an emerging technology to the prescriptive Deemed Program. The added challenge is market acceptance of new and emerging technologies because they may have a high incremental measure cost, are not well-known, and are not widely distributed.

**INDUSTRIAL – Calculated Incentives SCG3611**

The Industrial Calculated Incentives Program offers incentives for customized retrofit and retro-commissioning energy efficiency projects. The program also provides comprehensive technical and design assistance.

<b>PPM ID</b>	<b>Program ID</b>	<b>Program Performance Metric (PPM)</b>	<b>Metric Type</b>
CIA-8	<b>SCG3611</b>	Number and percent of new, improved, or ETP measures installed in completed calculated projects.	2a

**Progress towards meeting program metric goals**

Unlike deemed measures, a manual review of all calculated projects would be required to quantify each installation of a “new, improved, or ETP measure.” Such a review is not only time consuming but would be much more subjective, which continues to make a comparative PPM result among the IOUs very challenging. Therefore, SoCalGas’ CIA-8 PPM results reflect only “new, improved, and ETP measures” that are easily identifiable by the project description provided in the tracking database. The actual project scope in each application was not reviewed. (Note that “improved” measures are not easily identifiable with this methodology.)

SoCalGas program management staff has been working actively with emerging technology staff and segment advisor staff to recommend, scope, and evaluate new and emerging technologies that have potential to be promoted with customers. A process to review measures and has been refined and is currently being utilized to track and implement measure development. Several new and/or emerging technology measures were transferred in 2011 resulting in a few industrial installations.

## Description of changes in metrics used and reasons for the change

N/A

## Program related or economic changes that impact metric results

N/A

## AGRICULTURAL

The Statewide Agricultural Energy Efficiency Program offers strategic energy planning support; technical support, such as facility audits and calculation/design assistance; and financial support through rebates and incentives aimed at providing integrated energy management solutions (i.e., energy efficiency, demand response, and distributed generation, including renewables). Targeted segments from the agricultural sector may include agricultural growers (crops, fruits, vegetable and nuts), greenhouses, post-harvest processors (ginners, nut hullers, and associated refrigerated warehouses), dairies and water and irrigation districts/agencies. Targeted segments from the food processing sector include fruit and vegetable processors (canners, dryers, and freezers), prepared food manufacturers, and wineries and other beverage manufacturers.

The Statewide Agricultural Program includes five statewide subprograms: Calculated Incentives; Deemed Incentives; Continuous Energy Improvement (CEI); Nonresidential Audits: Audits include basic audits, integrated audits, and retro-commissioning audits, which provide an inventory of technical project opportunities and financial analysis information; Pump Efficiency Services.

Each utility also offers local program elements such as Third Party and Local Government Partnership programs that complement and enhance these core offerings in their region.

PPM ID	Program ID	Program Performance Metric (PPM)	Metric Type
CIA-1	SCG3602 SCG3603 SCG3604 SCG3606	Number and percent of agricultural customers participating in sub-programs (NRA, Deemed, Calculated, and CEI) by NAICS code, by size (+/- 200 kW per yr or +/- 50K therms per yr), and by Hard to Reach (HTR).  <u>Note:</u> Data to be reported in disaggregate form by SW program (commercial, industrial, and agricultural)	2a

## Progress towards meeting program metric goals

In 2011, SoCalGas continued toward targeted marketing to customer sectors and segments and increased overall customer contact and participation by 59%.

With the continued support by the Account Executives and Customer Service Technicians and Engineering staff, the non-residential audit program activities increased by 52%. The assessment recommendations helped to educate customers on energy savings opportunities and influenced them to participate in programs such as deemed & calculated.

SoCalGas also participated in numerous outreach events and seminars which helped increase the Hard-To-Reach customer base by 62%. There was also a 16% increase in the number of Ag customers participating in the deemed program.

**Description of changes in metrics used and reasons for the change**

N/A

**Program related or economic changes that impact metric results**

N/A

**AGRICULTURAL – Continuous Energy Improvement SCG3606**

The Agricultural Continuous Energy Improvement (CEI) Program is a non resource program which provides a toolkit of planning and other resources, including analysis, benchmarking, goal setting, project implementation support, performance monitoring, and energy management certification.

PPM ID	Program ID	Program Performance Metric (PPM)	Metric Type
CIA-2	SCG3606	Number and percent of commercial, industrial, and agricultural CEI participants that meet short-term (2010-2012) milestones as identified by their long term energy plans.  <u>Note:</u> Data to be reported in disaggregate form by SW program (commercial, industrial, and agricultural)	2a
CIA-4	SCG3606	Number and percent of commercial, industrial, and agricultural customers that created an energy plan via CEI will be tracked by program.  <u>Note:</u> Data to be reported in disaggregate form by SW program (commercial, industrial, and agricultural)	2a

**Progress towards meeting program metric goals**

Throughout 2011, recruitment of agricultural customers for the CEI program was done through various outreach venues, such as agricultural association meetings, etc.

However, to date SoCalGas has not signed up any agricultural customers for this program.

**Description of changes in metrics used and reasons for the change**

N/A

**Program related or economic changes that impact metric results**

N/A

**AGRICULTURAL – Deemed Incentives SCG3603**

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

PPM ID	Program ID	Program Performance Metric (PPM)	Metric Type
CIA-7	SCG3603	Number and percent of new, improved, or ETP measures** installed in the commercial, industrial and agricultural programs.  <u>Note:</u> ** “ETP measure” defined as ET measures first introduced into the EE portfolio since January 1, 2006.	2a

*Note: Measures considered “new and improved” are measures installed and paid in 2011 that did not have any installation paid in 2006-2009. In addition, filtering was applied to eliminate measures that had not substantially changed. Changes not considered as substantial included changes in rebates and eligibility.*

**Progress towards meeting program metric goals**

The IOUs had several conversations in 2011 to develop a process to identify “new, improved, or ETP” deemed measures in a comparative manner. Agreement was reached to manually review all deemed measures paid in 2011 and identify those measures that were (1) agreed to by all IOUs as a new or substantially improved measure and (2) introduced during the 2010-2012 program cycle. *The SoCalGas is reporting on the total number of units installed for each of these measures paid in 2011.*

SoCalGas program management staff has been working actively with emerging technology staff and segment advisor staff to recommend, scope, and evaluate new and emerging technologies that have the potential to be promoted with customers. In 2011 a dedicated position was created to review and help with implementing new and emerging technology measures. No new, improved, or emerging technology measures were added to the Agricultural Deemed program in 2011.

**Description of changes in metrics used and reasons for the change**

N/A

## Program related or economic changes that impact metric results

Evaluating new and emerging technology measures to confirm that they provide cost-effective energy efficiency in general is a lengthy process. For the same reason, it takes even longer to ensure enough data has been collected to transfer an emerging technology to the prescriptive Deemed Program. The added challenge is market acceptance of new and emerging technologies because they may have a high incremental measure cost, are not well-known, and are not widely distributed.

### AGRICULTURAL – Calculated Incentives SCG3602

The Agricultural Calculated Incentive Program offers incentives for customized retrofit and retro-commissioning energy efficiency projects. The program also provides comprehensive technical and design assistance.

PPM ID	Program ID	Program Performance Metric (PPM)	Metric Type
CIA-8	SCG3602	Number and percent of new, improved, or ETP** measures installed in completed calculated projects.  <u>Note:</u> ** “ETP measure” defined as ET measures first introduced into the EE portfolio since January 1, 2006.	2a

### Progress towards meeting program metric goals

Unlike deemed measures, a manual review of all calculated projects would be required to quantify each installation of a “new, improved, or ETP measure.” Such a review is not only time consuming but would be much more subjective, which continues to make a comparative PPM result among the IOUs very challenging. Therefore, SoCalGas’ CIA-8 PPM results reflect only “new, improved, and ETP measures” that are easily identifiable by the project description provided in the tracking database. The actual project scope in each application was not reviewed. (Note that “improved” measures are not easily identifiable with this methodology.)

SoCalGas program management staff has been working actively with emerging technology staff and segment advisor staff to recommend, scope, and evaluate new and emerging technologies that have potential to be promoted with customers. A process to review measures and has been refined and is currently being utilized to track and implement measure development. Several new and/or emerging technology measures were transferred in 2011 resulting in one agricultural installation.

### Description of changes in metrics used and reasons for the change

N/A

## Program related or economic changes that impact metric results

N/A

### RESIDENTIAL

California has set an ambitious market goal of reaching all 13 million existing homes with comprehensive energy efficiency improvements by 2020. To achieve significant progress toward this goal, programmatic efforts must be more integrated, and coordinated and scaled significantly over the next nine years. To work towards this goal California's investor owned utilities (IOUs) have been and are will continue to work closer with the publicly owned utilities (POUs), water agencies, and other organizations in the state. In the 2010-2012 program cycle, the IOUs continue to offer comprehensive activities to reach California's diverse population, climate zones and socio-economic classes to tap the economic potential available while advancing the initiatives of California's Long Term Energy Efficiency Plan (Strategic Plan).

The 2010-2012 California Statewide Program for Residential Energy Efficiency (SPREE) is designed to offer and promote specific and comprehensive energy solutions within the residential market sector. The Residential portfolio employs various strategies and tactics to overcome market barriers and to deliver programs and services aligned to support the Strategic Plan by encouraging adoption of economically viable energy efficiency technologies, practices, and services.

### RESIDENTIAL – Home Energy Efficiency Rebate SCG3616

The Statewide Home Energy Efficiency Rebate (HEER) Program offers rebates to residential end-use customers to cover some of the incremental costs of purchasing energy efficiency appliances. Some products are rebated through an on-line or mail-in application processes while others provide point-of-sale (POS) immediate rebates. It is a prescriptive program where rebates are offered for a specific list of energy-efficient products, this list of rebated measures may vary by utility. Recently, measures that support savings in natural gas and water use have been added to the electricity-saving measures. The measure list includes items that can be delivered then plugged-in such as Energy Star Qualified® Refrigerators, Energy Star Qualified® Room Air Conditioners, Water Heaters, Whole House Fans and Variable Speed Pool Pumps that may involve contractors support. Finally, the Statewide HEER program is traditionally supported by various marketing initiatives that may be funded by the program or other indirect impact marketing programs such as statewide Marketing Education & Outreach (MEO) program and other local marketing program efforts.

PPM ID	Program ID	Program Performance Metric (PPM)	Metric Type
RES-3	SCG3616	Percentage of program rebates made through the	2a

		point-of-sale mode relative to all rebates	
RES-4	<b>SCG3616</b>	Percentage of participating stores located in hard-to-reach (HTR) zip-codes relative to all program participating stores.	2a

**Progress towards meeting program metric goals**

The SoCalGas HEER program was successful in 2011. The HEER program achieved its success due to the effectiveness and ease of use of the point of sale delivery mechanism. SoCalGas was able to maintain POS retailer activities in the hard to reach retail stores through in store marketing communications and actual store visits through SoCalGas’ third party retailer contractor. Due to the effectiveness and customer satisfaction of the POS mechanism, it is quickly being adopted as a statewide implementation procedure between all SW HEER IOUs. The success of these metrics is attributed to multiple marketing and outreach campaigns which contributed to the SW HEER program meeting or exceeding its respective Program Implementation Plan (PIP) forecasts.

**Description of changes in metrics used and reasons for the change**

N/A

**Program related or economic changes that impact metric results**

At this time, there are no program or economic changes impacting metric performance, especially due in part to the popularity of the POS delivery method which has been widely accepted by multiple retail partners across all IOUs.

**RESIDENTIAL - Multifamily Energy Efficiency Rebate**

The Multifamily Energy Efficiency Rebate (MFEER) Program offers prescribed rebates for energy efficient products to motivate the multifamily property owners and managers to install energy efficient products in both common and dwelling areas of multifamily complexes and common areas of mobile home parks and condominiums. An additional objective is to heighten the energy efficiency awareness of property owners/managers and tenants.

The MFEER must address the ongoing concern with “split incentives,” where the residents are not the owners of the property, so they lack incentive to improve their energy usage. Similarly, the property owners do not live on-site and pay higher utility expenses due to inefficient appliances, thus lack any incentive to upgrade. MFEER was designed to drive this customer segment toward participation by offering property owners a variety of energy efficiency measures and services.

PPM ID	Program ID	Program Performance Metric (PPM)	Metric Type
RES-5	<b>SCG3119</b>	Percentage of non-lighting measure savings as	2a

		compared to the total EE measures adopted in the MFEER program. (KWh for single-commodity IOU and BTU for mixed-commodity IOU.)	
--	--	---	--

**This PPM is not applicable to SoCalGas.**

### **RESIDENTIAL – Business Consumer Electronics**

**SoCalGas does not have a Business Consumer Electronics Program.**

<b>PPM ID</b>	<b>Program ID</b>	<b>Program Performance Metric (PPM)</b>	<b>Metric Type</b>
RES-6	NA	Number of participating retailers and number of retail store locations by retailer, and other resellers receiving training.	2a
RES-7	NA	Number of participating retailers receiving detailing.	2a

**This PPM is not applicable to SoCalGas.**

### **RESIDENTIAL – Advanced Lighting**

**SoCalGas does not have an Advanced Lighting Program.**

<b>PPM ID</b>	<b>Program ID</b>	<b>Program Performance Metric (PPM)</b>	<b>Metric Type</b>
RES-9	NA	Percent kW/kWh/Quantity of incented products under the Advanced Lighting program as compared to the Basic Lighting program, by product type.	2a
RES-10	NA	Percent of products incented under the Advanced Lighting Program by distribution channel* and by hard-to-reach (HTR) zip-codes.	2a

**This PPM is not applicable to SoCalGas.**

### **RESIDENTIAL – Basic CFL**

**SoCalGas does not have a Basic CFL Program.**

<b>PPM ID</b>	<b>Program ID</b>	<b>Program Performance Metric (PPM)</b>	<b>Metric Type</b>
RES-12	NA	Percent of products incented under the Basic Lighting Program by distribution channel* and by hard-to-reach (HTR) zip-codes.	2a

This PPM is not applicable to SoCalGas.

## RESIDENTIAL – Appliance Recycling

SoCalGas does not have an Appliance Recycling Program.

PPM ID	Program ID	Program Performance Metric (PPM)	Metric Type
RES-15	NA	Number of program appliance units by year, appliance type, model # (as available), age (estimated), and size.	2a

This PPM is not applicable to SoCalGas.

## RESIDENTIAL – Whole House Retrofit SCG3600, SCG3618

The Prescriptive Whole House Retrofit sub-program (PWHRP) is a new addition to the 2010-2012 residential energy efficiency portfolio of the four California investor owned utilities (IOUs) – Pacific Gas & Electric Company (PG&E), Southern California Edison (SCE), San Diego Gas & Electric Company (SDG&E) and Southern California Gas Company (SoCalGas). In 2010, this program was launched in conjunction with the Whole House Performance Program to the contractors. The whole house approach will be promoted through the statewide PWHRP in close coordination with the IOUs' local Whole House Retrofit Program and the American Recovery and Reinvestment Act's (ARRA) funded Energy Upgrade California (EUC) Program.

PPM ID	Program ID	Program Performance Metric (PPM)	Metric Type
RES-16	SCG3600 SCG3618	Number of homes treated in the program for 2010-2012. (Report by prescriptive and performance program)	2a
RES-17	SCG3600 SCG3618	Number of enrolled contracting firms participating in the program	2a
RES-18	SCG3600 SCG3618	Average Ex-ante savings per home as reported (average kWh, therms, kW) for both performance and prescriptive programs by climate zone	2a
RES-20.1	SCG3600 SCG3618	Number of homes not passing Quality Assurance/Quality Control review, by IOU	2a
RES-20.2	SCG3600 SCG3618	Percentage of homes not passing Quality Assurance/Quality Control review, by IOU	2a

*Note: RES-20 addresses number of homes not passing field Quality Assurance/Quality Control review.*

### Progress towards meeting program metric goals

The SoCalGas Statewide and Local Whole House Prescriptive and Performance rebate program, also known as Energy Upgrade California (EUC), was “soft” launched to contractors in the fourth quarter of 2010. In January 2011, a “hard” launch of the

program to customers, along with ARRA funded marketing, has helped push the program participation. In July of 2011, SoCalGas launched a “gas-only” program in areas not served by SCE (i.e., municipalities in SoCalGas territory) which resulted in covering all eligible customers in all of SoCalGas service territory.

The EUC program was marketed by SoCalGas to customers and industry participants through a variation of approaches from homeowner workshops, contractor participation workshops, contractor marketing collateral and sales trainings, SoCalGas’ website, and other training activities. SoCalGas leveraged marketing activities implemented by ARRA recipients, including the EUC web portal and mass media campaigns.

**Description of changes in metrics used and reasons for the change**

NA

**Program related or economic changes that impact metric results**

In 2011, the participation has picked up in the program with the help of additional American Recovery and Reinvestment Act (ARRA) rebates and financing.

**LIGHTING MARKET TRANSFORMATION (LMT)**

**SoCalGas does not have a Lighting Market Transformation Program.**

PPM ID	Program ID	Program Performance Metric (PPM)	Metric Type
LMT-1	NA	Develop a lighting technology roadmap (i.e., what’s new and available by when (MM/YY), using available information from all IOU and external parties) by January 2011 to be reported twice in 2011 and annually thereafter. (Y/N)	2a
LMT-4	NA	Number of EE lighting measures added, removed, or updated as a result of LMT activities and influence, and reported in annual LMT June Report	2a

**This PPM is not applicable to SoCalGas.**

**NEW CONSTRUCTION**

The IOUs’ Statewide New Construction Program promotes energy efficiency and use of energy-efficient measures by consumers. Statewide New Construction sub-programs include: Savings By Design (non-residential), California Advanced Homes (residential site-built), and Energy Star Manufactured Homes (residential factory-built). The new construction program focuses on the maximization of energy efficiency as an energy resource.

**NEW CONSTRUCTION – California Advanced Homes Program (CAHP) SCG3626**

California Advanced Homes Program (CAHP) is part of the statewide Residential New Construction program offering. CAHP encourages single and multi-family builders of all production volumes to construct homes that exceed California’s Title 24 energy efficiency standards by a minimum of 15 percent. Through this plan, multi-family and single-family projects are approached identically for program purposes except where explicitly noted.

PPM ID	Program ID	Program Performance Metric (PPM)	Metric Type
NC-1	SCG3626	Number and percentage of committed CAHP participant homes (applied and accepted) with modeled, ex-ante savings exceeding 2008 T24 units (Single family (SF) and multi-family (MF)) by 15%-19%, by 20%-29%, 30%-39%, and 40+%.	2a
NC-2	SCG3626	Percentage of (current year SF CAHP program paid units)/ (SF building permits within service territories from the previous year)	2a
NC-3	SCG3626	Percentage of (current year MF CAHP program paid units)/ (MF building permits within service territories from the previous year)	2a

**Progress towards meeting program metric goals**

CAHP continued to enroll new 2008 code projects at a robust pace in 2011. By June 2011, project commitments exceeded the incentive budget for the program cycle and the program was over-subscribed. Starting from August 1, SoCalGas started referring potential customers over to SCE, aligning with the energy savings sharing agreement between the two utilities. As of year-end 2011, approximately 80% of the outstanding project commitments were in the “below 30%” buckets. Approximately one sixth of the units in the current backlog of enrolled units are in the “30 to 39% below Title 24” bucket.

In 2011, SoCalGas paid incentives on 1770 units, approximately 53% of the 3100 units installed, inspected, and posted on the Registry. Compared to the new building permits issued in SCG’s service territory, this represented 10.3% for Single Family permits and 2.3% for Multi Family permits, reflecting the continued softness in new home building. (Note: SoCalGas shares significant overlapping service territories with SCE).

**Description of changes in metrics used and reasons for the change**

N/A

## Program related or economic changes that impact metric results

New home permits in 2011 had declined by over 75% of their peak levels of 2005 (about 160,000 permits) and construction continued to remain in a depressed state. Therefore, 2011 continued to remain a soft year for residential new construction.

Making changes to original plans or adding new plans to meet specific customer expectations became a more prevalent practice among builders, resulting in significant project modifications after signing up for CAHP. These changes had adverse impact on processing enrolled projects, requiring additional plan reviews and implementation of contract modifications.

CHEERS continued to remain closed to new 2008 code projects, and CalCERTS became the only Registry for utility projects. SCG worked closely with CalCERTS, providing leadership in addressing numerous start-up issues (such as obtaining appropriate documents and incorporating them in the Registry uploading process, raters uploading and sharing projects with the utility, streamlining the CF-6R document upload process, etc.) in coping with the requirements of the CAHP program. During the first six months of the year, the registry function for utility projects was seriously impaired, and SCG devised some ingenious work-around methods to continue managing the process.

Several 2005 code projects that had been permitted in or before 2009 continued to be built out during 2011.

## NEW CONSTRUCTION – Energy Star® Manufactured Homes SCG3626

The ENERGY STAR® Manufactured Homes Program (ESMH) is part of the statewide Residential New Construction (RNC) program offering. ESMH addresses new factory-built housing not covered under the state's Title 24 energy codes.

PPM ID	Program ID	Program Performance Metric (PPM)	Metric Type
NC-5	SCG3626	Number of manufactured housing units sold in IOU service territories (via retailers and/or manufacturers) participating in program	2a
NC-6	SCG3626	Number and percentage of participating projects utilizing: (a) whole house incentive for gas heat; (b) whole house incentive for electric heat	2a

## Progress towards meeting program metric goals

The ENERGY STAR® Manufactured Homes Program was in its start up phase during 2010. During 2011, SoCalGas' efforts included coordinating with other CA IOUs; developing a relationship with the California Manufactured Housing Institute (CMHI), the main industry organization in California and other associations; and developing a

practical program to roll out. Steps to developing the program included coordinating with the other CA IOUs, particularly SDG&E at the early part of the year and SCE during the second half. SoCalGas participated in the roll out of the SDG&E program with the intention of modeling the SoCalGas program in a similar format. Work papers were developed, and submitted substantiating the energy savings from ENERGY STAR Manufactured Homes over HUD home. A term purchasing memo of understanding (MOU) was put in place with SCE.

In mid/late 2011, the program development plan was modified to more fully utilize the expertise and network of the Systems Building Research Alliance (SBRA) to more effectively implement the program. The SoCalGas strategy changed from relying primarily on the projects SCE enrolled, and purchasing their therms, to a more proactive relationship with SBRA coordinating a joint program with SCE. This was done to better ensure success, allow for more participation, and minimize customer confusion in overlapping and non-overlapping service territories. To that end, a contract was developed and signed with SBRA in 2011 to facilitate this revised program approach. A modified agreement between SCE and SBRA to support this joint program approach was also negotiated.

### **Description of changes in metrics used and reasons for the change**

N/A

### **Program related or economic changes that impact metric results**

The manufactured housing industry, like the entire housing industry, in 2011 continued its 2010 condition of being in a deep slump in terms of sales and installations. According to the California Manufactured Homes Institute (CMHI), California shipments of new manufactured homes to retailers dropped from 10,783 in 2005 to 1,380 in 2011. Additionally, eight manufactured homes producers (out of 83 around the US) had gone out of business as of 2010. One more manufacturer was added to that list in 2011. Market demand for manufactured homes continued to slump in 2011, reflecting the overall economic conditions. Besides the strategy to purchase therms from SCE, SoCalGas' 2011 efforts were mainly concentrated on developing new program strategies and creating the work papers for the program.

## **CODES AND STANDARDS**

The Codes and Standards (C&S) Program saves energy on behalf of ratepayers by influencing improvement in energy efficiency regulations, by improving compliance with existing codes and standards, and by working with local governments to develop ordinances that exceed statewide minimum requirements. C&S program activities extend to all buildings and potentially any appliance in California, for both advocacy and compliance improvement.

The C&S program aggressively supports the goals of the Strategic Plan which highlights the role of C&S in meeting Assembly Bill (AB) 32 objectives, including Building Code

and Appliance Standards Advocacy, Compliance Enhancement and Reach Code technical support.

**CODES AND STANDARDS – Compliance Enhancements Training SCG3649**

Compliance Enhancement subprogram includes Extension of Advocacy (EOA), standalone measure-specific activities, and holistic process improvements. EOA elements of advocacy subprograms target improvements in compliance with building or appliance efficiency regulations influenced by IOU advocacy. The Compliance Enhancement subprogram (CEP) targets regulations not influenced by IOUs. Compliance enhancement through EOA and CEP are achieved through education, training, and other activities targeting building departments and other building industry actors responsible for compliance. Improvements in compliance with appliance efficiency regulations are achieved through communications, outreach, and other activities targeting manufacturers, retailers, and other California suppliers. The holistic element supports proactive building departments that seek general improvements to operations and compliance improvement processes. Activities may include development of “tools” and other elements of infrastructure that serve multiple compliance enhancement objectives.

<b>PPM ID</b>	<b>Program ID</b>	<b>Program Performance Metric (PPM)</b>	<b>Metric Type</b>
CS-3	<b>SCG3649</b>	Number of role-based, Title 24, training sessions delivered.	2a

**Progress towards meeting program metric goals**

In 2011, the statewide IOU team delivered 59 role-based training sessions.

**Description of changes in metrics used and reasons for the change**

N/A

**Program related or economic changes that impact metric results**

N/A

**RESIDENTIAL AND COMMERCIAL HVAC**

The Statewide Residential and Commercial HVAC Program delivers a comprehensive set of downstream, midstream, and upstream strategies that builds on existing program, education, and marketing efforts and leverages relationships within the HVAC industry to transform the market towards a sustainable, quality driven market. Market transformation and direct energy savings and demand reductions are achieved through a series of six sub-program that make up the comprehensive program approach.

## HVAC – Upstream

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

PPM ID	Program ID	Program Performance Metric (PPM)	Metric Type
HVAC-1	<b>SCG3653</b>	KW/ton incentivized in the program. (Note: Decrease in metric indicates positive progress), combined with (b) the number of units that are incentivized in the program vs. (c) number of units over 5.4 tons shipped to California as tracked by AHRI shipment data (assuming the availability of AHRI data).	2a

**This PPM is not applicable to SoCalGas.**

## HVAC – Residential Energy Star Quality Installation SCG3651

The Residential Energy Star Quality Inspection Program addresses residential installation practices to ensure that equipment is installed and commissioned per industry standards.

PPM ID	Program ID	Program Performance Metric (PPM)	Metric Type
HVAC-3	<b>SCG3651</b>	Percentage of HVAC contracting companies that are participating in statewide residential QI program as a share of the targeted market.	2a

### Progress towards meeting program metric goals

Plans were in place to evolve the current program to become compliant with the PIP. Feasibility research is on-going to offer a HVAC residential QI through a joint utility strategy.

### Description of changes in metrics used and reasons for the change

N/A

### Program related or economic changes that impact metric results

N/A

## HVAC – Commercial Quality Installation SCG3653

The HVAC Commercial Quality Installation Program addresses commercial installation practices to ensure that equipment is installed and commissioned per industry standards.

PPM ID	Program ID	Program Performance Metric (PPM)	Metric Type
HVAC-5	<b>SCG3653</b>	Percentage of HVAC contracting companies that are participating in statewide commercial QI program as a share of the targeted market.	2a

### Progress towards meeting program metric goals

Research was on-going to determine the cost-effectiveness of implementing a Commercial Quality Installation program. Uncertainties in consumer behavior/performance generate difficulty in creating effective/defensive measures. SoCalGas continues to work with SW IOU to develop rigorous procedure for the program.

### Description of changes in metrics used and reasons for the change

N/A

### Program related or economic changes that impact metric results

N/A

## HVAC – Quality Maintenance Development SCG3654

The HVAC Quality Maintenance Development Program addresses residential and commercial maintenance practices to ensure that equipment is serviced per industry standards and that the maintenance effort supports the long term strategic goal of transforming the trade from commodity-based to quality-based.

PPM ID	Program ID	Program Performance Metric (PPM)	Metric Type
HVAC-7	<b>SCG3654</b>	Measured progress towards specific milestones provided in the project GANTT chart indicating the development/finalization of this IOU program based on Quality Maintenance standards.	2a

### Progress towards meeting program metric goals

SoCalGas continued research efforts to identify viable natural gas measures and to determine the cost-effectiveness of implementing a Residential and Commercial Quality Maintenance program. Feasibility research is currently on-going to design a program through a joint utility strategy. SoCalGas continued its participated in Statewide HVAC team discussion on program design and implementation. Please see HVAC-7 GANTT for further details.

**HVAC-7: See TABLE HVAC-7\_SCG**

### Description of changes in metrics used and reasons for the change

N/A

### Program related or economic changes that impact metric results

N/A

## HVAC – Technology and Systems Diagnostics SCG3655

The Program is a coordination and advocacy program that addresses the technical elements critical to increasing the market introduction of advanced cooling and fault detection and diagnostic technologies.

PPM ID	Program ID	Program Performance Metric (PPM)	Metric Type
HVAC-8	SCG3655	Status of progress towards completion of roadmap (i.e., plan and recommendations) to support the development of a national standard diagnostic protocol (activities, concrete actions taken).	2a

### Progress towards meeting program metric goals

A committee of the Western HVAC Performance Alliance was established to spearhead this effort. This committee met several times and SoCalGas collaborated with the team for continued support. The program has not been fully implemented in 2011. Effort has been made to collaborate with Emerging Technologies Program to identify and evaluate viable and cost effective technology. Please review the HVAC-8 GANTT for further details.

**HVAC-8: See TABLE HAVC-8\_Statewide**

### Description of changes in metrics used and reasons for the change

N/A

## Program related or economic changes that impact metric results

N/A

### HVAC – Workforce Education & Training SCG3656

The HVAC Workforce Education and Training (HVAC WE&T) Program offers education and training opportunities targeted at all levels of the HVAC value chain to close training gaps at all levels of the industry.

PPM ID	Program ID	Program Performance Metric (PPM)	Metric Type
HVAC-9	SCG3656	Status of progress towards completion (activities, concrete actions taken) of detailed WE&T roadmap (plans, goals, timelines and recommendations).	2a

### Progress towards meeting program metric goals

SoCalGas worked with the Institute of Heating and Air Conditioning Industries (IHACI) and North American Technicians Excellence (NATE) to provide NATE certification training for contractors, technicians, and industry players. A series of HVAC related topics were offered. A total of seven were offered through the SoCalGas Education and Training Program to aid the process during 2011. SoCalGas collaborated with statewide team to develop strategy to meet the program goal. Please see HVAC-9 GANTT for further details.

### HVAC-9: See TABLE HAVC-9\_Statewide

### Description of changes in metrics used and reasons for the change

N/A

## Program related or economic changes that impact metric results

N/A

### MARKETING, EDUCATION, AND OUTREACH (ME&O) SCG3623

The purpose of Marketing, Education and Outreach (ME&O) is to increase utility consumer awareness and participation in cost-effective energy-saving activities offered by the utilities, as well as to promote behavior changes that result in energy management efforts that save energy and reduce greenhouse gas (GHG) emissions, in coordination with demand response and renewable self-generation options. To be successful, ME&O must move consumers through a transitional process from awareness and knowledge of energy efficiency to action.

The IOUs and CPUC conducted a Brand Assessment and revised the Flex Your Power (FYP) brand and campaign which was completed in 2009. This assessment was presented to parties at a public workshop on December 3, 2009. These results informed the decision to retire the FYP brand to make way for a new approach that will encourage greater behavior change in California’s ratepayers. The Brand Assessment resulted in the creation of a new statewide “smart energy living<sup>1</sup>” brand, called Engage 360, encompassing energy efficiency, demand response, low income, and the flexibility to possibly include other demand side management options at a later date.

<b>PPM ID</b>	<b>Program ID</b>	<b>Program Performance Metric (PPM)</b>	<b>Metric Type</b>
MEO-1	<b>SCG3623</b>	Awareness and knowledge of key elements of the Engage360 brand among customer groups specifically targeted by grassroots and social networking phase of the program.	2a

**Progress towards meeting program metric goals**

The launch of the Engage 360 brand was strategically designed for implementation in two distinct campaign phases: grassroots and mass media. The program was put on hold in September 2011 before it was completely launched. Commissioner Ferron’s October 13, 2011 Assigned Commissioner’s Ruling suspended the program through the end of 2011, pending further guidance. Therefore, the program did not have an opportunity to impact awareness and knowledge of key elements of the brand in 2011.

**Description of changes in metrics used and reasons for the change**

N/A

**Program related or economic changes that impact metric results**

An Assigned Commissioner Ruling (ACR) regarding the Statewide ME&O Program was issued on October 13, 2011 which officially suspended all ME&O activities until Commission Staff could provide Commissioner Ferron recommendations on how to re-strategize the program. Parties were asked to provide their recommendations about program design, which each utility did. No additional program activities took place between September and December 2011.

---

<sup>1</sup> “Smart Energy Living” is defined as a new norm of smart energy use: a culture that delivers on the fundamental California behavior changes necessary to effect long term reduction in energy consumption with a core of raising consciousness and taking action. This definition was taken from the SW ME&O Marketing and Integrated Communications Plan, March 8, 2010.

## WORKFORCE EDUCATION, AND TRAINING (WE&T)

The Statewide Workforce Education and Training (WE&T) Program represents a portfolio of education, training and workforce development planning and implementation funded by or coordinated with the IOUs. The program's three subprograms are Connections, Centergies, and Strategic Planning. WE&T Connections was the only subprogram to have 2a metrics this reporting cycle and are thus discussed below

### WORKFORCE EDUCATION AND TRAINING – CONNECTIONS SCG3629

The WE&T Connections Subprogram focuses on energy efficiency curriculum and related activities that inspire interest in energy careers, new and emerging technology, as well as skills to advance the energy initiatives and goals within the K-12 educational sector and provide information to increase awareness of introductory-level community-based training efforts.

PPM ID	Program ID	Program Performance Metric (PPM)	Metric Type
WET-5	SCG3629	Percent of K-12 WET Connection program participants that are from Title-1 schools.	2a
WET-6	SCG3629	Complete baseline study to determine the current number of partnerships. (Y/N)	2a* *starting in 2011
WET-7	SCG3629	Number of high school continuing education outreach partnerships in WE&T Connection.	2a* *starting in 2011

#### Program progress towards meeting goals

**WET-5:** Throughout 2011, PEAK staff continues to make progress in program development, building strong relationships, increasing student enrollment and educating youth. Program continued collaborations with educational institutions such as the California Department of Education and County Offices of Education to help leverage program recruitment. Although the 2011 program year was affected by changes in the state budget crisis, PEAK is scheduled to meet the cumulative 2010-2012 goals.

**WET-6:** SoCalGas completed a survey of the current number of partnerships to establish a baseline for 2011 and for 2012 metric reporting.

**WET-7:** Partnerships are defined as an organization, agency, unions, non-profits that provide EE related education and training for post high school young adults. They are also groups that include education and training for minority and low income participants. At the end of 2011, SoCalGas had one partnership.

## **Description of changes in metrics used and reasons for the change**

N/A

## **Program related or economic changes that impact metric results**

The California state budget crisis greatly impacted schools and teachers throughout California. Educational budget cuts resulted in teacher lay-offs and grade-level reassignments affecting program retention. When a teacher is moved to a new grade or is terminated, he/she may no longer be able to teach the program. Increased class sizes also make it difficult to retain teachers who find it challenging to teach hands-on science labs with more students. As a result of these factors, PEAK had to devote significant time and resources to reenlisting PEAK teachers in 2011. They increased marketing efforts to enroll new participants and recruited “new schools.” They also launched school campaigns to reengage and support existing teachers. Through these efforts PEAK is slated to achieve program deliverables for 2012.

PPM ID	Program	Sub-Program	Metric	Annual Progress for Program Year 2011												Comments	
				PGE			SCE			SDGE			SCG				
				C	I	A	C	I	A	C	I	A	C	I	A		
CIA-1	CIA combined	CIA	Number and percent (relative to all eligible customers) of commercial, industrial and agricultural customers participating in sub-programs (NRA, Deemed, Calculated, and CEI) by NAICS code, by size (+/- 200 kW per yr or +/- 50K therms per yr), and by Hard to Reach (HTR) <sup>1</sup>	% customers in HTR participating in subprograms	1.28%	0.81%	0.71%	1.4%	3.0%	0.8%	4.00%	2.92%	1.47%	0.58%	1.80%	3.35%	SEE "TABLE CIA-1_SCG" SEE "TABLE CIA-1_SDGE" SEE "TABLE CIA-1_SCE"
				% customers in NRA	1.02%	0.56%	0.57%	1.2%	2.1%	0.5%	4.07%	2.53%	0.54%	0.22%	1.36%	3.57%	
				% Customers in Deemed	0.44%	0.24%	0.11%	0.2%	0.3%	0.1%	0.60%	0.00%	0.00%	0.33%	1.22%	1.45%	
				% Customers in Calculated	0.74%	0.38%	0.38%	1.1%	2.4%	0.2%	3.56%	2.64%	1.47%	0.21%	0.33%	1.01%	
				% Customers in CEI	0.10%	0.13%	0.21%	0.1%	0.2%	0.5%	0.47%	0.27%	0.00%	0.04%	0.25%	0.88%	
				Total CEI Participants	2	5	7	5	12	0	3	2	0	5	12	0	
CIA-2	CIA combined	CEI	Number and percent of commercial, industrial, and agricultural CEI participants that meet short-term (2010-2012) milestones as identified by their long term energy plans.	# Milestones Met	2	4	0	0	2	0	0	0	0	2	0	Data represents inception to December 2011	
				Percent	100.0%	80.0%	0.0%	0.0%	16.7%	0.0%	0.0%	0.0%	0.0%	16.7%	0.0%		
				Total CEI Participants	2	5	7	5	12	0	3	2	0	5	12		0
CIA-4	CIA combined	CEI	Number and percent of commercial, industrial and agricultural customers that created an energy plan via CEI will be tracked by program.	# Creating Energy Plans	2	5	0	0	2	0	0	0	0	2	0	Data represents inception to December 2011	
				Percent	100.0%	100.0%	0.0%	0.0%	16.7%	0.0%	0.0%	0.0%	0.0%	16.7%	0.0%		
				Total CEI Participants	2	5	7	5	12	0	3	2	0	5	12		0
CIA-7	CIA combined	Deemed Incentives	Number and percent of new, improved, or ETP measures <sup>2</sup> installed in the commercial, industrial and agricultural programs	Total Deemed Measure Occurrences	9,914	617	786	13,301	3851	150	3,201	168	21	1030	1225	23	
				# New, Improved, ETP Occurrences	734	114	66	1278	1	2	1187	34	3	90	2	0	
				Percent	7.4%	18.5%	8.4%	9.6%	0.0%	1.3%	37.1%	20.2%	14.3%	8.7%	0.2%	0.0%	
CIA-8	CIA combined	Calculated Incentives	Number and percent of new, improved, or ETP measures installed in completed calculated projects.	Total Calculated Measure Occurrences	1,055	171	804	735	163	192	489	24	0	93	88	16	
				# New, Improved, ETP Occurrences	20	12	72	2	3	0	3	0	2	6	1		
				Percent	1.9%	7.0%	9.0%	0.3%	1.8%	0.0%	0.6%	0.0%	0.0%	2.2%	6.8%	6.3%	
Comm-2.1	Commercial	Direct Install	Number of Direct Install participants that participate in other resource programs or OBF.	Total Participants	4117			38,232			1620			NA		NA	
				# Participating in Other EE programs	665			260			48			NA			NA
Comm-2.2	Commercial	Direct Install	Percent of Direct Install participants that participate in other resource programs or OBF.	16.15%			0.68%			2.96%			NA		NA		
				1188			13,630			436			NA		NA		
Comm-3.1	Commercial	Direct Install	Number of participants that are hard to reach (HTR). <sup>1</sup>	28.86%			35.65%			26.91%			NA		NA		
				959			272			331			331		331		
Ind-1.1	Industrial	Ind	Number of first time <sup>6</sup> participants in energy efficiency programs. (Report disaggregate data by sub-program)	Total First Time Participants	539			959			272			331		331	
				Calculated	68			19			13			31			
Ind-1.2	Industrial	Ind	Percent of first time <sup>6</sup> participants in energy efficiency programs. (Report disaggregate data by sub-program)	Deemed	297			810			235			56		69.7%	
				Non Res Audits	174			127			24			244			
			CEI	0			3			0			0		0		
			% First Time Participants	90.1%			68.7%			52.6%			69.7%		69.7%		
			Calculated	70.1%			16.4%			28.9%			46.3%		46.3%		
			Deemed	92.5%			53.8%			53.8%			63.6%		63.6%		
			Non Res Audits	97.2%			83.6%			66.6%			76.3%		76.3%		
			CEI	0.0%			27.3%			0.0%			0.0%		0.0%		

PPM ID	Program	Sub-Program	Metric	Annual Progress for Program Year 2011						Comments	
				PGE	SCE	SDGE	SCG				
RES-3	Residential	Home EE Rebate	Percentage of program rebates made through the point-of-sale mode relative to all rebates	3.7%	46.5%	15.0%	49.7%	PG&E's program offered 1 measure (dishwashers); other IOUs offer more than 1 measure (refrigerators). PG&E is collecting customer information on every rebate; other IOUs are collecting a sample.			
RES-4	Residential	Home EE Rebate	Percentage of participating stores located in hard-to-reach (HTR) zip-codes relative to all program participating stores <sup>15</sup>	46.8%	41.2%	29.0%	17.0%	Metric reported in terms; SCE reflects savings for electric-only utility			
RES-5	Residential	MF EE Rebate	Percentage of non-lighting measure savings as compared to the total EE measures adopted in the MFEER program. (KWh for single-commodity IOU and BTU for mixed-commodity IOU)	65.6%	1.1%	56.5%	NA				
RES-6	Residential	BCE	Number of participating retailers, and number of retail store locations by retailer, and other resellers receiving training.	SEE TABLE "RES-6_BCE_Statewide" FOR LIST OF RETAILER NAMES AND NUMBER OF STORES BY RETAILER				NA	NA		
			# of Participating Retailers/Resellers	14	5	4	NA				
			# of Store Locations	351	171	43	NA				
RES-7	Residential	BCE	Number of participating retailers receiving detailing.	351	171	43	NA				
RES-9	Residential	Advanced Lighting	Percent kWh/Wh/Quantity of incandescent products under the Advanced Lighting program as compared to the Basic Lighting program, by product type.	ALSO SEE "TABLE RES-9_Statewide"							
			Advanced	29.5%	26.3%	26.3%	40.0%	41.1%	58.8%	16.9%	
			Reflector	58.0%	60.6%	60.6%	18.9%	21.8%	3.6%	20.7%	
			Dimmable	11.0%	14.1%	14.1%	0.6%	0.4%	2.4%	14.5%	
			Three-Way	0.0%	0.0%	0.0%	1.9%	2.0%	0.1%	0.5%	
			Covered	28.7%	23.9%	23.9%	16.2%	14.9%	8.1%	35.3%	
			Base Spiral >30 Watts	1.0%	2.4%	2.4%	2.2%	1.5%	0.6%	5.9%	
			EX-Fixture	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	5.6%	
			Inf-Fixture	0.5%	1.3%	1.3%	0.1%	0.3%	0.3%	1.3%	
			LED - Seasonal	0.0%	0.0%	0.0%	0.0%	0.0%	83.6%	0.4%	
			Plug-in CFL Lamp	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	5.1%	
			LED - Desk Lamp	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
			Plug-in LED night light*	PG&E is not pursuing these products						0.0%	0.0%
			Basic (CFL base spiral <30 W)	70.5%	73.7%	73.7%	60.0%	59.1%	58.9%	80.4%	
			Distribution Channel	% HTR						% HTR	
			Discount	9.50%	30.91%	30.91%	23.7%	54.2%	5.1%	1.0%	
			Drug	0.00%	0.00%	0.00%	0.4%	15.8%	0.0%	0.0%	
			Grocery	30.40%	45.07%	45.07%	42.3%	54.1%	59.2%	15.2%	
			Hardware	15.90%	54.65%	54.65%	7.0%	38.7%	0.0%	0.0%	
			Home Improvement	6.00%	19.82%	19.82%	3.3%	43.4%	33.3%	13.1%	
			Ltg & Electronics	0.00%	0.00%	0.00%	0.4%	20.3%	0.0%	0.0%	
			Mass Merchandise	9.00%	22.87%	22.87%	3.6%	40.8%	0.0%	0.0%	
			Membership Club	18.90%	24.13%	24.13%	19.0%	45.3%	2.3%	0.0%	
			Large Supermarket	1.30%	32.92%	32.92%	n/a	n/a	0.0%	0.0%	
			Other	9.00%	27.73%	27.73%	0.3%	48.4%	0.0%	0.0%	
			Total Hard to Reach	36.1%						50.2%	29.4%
RES-10	Residential	Advanced Lighting	Percent of products incandescent under the Advanced Lighting Program by distribution channel <sup>16</sup> and by hard-to-reach (HTR) zip-codes.	NA						NA	

PPM ID	Program	Sub-Program	Metric	Annual Progress for Program Year 2011										Comments
				PGE		SCE		SDGE		SCG				
				%	% HTR	%	% HTR	%	% HTR		%	% HTR		
RES-12	Residential	Basic CFL	Percent of products incented under the Basic Lighting Program by distribution channel <sup>a</sup> and by hard-to-reach (HTR) ZIP-codes.											
				19.48%	32.14%	27.5%	51.5%	26.5%	3.6%	0.0%	0.0%	NA		
				0.01%	100%	0.2%	31.0%	0.2%	0.0%	0.0%	0.0%			
				40.68%	47.81%	40.5%	55.1%	26.4%	7.8%					
				2.52%	47.23%	3.6%	28.1%	0.4%	0.3%					
				7.28%	21.38%	6.2%	49.3%	1.9%	1.1%					
				n/a	n/a	0.4%	39.1%	0.9%	0.0%					
				8.59%	26.04%	6.7%	39.3%	3.6%	0.0%					
				9.38%	26.26%	14.6%	49.3%	40.2%	0.0%					
				0.92%	41.06%	n/a	n/a	0.0%	0.0%					
				11.14%	30.30%	0.4%	56.9%	0.0%	0.0%					
			Total Hard to Reach	36.9%		50.8%		12.1%						
RES-15	Residential	Appliance Recycling	Number of program appliance units by year, appliance type, model # (as available), age (estimated), and size.	SEE "TABLE RES-15_PGE"		SEE "TABLE RES-15_SCE"		SEE "TABLE RES-15_SDGE"		NA				
RES-16.1	Residential	Whole House Retrofit	Number of homes treated in the program for 2010-2012. (Report by prescriptive program.)	39		11		17		11			SCG has a SCE/SCG joint Whole House program. SCG launched an "SCG gas-only" program in 2011, however, there were no "gas-only" projects completed in 2011.	
RES-16.2	Residential	Whole House Retrofit	Number of homes treated in the program for 2010-2012. (Report by performance program.)	959		66		131		66				
RES-17	Residential	Whole House Retrofit	Number of enrolled contracting firms participating in the program	169		125		58		125			SCE and SCG utilize joint contractors	
RES-18.1	Residential	Whole House Retrofit	Average Ex-ante savings per home as reported (average kWh, therms, kW) for performance program by climate zone											
			Climate Zone	Avoid kW	Therm saving kWh	Avoid kW	Therm saving kWh	Avoid kW	Therm saving kWh	Avoid kW	Therm saving kWh			
			2	1.1	604	484								
			3	0.4	547	365								
			4	0.7	889	317								
			5	0.2	208	359								
			6				0.63	441	n/a			n/a	140	
			7							0.83	920	174		
			8				2.01	1373	n/a			n/a	116	
			9				3.59	3162	n/a			n/a	182	
			10				2.03	2608	n/a	3.73	4531	191		
			11	3.9	4374	241						n/a	141	
			12	1.5	1382	288								
			13	3.7	5573	217								
			14				2.88	680	n/a			n/a	297	
			16	5.1	7010	0								
RES-18.2	Residential	Whole House Retrofit	Average Ex-ante savings per home as reported (average kWh, therms, kW) for prescriptive program by climate zone											
RES-20.1	Residential	Whole House Retrofit	Number of homes not passing Quality Assurance/Qualif Control review, by IOU	90		2		5		2		2		
RES-20.2	Residential	Whole House Retrofit	Percentage of homes not passing Quality Assurance/Quality Control review, by IOU	21.0%		3.0%		8.0%		3.0%		3.0%	SCE and SCG data are for joint projects	
LMT-1	Lighting Market Transform.	LMT	Develop a lighting technology roadmap (i.e., what's new and available by when (MM/YY), using available information from all IOU and external parties) by January 2011 and to be reported twice in 2011 and annually thereafter. (Y/N)									NA		
LMT-4	Lighting Market Transform.	LMT	Number of EE lighting measures added, removed, or updated as a result of LMT activities and influence, or reported in annual LMT June Report									NA		

PPM ID	Program	Sub-Program	Metric	Annual Progress for Program Year 2011												Comments		
				PGE			SCE			SDGE			SCG					
NC-1	New Construction	CAHP	Number and percentage of committed CAHP participant homes (duplicated or added) with modeled, excessive savings exceeding 2008 Title 24 permits (Single-Family (SF) multi-family (MF) by 15%-19%, by 20%-29%, 30%-39%, and 40%+).	T24 Participants	#	%	#	%	#	%	#	%	#	%	Total	%	#	%
				SF 15%-19%	376	4.8%	858	61.4%	722	47.4%	2797	50.2%						
				SF 20%-29%	5717	73.5%	278	19.9%	652	42.8%	1699	30.5%						
				SF 30%-39%	1300	16.7%	190	13.6%	118	7.7%	1012	18.1%						
				SF 40%+	390	5.0%	72	1398	5.2%	32	1524	2.1%	69	1.2%				
				MF 15%-19%	2251	39.0%	6	1.4%	450	28.2%	405	62.1%						
				MF 20%-29%	1792	31.1%	6	1.4%	1063	66.6%	153	23.5%						
				MF 30%-39%	958	16.6%	401	94.1%	83	5.2%	92	14.1%						
				MF 40%+	766	13.3%	13	3.1%	0	1596	0.0%	2	0.3%					
				2011 paid permits	5767	2010 permits	426	2011 paid permits	1596	2010 permits	0	2011 paid permits	652	2010 permits	0			
Percentage of (current year SF CAHP program paid units) (SF building permits within service territories from the previous year)	1,561	13,498	11.6%	1,245	14,538	9%	664	2,267	29.3%	1516	14,538	10.4%	PG&E's MF results are from PG&E's Third Party CMFNH program, not CAHP					
NC-2	New Construction	CAHP	Percentage of (current year SF CAHP program paid units) (SF building permits within service territories from the previous year)	2,112	10,078	21.0%	1,974	9,991	20%	74	1,083	6.8%	254	9,911	2.6%			
NC-3	New Construction	CAHP	Percentage of (current year MF CAHP program paid units) (MF building permits within service territories from the previous year)															
NC-5	New Construction	ES Mfg. Homes	Number of manufactured housing units sold in IOU service territories (via retailers and/or manufacturers) participating in program	204														
NC-6	New Construction	ES Mfg. Homes	Number and percentage of participating projects utilizing: (a) whole house incentive for gas heat; (b) whole house incentive for electric heat	#	Gas %	Elec %	#	Gas %	Elec %	#	Gas %	Elec %	#	Gas %	Elec %			
				204	98%	2%	0	0%	0%	0	0%	0%	0	0%	0%			
CS-3	Codes & Standards	Compliance Enhance	Number of role-based, Title 24, training sessions delivered.															
																	59	
HVAC-1.1	HVAC	Upstream HVAC	(a) kW/ton incentivized in the program. (Note: Decrease in metric indicates positive progress).	0.090 kW/ton			0.157 kW/ton			0.336 kW/ton				NA				
HVAC-1.2	HVAC	Upstream HVAC	(b) the number of units that are incentivized in the program vs.	45,069 tons			66,882 tons			1760.5 tons				NA				
HVAC-1.3	HVAC	Upstream HVAC	(c) number of units over 5.4 tons shipped to California as tracked through AHRI shipment data. (Assuming the availability of AHRI data.)											NA				
HVAC-3	HVAC	Res ES Quality Installation	Percentage of HVAC contracting companies that are participating in statewide residential OI program as a share of the targeted market	2.95%			0.4%			0.0%				Program not launched in 2011				
HVAC-5	HVAC	Com Quality Installation	Percentage of HVAC contracting companies that are participating in statewide commercial OI program as a share of the targeted market	0.16%			0.04%			0%				Program not launched in 2011				
HVAC-7	HVAC	Quality Maintenance Dev	Measured progress towards specific milestones in the project Gantt chart indicating the development/initialization of this IOU program based on Quality Maintenance standards.	SEE "TABLE HVAC-7_PGE"			SEE "TABLE HVAC-7_SCE"			SEE "TABLE HVAC-7_SDGE"			SEE "TABLE HVAC-7_SCG"				Program launched in 2011. See separate TABLE HVAC-7 for each IOU for updated QM Development Plan timeline of milestones	
HVAC-8	HVAC	Tech and System Diagnostics	Status of progress towards completion of roadmap (i.e., plan and recommendations) to support the development of a national standard diagnostic protocol (activities, concrete actions taken).				SEE "TABLE HVAC-8"			for statewide update								
HVAC-9	HVAC	WE&T	Status of progress towards completion (activities, concrete actions taken) of detailed WE&T roadmap (plans, goals, timelines and recommendations).				SEE "TABLE HVAC-9"			for statewide update								

PPM ID	Program	Sub-Program	Metric	Annual Progress for Program Year 2011						Comments					
				PGE	SCE	SDGE	SCG								
MEO-1	MEO	MEO	Awareness and knowledge of key elements of the Engage360 brand among customer groups specifically targeted by grassroots and social networking phase of the program.								The launch of the Engage 360 brand was strategically designed for implementation in two distinct campaign phases: grassroots and mass media. The program was not held in September 2011, before it was completely launched. Therefore, it did not have an opportunity to impact awareness and knowledge of key elements of the brand.				
WET-5	WE&T	Connections	Percent of K-12 WET Connection program participants that are from Title-1 schools												
				<b>Participating Schools</b>	<b>Total</b>	<b>Title 1</b>	<b>%</b>	<b>Total</b>	<b>Title 1</b>	<b>%</b>	<b>Total</b>	<b>Title 1</b>	<b>%</b>		
				643	405	63.0%	919	478	52.0%	77	41	53.2%	198	128	64.6%
				Y - Completed in 2010											
WET-6	WE&T	Connections	Complete baseline study to determine the current number of partnerships. (Y/N)												
WET-7	WE&T	Connections	Number of high school continuing education outreach partnerships in WET Connection		16			3		2				1	

2011 Joint IOU Program Performance Metrics Report - May 1, 2012

Footnote #	Footnote
1	"HTR" is as defined in the EE Policy Manual
2	<p>Data sources for reporting will come from (a) program tracking databases and (b) process evaluation to refine estimates.</p> <p>– An audit completed in one portfolio may have measures implemented over several years and portfolios.</p>
3	"ETP measure" defined as ET measures first introduced into the EE portfolio since January 1, 2006
4	"ETP measure" defined as ET measures first introduced into the EE portfolio since January 1, 2006
5	"Integration Bonus" is an incentive mechanism to promote greater integration of DSM resources, available to customers who (a) sign up or are already signed up for a DSM program, and (b) purchase, install, and/are eligible to receive a rebate for an energy saving device.
6	"First time" means customer has not participated in energy efficiency programs since December 31, 2005.
7	As is indicated within this PPM, the availability of item (c) in this PPM is not yet confirmed, since it is closely-held, proprietary third-party information. The IOU team is in discussions with AHRI about obtaining this data and to ascertain the statistical validity of what data would be provided; the IOU team will communicate with the ED about any issues regarding this data element before the first reporting period in Q1 2011 for 2010 information.
8	"Target market" defined as C20 licensed HVAC contracting companies in CA.
9	The IOUs use the existing HERS Rater infrastructure to verify HERS measures and other building characteristics as required by CA Title 24 and the CEC. The IOUs do not perform the verification inspections and do not certify HERS raters. Note: HERS inspection protocol for production builders does not require inspection of 100% of homes; there is a sampling protocol. For more information on HERS inspection please see <a href="http://www.energy.ca.gov/HERS/index.html">http://www.energy.ca.gov/HERS/index.html</a>
10	Distribution channels" are as defined in 06-08 Upstream Lighting Study
11	Data sources for reporting will come from (a) program tracking databases and (b) process evaluation to refine estimates.
12	"Adoption" means measure is available to end-use customers through IOU programs. Adoption of a measure may be attributed to one or more ET sub-programs
13	Potential energy impacts to be reported based on ET project findings and estimated market potential (reported through quarterly ET database updates)

2011 Joint IOU Program Performance Metrics Report - May 1, 2012

Footnote #	Footnote
14	"Use Cases" describe the need for a technology or application.
15	"Possible action" means that the manufacturer/private industry considered TDS results in their product development efforts.
16	Educational "collaboration" is defined as seminars, outreach events and consultations as needed. These collaborations include exchanges of monetary or in-kind support and services (i.e., sharing meeting facilities, marketing/promotional services, etc.).
17	"Substantial" is defined as approximately 50% or more of class content must address IDSM subject matter
18	The data for this metric applies to rebates made through the point of sale (POS) mode.

**PPM CIA-1** Number and percent (relative to all eligible customers) of commercial, industrial and agricultural customers participating in sub- programs (for example, NRA, Deemed, Calculated and CEI) by NAICS code, by size (+/- 200 kW per year or +/- 50k Therms per yr), and by Hard to Reach (HTR)

**SOUTHERN CALIFORNIA GAS**

As Shown on Master Tab:

% of Total Eligible	Commercial			Industrial			Agricultural		
	% Participating	% Hard to Reach	% in NRA	% in Deemed	% in Calculated	% in CEI			
	0.58%	0.00%	0.00%	1.38%	1.22%	0.00%			
	0.22%	1.38%	0.00%	1.22%	1.01%	0.00%			
	0.33%	1.22%	0.33%	0.25%	0.88%	0.00%			
	0.21%	0.33%	0.21%	0.04%	0.00%	0.00%			
	0.04%	0.25%	0.04%	0.00%	0.00%	0.00%			
	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%			

Calculation:

Total Eligible by NAICS code indicator	Total Eligible	Number Participating	Percent of Total Eligible	Total Eligible Hard to Reach	Number Participating Hard to Reach	Percent Hard to Reach
Commercial	196,439	1,146	0.58%	71,907	155	0.22%
Industrial	26,283	0	0.00%	7471	103	1.38%
Agricultural	1,584	0	0.00%	729	26	3.57%
<b>TOTAL</b>	<b>224,306</b>	<b>1,146</b>	<b>0.51%</b>	<b>80,107</b>	<b>284</b>	<b>0.35%</b>

Commercial Customers by NAICS Code									
NRA		DEEMED			CALCULATED			CEI	
NAICS3	#	NAICS3	#	NAICS3	#	NAICS3	#	NAICS3	#
423 Merchant Wholesalers	2	Missing	1	Missing	3				
424 Merchant Wholesalers	8	441 Motor Vehicle and Parts	1	445 Food and Beverage Stores	1				
441 Motor Vehicle and Parts	1	445 Food and Beverage Store	23	531 Real Estate	1				
443 Electronics and Appliance	2	447 Gasoline Stations	1	541 Professional Scientific and Technical Services	1				
444 Building Material and Garden Supplies	2	452 General Merchandise Stores	9	611 Educational Services	17				
445 Food and Beverage Stores	15	493 Warehousing and Storage	1	621 Ambulatory Health Care Services	3				

Joint IOU 2011 Program Performance Metrics Report - May 1, 2012

446	Health and Personal Car	3	519	Other Information Servid	1	622	Hospitals	12	
447	Gasoline Stations	3	522	Credit Intermediation an	1	623	Nursing and Residential Car	1	
452	General Merchandise St	2	531	Real Estate	8	712	Museums Historical Sites an	1	
453	Miscellaneous Store Ret	1	541	Professional Scientific an	1	713	Amusement Gambling and P	5	
485	Transit and Ground Pass	1	561	Administrative and Supp	2	721	Accommodation	3	
488	Support Activities for Tra	4	611	Educational Services	38	722	Food Services and Drinking	20	
493	Warehousing and Stora	1	621	Ambulatory Health Care	2	811	Repair and Maintenance	1	
511	Publishing Industries (ex	1	622	Hospitals	13	812	Personal and Laundry Servid	3	
512	Motion Picture and Sour	2	623	Nursing and Residential C	7	922	Justice Public Order and Saf	4	
519	Other Information Servi	3	624	Social Assistance	4				
522	Credit Intermediation ar	1	711	Performing Arts Spectat	2				
523	Securities Commodity C	1	713	Amusement Gambling a	3				
524	Insurance Carriers and R	2	721	Accommodation	33				
531	Real Estate	14	722	Food Services and Drinki	218				
532	Rental and Leasing Servi	1	811	Repair and Maintenance	2				
541	Professional Scientific ar	12	812	Personal and Laundry Se	29				
561	Administrative and Supp	5	813	Religious Grantmaking C	6				
562	Waste Management and	2	922	Justice Public Order and	2				
611	Educational Services	69	923	Administration of Huma	1				
621	Ambulatory Health Care	6	924	Administration of Enviro	1				
622	Hospitals	12	927	Space Research and Tech	1				
623	Nursing and Residential	22	928	National Security and Int	1				
624	Social Assistance	4							
711	Performing Arts Spectat	6							
712	Museums Historical Site	4							
713	Amusement Gambling a	26							
721	Accommodation	55							
722	Food Services and Drink	297							
812	Personal and Laundry Se	47							
813	Religious Grantmaking C	5							
920	PUBLIC ADMINISTRATION	1							
921	Executive Legislative and	4							
922	Justice Public Order and	5							
923	Administration of Huma	2							
924	Administration of Enviro	4							
		658				412		76	
							Total Commercial	1146	

**Commercial Customers by Size**

CUST_SIZE	NRA		DEEMED		CALCULATED		CEI	
	#	%	#	%	#	%	#	%
SMALL	497	0.25%	375	0.19%	46	0.02%	0	0.00%
LARGE	161	0.08%	37	0.02%	30	0.02%	0	0.00%
Total	658	0.33%	412	0.21%	76	0.04%	0	0.00%

Notes: Customer Size: LARGE - >50k therms/yr

Customer Size: SMALL - <50k therms/yr

**Commercial Hard-to-Reach Customers**

Hard-to-Reach Customers	NRA		Deemed		Calculated		CEI	
	#	%	#	%	#	%	#	%
Hard-to-Reach Customers	135	0.07%	138	0.07%	20	0.01%	0	0.00%

**Industrial Customers by NAICS Code**

NAICS	DEEMED		CALCULATED		CEI	
	#	NAICS3	#	NAICS3	#	NAICS3
211 Oil and Gas Extraction	2	213 Support Activities for Mining	1	212 Mining (except Oil and Gas)	1	
212 Mining (except Oil and Gas)	2	311 Food Manufacturing	31	221 Utilities	1	
221 Utilities	5	312 Beverage and Tobacco Products	7	311 Food Manufacturing	16	
236 Construction of Buildings	3	313 Textile Mills	9	312 Beverage and Tobacco Products	1	
311 Food Manufacturing	74	314 Textile Product Mills	1	313 Textile Mills	8	
312 Beverage and Tobacco Products	10	315 Apparel Manufacturing	2	314 Textile Product Mills	1	
313 Textile Mills	33	321 Wood Product Manufacturing	1	322 Paper Manufacturing	3	
314 Textile Product Mills	2	322 Paper Manufacturing	5	323 Printing and Related Support Activities	1	
321 Wood Product Manufacturing	1	324 Petroleum and Coal Products	8	324 Petroleum and Coal Products	8	
322 Paper Manufacturing	15	325 Chemical Manufacturing	13	325 Chemical Manufacturing	5	
323 Printing and Related Support Activities	2	327 Nonmetallic Mineral Product Manufacturing	1	326 Plastics and Rubber Products	3	
324 Petroleum and Coal Products	5	332 Fabricated Metal Product Manufacturing	3	327 Nonmetallic Mineral Product Manufacturing	2	
325 Chemical Manufacturing	31	333 Machinery Manufacturing	1	331 Primary Metal Manufacturing	4	
326 Plastics and Rubber Products	20	334 Computer and Electronic Products	1	332 Fabricated Metal Product Manufacturing	5	
327 Nonmetallic Mineral Product Manufacturing	4	336 Transportation Equipment Manufacturing	3	333 Machinery Manufacturing	1	
331 Primary Metal Manufacturing	27			334 Computer and Electronic Products	3	
332 Fabricated Metal Product Manufacturing	42			336 Transportation Equipment Manufacturing	1	
333 Machinery Manufacturing	7			339 Miscellaneous Manufacturing	3	





PPM ID HVAC-7 Measured progress towards specific milestones provided in the project GANTT chart indicating the development/finalization of this IOU program based on Quality Maintenance standards.

**SCG Table - HVAC Quality Maintenance Program Development Plan**

Task Name	Timeframe											
	2010				2011				2012			
	Q1-2010	Q2-2010	Q3-2010	Q4-2010	Q1-2011	Q2-2011	Q3-2011	Q4-2011	Q1-2012	Q2-2012	Q3-2012	Q4-2012
Statewide HVAC QM Project Planning	Actual - Completed											
Statewide HVAC QM Project Research												
Statewide HVAC QM Program Design Development												
Statewide HVAC QM Testing & Feasibility Activity (Field Study)												
Statewide HVAC QM Project Design Evaluation												
Statewide HVAC QM Phase II Planning												

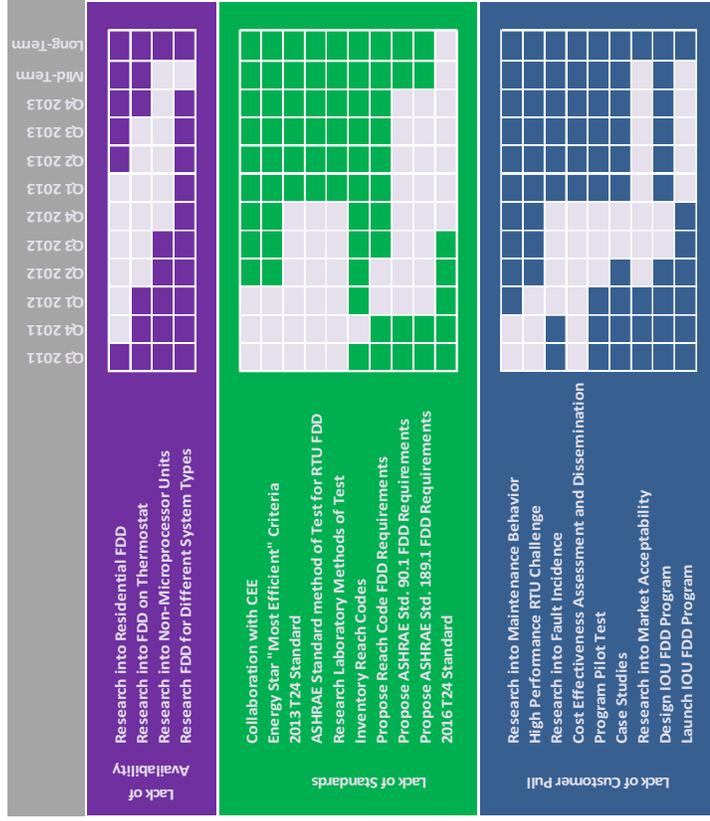
KEY	
Plan	Actual

**PPM ID HVAC-8** Status of progress towards completion of roadmap (i.e., plan and recommendations) to support the development of a national standard diagnostic protocol (activities, concrete actions taken).

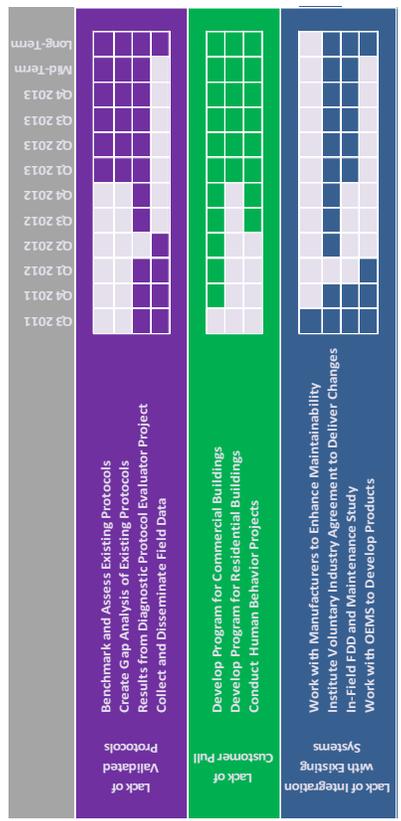
**Statewide Table - HVAC Technology & Systems Diagnostics Plan to Support Development of National Standard Diagnostic Protocol**

The Automated Fault Detection Subcommittee of Western HVAC Performance Alliance's Technology Committee, was established in 2010 to spearhead this effort. This committee has met several times on a regular schedule and brainstormed items that needed to be on the roadmap. A draft "Onboard and In-Field Fault Detection and Diagnostics—Industry Roadmap" has been developed by this committee. The draft roadmap includes strategies and timelines to address gaps, barriers, lack of standards and protocols. Several items that were identified in the roadmap are currently underway, including efforts with industry, researchers, utilities and regulatory bodies. An effort with ASHRAE was successful and resulted in ASHRAE establishing a standards project committee for "Laboratory Method of Test of Fault Detection and Diagnostics Applied to Commercial Air-Cooled Packaged Systems".

From "Onboard and In-Field Fault Detection and Diagnostics—Industry Roadmap".  
Table 2: Action Items Required to Meet Strategy 4-5 of the CLTEESP—Develop nationwide standards and/or guidelines for onboard diagnostic functionality and specification for designated sensor mount locations.



From "Onboard and In-Field Fault Detection and Diagnostics—Industry Roadmap".  
Table 3: Action Items Required to Meet Strategy 4-6 of the CLTEESP—Prioritize in-field diagnostic and maintenance approaches based on the anticipated size of savings, cost of repairs and the frequency of faults occurring.



PPM ID HVAC-9

Status of progress towards completion (activities, concrete actions taken) of detailed WE&T roadmap (plans, goals, timelines and recommendations).

KEY	
Plan	Actual

**Statewide Table  
HVAC Workforce Education & Training (WE&T) Plan**

Task Name	Timeframe												
	2010				2011				2012				
	Q1-2010	Q2-2010	Q3-2010	Q4-2010	Q1-2011	Q2-2011	Q3-2011	Q4-2011	Q1-2012	Q2-2012	Q3-2012	Q4-2012	
Overall WE&T needs assessment													
Actual - Completed													
Gap analysis of WE&T needs assessment													
Actual - Completed													
HVAC WE&T needs assessment plan													
Actual - Completed													
HVAC WE&T needs assessment													
Actual - In Progress													
Review HVAC WE&T assessment & develop training program to address gaps													
Actual - In Progress													
WE&T Needs Assessment and WE&T PIP: Advance Strategic Plan goals by implementing a contractor accreditation program.													
Actual - In Progress													
WE&T Needs Assessment and WE&T PIP: Advance Strategic Plan goals by providing expanded QI/QM training.													
Actual - In Progress													
WE&T Needs Assessment and WE&T PIP: Advance Strategic Plan goals by accelerating whole-building educational opportunities.													
Actual - In Progress													
WE&T Needs Assessment and WE&T PIP - Collaboration with WHPA WE&T Committees to develop QI/QM training.													
Actual - In Progress													
WE&T Needs Assessment and WE&T PIP - Collaboration with WHPA WE&T Committees to develop HVAC in Whole Building Performance training.													
Actual - In Progress													
WE&T Needs Assessment and WE&T PIP - Contractor/Owner: Introduce the HVAC trade to the Strategic Plan and their role in its implementation.													
Actual - In Progress													



<p>WE&amp;T Needs Assessment and WE&amp;T PIP - Building Officials: The program will actively work with the Statewide Codes and Standards program to support and develop meaningful strategies that provide QI and energy efficiency training for code officials and/or third-party inspectors and provide consistent interpretation and implementation of Title 24 during the inspection process.</p>	<p>Actual - In Progress</p>												
--	-----------------------------	--	--	--	--	--	--	--	--	--	--	--	--

**ENERGY EFFICIENCY PILOT PROGRAMS  
ANNUAL TARGET UPDATE 2011 REPORT**

**SOUTHERN CALIFORNIA GAS  
COMPANY**

**ENERGY EFFICIENCY PILOT  
PROGRAMS ANNUAL TARGET UPDATE**

**2011 REPORT**



**SOUTHERN CALIFORNIA GAS COMPANY  
2010-2012 ENERGY EFFICIENCY PORTFOLIO  
Pilot Programs Annual Target Update for 2011  
Submitted May 1, 2012**

**Sustainable Communities Pilot – SCG3645**

Southern California Gas Company’s (SoCalGas) Local Sustainable Communities program provides the framework for the design and building of communities that support the environment through energy- and resource-efficiency. Sustainable Communities helps to enhance quality of life by protecting and preserving natural resources and improving economic development. Incentives and other assistance are available to developers, building owners, and design teams that construct highly energy-efficient buildings with sustainable design, and long-term energy-efficiency.

This highly innovative program will be SoCalGas’ flagship program providing the path for all other programs in meeting California’s long-term energy efficiency goals, including zero net energy (ZNE) homes by 2020. This program will enable market transformation resulting in measurable energy efficiency, integrated demand response, distributed generation, renewables and natural resource savings while optimizing long term ecological, social and economic health of California. It accomplishes this by comprehensively integrating the “vertical” development (buildings and their components) with the “horizontal” development (land and utility and transportation infrastructure) over the full planning horizon. This holistic approach to program design and implementation is coupled with a new management model and evolutionary improvements in energy, water, and air quality savings over the project life.

**Program Performance Metrics**

<b>Sustainable Communities Case Studies Program</b>	<b>Program Target by 2012</b>
Savings By Design	75% of Commercial square footage at 20% better than Title 24
California Advanced Home Program	80% of New Homes at 20% better than 2008 Title 24
Zero Net Energy Home	20% of new homes to be ZNE by 2012

## **Progress towards meeting program metric goal**

The pilot project selected to participate in Sustainable Communities, Rancho Mission Viejo, did not progress as expected. The objectives filed for in the Sustainable Communities Program Implementation Plan were very much tied to the construction cycles of the selected pilot project. Because of the inactivity of the pilot project, Sustainable Communities terminated involvement in this project, and sought other alternative projects.

In 2011, SoCalGas evaluated three potential Sustainable Communities projects (Irvine Park, College of the Desert, and Paradise Valley) and identified Paradise Valley, a sustainable community project in the Palm Desert area, as a viable candidate. SoCalGas concluded a Memorandum of Understanding with Paradise Valley in 2011, and is providing design assistance through a consulting contract with KEMA, supported by Navigant Consulting on water related design issues. Navigant Consulting is also providing assistance in developing ZNE pathways for different types of homes (e.g., single family, multi-family, etc.) in different climate zones. The project is currently in design phase and is expected to commence construction of homes in 2015. Several design charrettes are planned for 2012. Training will include: training modules, in-person training, a digital learning center, and related hardware for the center.

SoCalGas is currently exploring another potential sustainable community project in Playa Vista. SoCalGas is also in discussions with Southern California Edison for three possible joint projects where natural gas savings are significant.

**JOINT IOU WORKFORCE EDUCATION &  
TRAINING PROGRAM ANNUAL REPORT  
STATEWIDE PROGRAM UPDATE FOR  
PROGRAM YEAR 2011**

# JOINT IOU WORKFORCE EDUCATION & TRAINING PROGRAM ANNUAL REPORT STATEWIDE PROGRAM UPDATE FOR PROGRAM YEAR 2011

SUBMITTED MAY 1, 2012

The Statewide Investor Owned Utilities (IOUs) Workforce Education and Training (WE&T) Program represents a portfolio of education, training and workforce development planning and implementation funded by or coordinated with the IOUs: Pacific Gas and Electric Company (PG&E), San Diego Gas and Electric (SDG&E), Southern California Edison (SCE), and Southern California Gas Company (SCG). Following the adoption of the California Long-Term Energy Efficiency Strategic Plan, Decision (D.) 09-09-047 approving 2010-2012 Energy Efficiency Portfolios and Budgets subsequently codified the statewide WE&T program as being responsible for the development, planning, and implementation of three subprograms:

The **WE&T Centergies** Sub-program is generally organized around market sectors and cross-cutting segments to facilitate workforce education and training appropriate to achieve the energy savings, demand reduction, and related energy initiatives required of the IOUs. Energy Centers represent the largest component of this sub-program. Included in this program are the Energy Center and Food Service Center activities.

The **WE&T Connections** Sub-program is organized around downstream and upstream IOU relationships with the educational sector, entry and intro-level community-based training efforts that support workforce development in energy efficiency, energy management, and new emerging green careers.

The **WE&T Strategic Planning and Implementation** Sub-program involves management and execution of several strategic statewide planning tasks and resulting project implementation actions initiated by the Strategic Plan: a) form an IOU/California Public Utilities Commission (CPUC) WE&T Task Force, b) conduct a Needs Assessment Study, c) facilitate Annual WE&T Public Meetings, and d) create a WE&T specific web portal.

## **WE&T Statewide Program Implementation Plan Target Update**

In 2011, the IOUs continued progress in meeting the quantitative targets provided in their respective Program Implementation Plan (PIP) for the WE&T Centergies subprogram. While objectives such as helping to improve the quality and qualifications of the green energy workforce, and increasing new pathways into energy efficiency careers have become additional aspirations, the IOUs are committed to compliance and achieving the goals originally set for the 2010-2012 program period. Training the workforce, educating workers through seminars on market and industry change, and offering hands-on consultation, demonstration, and presentations on equipment remain critical near-term metrics for attaining longer-term market transformation of seeing quality installation and comprehensive solutions in energy efficiency design. The state budget, national economic crises, and labor market instability have created challenges beyond the direct control of the IOUs, but implementing a sustainable, comprehensive, and transformative program remains the focus. Below are 2011 result tables for each of the IOUs toward meeting their 2011 PIP targets:

**Pacific Gas and Electric Company**

	Seminars	EE Consultations	Tool Loan Transactions/ Loaned Tools	Outreach	Total Attendance
2011	465	1,518	1,304/16,001	305	20,005
Goal	386	760	1,235/NA	245	NA

**San Diego Gas and Electric Company**

	Seminars	EE Consultations	Tool Loan Transactions/ Loaned Tools	Outreach	Total Attendance
2011	176	144	1,125/5,213	9	9,938
Goal*	150	300	NA	50	NA

\*Please note this includes seminars hosted by CCSE.

**Southern California Edison Company**

	Seminars	EE Consultations	Tool Loan Transactions/ Loaned Tools	Outreach	Total Attendance
2011	471	201	496/1,661	17	13,457
Goal	230	NA	NA	NA	NA

**Southern California Gas Company**

	Seminars	EE Consultations	Tool Loan Transactions/ Loaned Tools	Outreach	Total Attendance
2011	194	218	NA	40	16,483
Goal	150	95	NA	50	NA

As part of a statewide effort, Building Operator Certification (BOC) trainings were offered to commercial building operators, engineers, and facility managers as follows:

LOCATION	COURSE START DATE	NUMBER OF REGISTRANTS
<b>Level I</b>		
Downey BOC	January 12, 2011	25
Downey BOC	February 9, 2011	25
Long Beach BOC	March 3, 2011	30
Downey BOC	March 9, 2011	28
San Diego BOC	March 9, 2011	27
China Lake BOC	May 10, 2011	25
Ventura BOC	May 10, 2011	28
Irwindale BOC	May 11, 2011	24
Loma Linda BOC	June 22, 2011	22
San Ramon BOC	September 20, 2011	26
Porterville BOC	October 18, 2011	24
Oakland BOC	October 21, 2011	31
San Jose BOC	October 25, 2011	21
San Diego BOC	October 26, 2011	23
<b>Level II</b>		
San Francisco BOC	March 24, 2011	22
San Luis Obispo BOC	April 12, 2011	24
San Ramon BOC	May 10, 2011	13
Irwindale BOC	September 7, 2011	16
Downey BOC	September 8, 2011	25
Downey BOC	September 22, 2011	19
Downey BOC	October 19, 2011	22
Downey BOC	November 3, 2011	21
Downey BOC	November 17, 2011	20
Downey BOC	December 8, 2011	19
<b>TOTAL:</b>	<b>24 COURSES</b>	<b>560 REGISTRANTS</b>

BOC supported Energy Center program performance metrics under California's Energy Efficiency Strategic Plan through two education partnerships with PG&E to bring BOC training to community partners and disadvantaged communities. One partnership with San Luis Obispo provided BOC training to local government and K-12 operators. A second innovative partnership in Oakland, CA leveraged BOC to serve unemployed building operators with skill enhancement to make them more competitive in the job market. PG&E partnered with BOC, Laney College, and the Alameda County Workforce

Investment Board. SCE and the BOC program created a new partnership with Sierra View Hospital to provide BOC training at their facility in Porterville to make training more accessible for employees at that facility and employees from other surrounding areas.

### **Needs Assessment Recommendations Update**

D.09-09-047 also further clarified direction on the completion of a Needs Assessment to study “critical workforce needs” and to identify “opportunities to help identify and fulfill those needs through collaboration and fund sharing.”<sup>1</sup> D.09-09-047 also called for this Needs Assessment to include a “detailed inventory of...workforce education and training programs across the state and [the identification of] collaborative opportunities to make the three-year portfolio of IOU training programs responsive to Needs Assessment findings.”<sup>2</sup> Through a competitive bid process, the IOUs selected University of California at Berkeley (UC Berkeley) to complete the Needs Assessment Study. Collaborative efforts were made throughout the study process from initiation in 2009 to 2011, including: 1) updates at the quarterly WE&T Task Force meetings, 2) updates at the quarterly California Green Workforce Coalition meeting of Workforce Investment Boards (WIBs) and other community leaders and entities, 3) bi-weekly meetings with study manager, UC Berkeley and CPUC Energy Division staff, and 4) other community meetings where appropriate. The Needs Assessment Study was completed on March 17, 2011.

As mandated by D.09-09-047, a link was posted on [www.engage360.com](http://www.engage360.com) on March 17, 2011, and an invitation and questions related to a public workshop on the Needs Assessment was noticed to service lists in A.08-07-021 et al, R.07-01-041, R.08-03-008, and R.08-05-022. Participants were provided the opportunity to give their input on how to incorporate the findings of the Needs Assessment into the existing IOU WE&T programs, both verbally at the workshop and through an informal email comment period. Notes from the workshop were also circulated, and participants were given the opportunity to respond with revisions to ensure that the notes accurately captured the comments from the workshop. These public comments were generally supportive of recommendations from the Needs Assessment Study, and are summarized in Sections 1 to 10 below. As a general trend, it should be noted that three overarching themes surfaced throughout the recommendations and workshop comments: a focus on Sector Strategies, better collaboration, and enhanced data tracking.

The IOUs spent a significant amount of time during the course of the Needs Assessment and, through submittal of a joint advice letter (SDG&E 2260-E-B/2041-G-B, SCG 4249-B, SCE 2588-E-B, and PG&E 3212-G-B/3852-E-B), considering the recommendations and public comments and proposed changes to the WE&T Programs. The IOU changes that correspond to the Needs Assessment recommendations are summarized as follows:

---

<sup>1</sup> P.220

<sup>2</sup> P.220

	<i>Needs Assessment Topic</i>	<i>IOU Proposal</i>
1.	Support Sector Strategies	Develop and initiate Sector Strategies, test some proven concepts and refine as needed.
2.	Collaborate with Construction Trades	Engage with workforce organizations.
3.	Support Credentials and Certifications	Seek best comprehension and retention strategy.
4.	Restructure Classes	Assess feasibility of longer courses and series.
5.	Support Curricula Development	IOUs have an advisory role; can advise on how best to make curricula accessible.
6.	Inclusion of Disadvantaged Workers	Facilitate relationships with Disadvantaged groups.
7.	Evaluation of Workforce Outcomes	Seek feasible metrics.
8.	Collaborate with Education	This is an existing aspect of the program's strategy.
9.	Career Education	Incorporate career exploration into programs.
10.	Evaluation of K-12 Programs	Collect non-specific student data from schools.

## 1. Support Sector Strategies

The IOUs initiated steps to assess its application of strategic collaboration. Advice Letter SDG&E 2260-E-B/2041-G-B, SCG 4249-B, SCE 2588-E-B, and PG&E 3212-G-B/3852-E-B, describing plans for incorporating a Sector Strategies approach and describing how IOUs derive at changes to Energy Center training portfolios, was approved October 24, 2011. The advice letter provided a general template on plans of action for collaboration on Sector Strategies recommendations referenced in the Needs Assessment. In 2011, action steps initiated by the IOUs are included in this report and the attached Appendices.

Each of the IOUs created internal Sector Strategies launch teams. The teams were established to bring together internal IOU representatives from different disciplines of the respective IOU organizations. The launch teams were used to identify and clarify various goals and objectives across programs, but also to identify common goals and objectives among them all. The importance of this first effort was to provide a clearer and more comprehensive workforce training strategy for the purpose of being able to provide strategic guidance to external stakeholders with whom IOUs might collaborate.

Collaboration teams on Sector Strategy recommendation areas are to be formed with external stakeholder groups and are to be integrated with the IOU representatives during the first half of the year in 2012. The internal workforce collaborative groups provided an early framework, and possible

governance for IOUs to manage Sector Strategies initiatives, and possibly, managing statewide stakeholder collaboration on Needs Assessment workforce recommendations.

IOU representatives are leads on Sector Strategies statewide teams that will work with other workforce, education and training stakeholders to address specific recommendations in the Needs Assessment study. The respective internal launch teams form the core for initiating regional initiatives or IOU specific applications from outcomes delivered by the statewide Sector Strategies teams.

The IOUs developed a functional structure of how it planned to manage a Sector Strategies approach and presented this information at the WE&T statewide taskforce meeting held on January 26, 2012.

Sector Strategies are a challenging concept with respect to education institution collaboration. The IOUs are evaluating the following areas for applicability of a Sector Strategies approach:

Grades K-4 – Career Awareness: Students develop an awareness of careers that might interest them.

Grades 5-8 – Career Exploration: Students explore and become aware of careers.

Grades 9-12 – Career Preparation: Students develop basic career related technical skills, knowledge and soft skills necessary to obtain, retain or change careers.

Sector Strategies approach could help build a pipeline toward California meeting the 2020 goal to have a workforce that is trained and fully prepared to achieve California's economic energy efficiency and demand-side management potential.

The IOUs are currently collaborating with the largest community college system in the nation, with over 112 campuses. With the California Community Colleges Chancellor's office, IOUs are designing and implementing community college programs that prepare students for sector specific careers, while also helping to provide students with credentials to help transfer to four-year institutions. Furthermore, the California Community Colleges are working closely with the WIBs with whom IOUs are also working directly with on projects to meet Energy and Utility sector strategy objectives.

Community colleges prepare students for entry-level jobs, provide experienced workers with opportunities, and prepare students for advanced education in technical disciplines. The IOUs, in collaboration with community colleges, are supporting developing sector specific courses and programs that will help meet industry/employer needs.

## **2. Collaborate with Construction Trades**

The IOUs continue to evaluate existing training partnerships within the IOU demand side management programs and external partners to look for opportunities to optimize alignment with strategic objectives and the recommendations of the Needs Assessment.

The IOUs began an assessment of the trade group relationships with whom they partner. IOU plans with regard to trade group relationships entail building relationships that allow for quick access to curriculum

or accelerated curriculum development. Preparing for next step actions in 2012, the IOUs have identified a preliminary IOU working group to evaluate existing WE&T Centergies partnerships. As part of the WE&T Task Force Meeting held January 26, 2012, the IOUs solicited additional participation from stakeholders who have an interest in coordinating partnerships going forward.

### **3. Support Credentials and Certifications**

The IOUs continue to increase efforts at their Energy Centers to offer courses which lead to certifications or support certification programs.

The IOUs identified certificate programs and certification organizations they are currently supporting, as well as the level of support provided. In addition, the IOUs began discussions on the adequateness of the certificate/organization to the overall Needs Assessment. Each of these actions is necessary for deciding which relationships to continue and establishing criterion for selecting future offerings. The IOUs are trying to get to a point of statewide consistency in quality curriculum, standards and certifications applicable across all IOU programs and other credentialing that is regionally or specific to an IOU. The IOUs have identified programs either already statewide or that could be adopted by the IOUs:

- Building Operator Certification
- North American Technician Excellence (NATE)
- California Advanced Lighting Controls Training Program (CALCTP)
- Home Energy Rating System Program (HERS)
- American Institute of Architects
- US Green Building Council

Some programs such as partnerships with regional universities and community colleges would remain regional given the nature of the partnership and/or demand for that credential or certificate. Further work to establish criteria whether certification or credential programs are best as regional was still underway at the end of 2011.

### **4. Restructure Classes**

The IOUs continue to be proactive in identifying areas of Energy Center training portfolios appropriate for restructure, modification and development to meet changing industry, employer and market demands. IOUs have been exchanging ideas on how to identify, monitor and anticipate advancing codes and standards, emerging technologies, certification requirements, CPUC goals and mandates.

Thoughtful content and consideration is being applied during development of all new seminars. The IOUs will schedule and place courses onto calendars well in advance of the start of a new year. Newly required courses during the course of the year will often require between 3-6 months to develop, schedule, promote, and register attendees.

The IOUs have discussed and shared insight on educational series that each has embarked upon during 2011. Many of the existing course series has been IOU-specific, in many cases developed in-house and before the Needs Assessment. In response to the Needs Assessment, the IOUs have identified course structure for 2012 as an area where a sector strategies approach is ideal.

In 2012, the IOUs will assess existing IOU-specific course series and engage with stakeholders on expanding course curriculum for broader dissemination across the state. Course series that could be expanded across the IOUs in the next Energy Efficiency funding cycle include:

- Lighting Academy
- Small/medium business commercial building audits
- Building commissioning

## **5. Support Curricula Development**

The IOUs continued efforts in the development and updating of training curricula and continue to work with various trade partners, external parties and subject matter experts (SMEs) to further the development of seminars and classes offering trade certifications and Integrated Demand Side Management (IDSMS) application. The IOUs are also working with trade partners on creating trade progression pathways. The IOUs continue to explore with Emerging Technology, New Construction, and Codes & Standards organizations on workforce planning around a variety of potential technologies that could require an accelerated workforce training ramp-up.

## **6. Inclusion of Disadvantaged Workers**

For inclusion of disadvantaged workers within the scope of Sector Strategy development, the IOUs have identified a preliminary working group to evaluate existing partnerships. The team will focus on best practices to coordinate program offerings and outreach to draw participation from disadvantaged workers toward accomplishing mutual benefits of supporting workers re-entry into employment and achievement of IOU program goals. The IOU working group held its first convening meeting, January 11, 2012. As part of the WE&T Task Force Meeting held January 26, 2012, the IOUs solicited additional participation from stakeholders who have an interest in coordinating partnerships going forward.

## **7. Evaluation of Workforce Outcomes**

IOUs are assessing and evaluating requirements for redesigning the registration system and participant information collection methods statewide among IOUs.

The IOUs have jointly identified new tracking data requirements for consideration to support the needs assessment findings. The new tracking requirements will be decided during the first quarter of 2012 to allow for implementation starting later in 2012. In addition, the IOUs submitted a comprehensive process evaluation plan, approved by Energy Division, with Opinion Dynamics Corporation (ODC) as the study team to conduct a comprehensive assessment of progress to date and gap identification. This study is expected to be completed in 2012, with a provision for early debriefing during the first half of 2012.

## **8. Collaborate with Education**

The IOUs are continuing current work with secondary and post-secondary institutions.

The IOUs focused on expanding and/or infusing energy efficiency, demand response, distributed generation, and green career awareness into curriculum and related activities that inspire interest in energy careers, new and emerging technology, as well as skills to advance the energy initiatives and goals within the K-12 educational sector and provide information to increase awareness of introductory-level community-based training efforts.

#### K-12

The IOUs are continuing to work with our educational partners on revisions to educational materials to include content on energy fundamentals, energy efficiency, demand response, as well as energy and utility sector career awareness, career exploration and career preparation. Work will continue through 2012.

#### Community Colleges

Energy education program launched to serve the community college sector and meet the Needs Assessment recommendations. This program promotes energy efficiency awareness through education, engages students and encourages hands-on participation, and provides green workforce exposure and career opportunities. This program was initiated in the third quarter of 2011 and will continue into 2012.

#### Colleges/Universities

The IOUs support the statewide Green Campus program managed by The Alliance to Save Energy on 16 universities and colleges, funding nearly 100 interns each year. The program engages students in building pathways to green careers and realizing measurable energy savings. The program continues through 2012.

### **9. Career Education**

The IOUs proposed that future curriculum development needs to include input and funding from other relevant stakeholders to identify other secondary energy and environmental curricula that meet the goals of the Strategic Plan. The IOUs continue to support various outside stakeholders such as El Camino Community College's Summer Utilities Responsive Training (SURT), an intense 10 week summer program for disadvantaged students. The program helps develop skills toward a career in Energy Efficiency. Science Technology Engineering and Math (STEM) program in San Bernardino County is a three day program geared as a train-the-trainer program to educate and increase student awareness and provide fundamental education that will enhance energy efficient careers. The IOUs continue talks with other local Community Colleges regarding course development involving energy related careers, as well as course curriculum on for Solar Installers.

Additionally, the IOUs have applied an age appropriate Sector Strategy approach around Career Education by ensuring that age appropriate career education is incorporated into all IOU programs grades K-College while leveraging the expertise and resources of partnership organizations with similar goals and objectives.

While career education was incorporated into programs in 2010, career education was strengthened into the existing programs during 2011 through updates to existing curriculum, inclusion in new programs being developed, in standalone green career guide/supplements, and assemblies.

## **10. Evaluation of K-12 Programs**

The IOUs are pursuing solutions to address the recommendation.

The IOUs submitted a comprehensive process evaluation plan, approved by Energy Division, with ODC as the study team to conduct a comprehensive assessment of progress to date and gap identification. This study is expected to be completed in 2012, with a provision for early debriefing during the first half of 2012.

### **Specific IOU Activities**

For more information regarding IOU-specific activities in 2011 to support the Needs Assessment Recommendations, please refer to Appendices A, B, C and D.

**Appendix A**

**Pacific Gas and Electric Company  
2011 Needs Assessment Activities**

Recommendation	PG&E 2011 Activities
All	<ul style="list-style-type: none"> <li> <p><b>• Initiate internal IOU Launching Team for each needs assessment recommendation area</b></p> <p>PG&amp;E has identified and assigned WE&amp;T leadership among Connections and Centergies staff to work with other IOUs</p> </li> <li> <p><b>• Develop IOU specific and general sector strategy Goals &amp; Objectives</b></p> <p>PG&amp;E has put together a team of staff members to continue to develop strategies and goals to be associated with the sector strategies identified by the Needs Assessments. We have also created contracts with entities specializing in “sector strategies” and “adult learning theory” to assist in identifying areas we can improve upon going into 2012.</p> </li> <li> <p><b>• Initiate activities outlined by the General Timeline in preparation for development 2012 Q1-Q2 detailed and specific work product</b></p> <ul style="list-style-type: none"> <li> <p><b>• Ensure to include statewide IOU goals as well as those for relevant specific IOU/programs that are not in their nature “statewide”</b></p> <p>In 2011, PG&amp;E has embarked upon work, goals, and milestones it has set for itself for the first half of 2012. Such activities include development of MOUs, meetings with potential partners, and writing contracts with organizations to deliver on specific trainings.</p> </li> </ul> </li> </ul>
Collaborate with Construction Trades	<ul style="list-style-type: none"> <li> <p><b>• Develop a list of construction trade organizations within the service territory</b></p> <p>We have developed a spreadsheet to identify potential trades and contacts to reach out to in order to create a comprehensive list of potential partners. We will then identify needs associated with their groups to insure our offerings are tailored to service those needs.</p> <p>We will continue to work with existing partners such as NATE and BPI to insure we offer the maximum amount of classes relevant to their certification process. We also propose reaching out to other trade affiliations to meet their continuing education needs in 2012.</p> <p>We are currently working with the following trade organizations:</p> <ul style="list-style-type: none"> <li>○ International Brotherhood of Electrical Workers</li> <li>○ National Electrical Contractors Association</li> <li>○ Sheet Metal and Air Conditioning Contractors Association</li> </ul> </li> </ul>

<p><b>Support Certifications &amp; Credentials</b></p>	<ul style="list-style-type: none"> <li>• <b>Continue to support existing credential/certification partners</b></li> </ul> <p>We continue to map out our existing courses to insure that we capture all available benefit from those courses, such as ZNE, ACCA and New Construction, and also modify existing curricula to complement their efforts. Our current collaborations include:</p> <ul style="list-style-type: none"> <li>○ Building Operator Certification</li> <li>○ California Advanced Lighting Controls Training Program</li> <li>○ American Institute of Architects (continuing education credentials)</li> <li>○ California State University East Bay (IDSM Certificate Program)</li> <li>○ NATE</li> <li>○ BPI</li> <li>○ HERS</li> </ul> <p>PG&amp;E is developing new partnerships and potential new certifications with Skyline College and San Francisco City College for Small/Medium Commercial Energy Audits Certificate.</p>
<p><b>Restructure Classes</b></p>	<ul style="list-style-type: none"> <li>• <b>IOUs will each map out existing course offerings to inform future restructuring of classes to support course series</b></li> </ul> <p>PG&amp;E has mapped out existing and future course offerings for tracks including building performance, architecture, and renewables.</p> <p>Small-Medium Commercial Building Audits series</p> <p>Existing Building Commissioning Workshop Series</p> <ul style="list-style-type: none"> <li>• <b>Assess existing course series at each IOU and determine which can be replicated</b></li> </ul> <p>PG&amp;E’s list of courses was provided in Attachment D to the joint WE&amp;T Advice Letter (PG&amp;E Advice 3212-G-G/3852-E-B). PG&amp;E plans to work closely with partner IOUs to ensure efforts undertaken, such as SCG’s NATE Program, are replicated when applicable to PG&amp;E’s offerings.</p> <p>PG&amp;E has identified the Small/Medium Business Audits training series and its year-long Existing Building Commissioning two series of classes that are applicable across all IOUs and is in the process of organizing it into a cohesive series. PG&amp;E is willing to share this material, but appropriate trainers at other IOUs will need to be identified.</p> <p>Other course series include Energy Fundamentals which is under development for on-demand delivery.</p>
<p><b>Recommendation</b></p>	<p><b>IOU Proposed Activities to be completed by END of DECEMBER 2011</b></p>
<p><b>Inclusion of Disadvantaged Workers</b></p>	<ul style="list-style-type: none"> <li>• <b>Inventory current network of partnerships with organizations serving low-income and disadvantaged workers engaging with Energy Centers training centers or other utility initiatives</b></li> </ul> <p>PG&amp;E is currently continuing its efforts to inventory existing organizations serving the communities within its service territory as well as reaching out to other groups</p>

	<p>operating within the territory</p> <ul style="list-style-type: none"> <li>• <b>Assess these partnerships to identify respective influence within each sector, potential expansion opportunities, and resource requirements</b></li> </ul> <p>In addition to our PowerPathway efforts with Community Colleges, we will expand to include other training centers within our service territory to insure our courses and efforts touch as many disadvantaged communities as possible. We also plan to continue to work with Workforce Investment Boards (WIBs) within our service area and continue to replicate our efforts with the San Francisco Office of Employment Workforce Development, to build on progress made as part of the SFOEWD/Low Income Energy Efficiency/Workforce Education and Training pilot program to articulate with third party training entities for weatherization. This effort resulted in partnerships leading directly to employment of disadvantaged youths.</p> <p>PG&amp;E has identified and started discussions with several organizations that serve the low-income/disadvantaged workers, including:</p> <ul style="list-style-type: none"> <li>○ Job Train</li> <li>○ Rebuilding Together San Francisco and Oakland</li> <li>○ Asian Neighborhood Design</li> <li>○ Alameda County Workforce Investment Board</li> <li>○ Building Operator Certification program</li> </ul> <p>PG&amp;E training centers have partnered with the PG&amp;E PowerPathway team to identify four new partners in 2012 who serve disadvantaged communities in various parts of the service territory.</p>
<p><b>Collaborate with Education</b></p>	<ul style="list-style-type: none"> <li>• <b>Identify educational conferences to attend in 2012</b></li> </ul> <p>PG&amp;E Connections staff has identified educational conferences for 2012.</p> <ul style="list-style-type: none"> <li>• <b>Identify potential schools with targeted populations (Title 1) and free and reduced meal prices through 2012</b></li> </ul> <p>PG&amp;E Connections staff maintains a list of schools in the PG&amp;E service area that are Title 1 that will be used to market to in the first quarter of 2012 on the Energenius program.</p> <ul style="list-style-type: none"> <li>• <b>Review list of current partners and potential collaboration opportunities that would be the most effective partners through 2012</b></li> </ul> <p>PG&amp;E Connections staff maintains a list of all the partners/collaborations for each of the school programs managed by staff and intends to use these to identify the most effective partners through 2012.</p>
<p><b>Career Education</b></p>	<ul style="list-style-type: none"> <li>• <b>Support existing ongoing efforts to incorporate career education into K-8 curriculum programs</b></li> </ul> <p>PG&amp;E Connections staff made progress in this area as follows:</p> <ul style="list-style-type: none"> <li>○ Assembled internal committee</li> <li>○ Continued to track collaborations/partners for all school programs.</li> <li>○ Assembled all the contact information for the ROP programs and Energy related academies and have draft of the Green Resource guide (PG&amp;E).</li> <li>○ Completed and implemented PEAK Career Explorer guide has been completed and implemented.</li> <li>○ Identified organizations /agencies that support K-8 career education.</li> </ul>

- Identified whom to collaborate with to leverage career education resources that can be shared with K-12 schools and Community Colleges.
- Infused language into the existing curriculum that is age appropriate on career awareness and career exploration. Energenius program is developing standalone career awareness supplements for each of their units.

**Appendix B**

**San Diego Gas and Electric Company  
2011 Needs Assessment Activities**

Recommendation	SDG&E 2011 Activities
All	<ul style="list-style-type: none"> <li> <p><b>• Initiate internal IOU Launching Team for each needs assessment recommendation area</b></p> <p>The California IOU’s agreed on how to define Sector Strategies.</p> <p>SDG&amp;E has identified and assigned WE&amp;T leadership among Connections and Centergies staff to work with other IOUs.</p> </li> <li> <p><b>• Develop IOU specific and general sector strategy Goals &amp; Objectives</b></p> <p>SDG&amp;E team has identified their sector strategies and is reviewing existing courses that may be modified and improved in the 2012 program. SDG&amp;E plans to start implementation of a sector strategy approach into its curriculum by the start of 3<sup>rd</sup> quarter 2012. SDG&amp;E’s sector strategy topics are: Lighting Technologies, Building Envelope, Standards and Software, Energy Cost Management, Energy Strategies, HVAC Systems and Technologies, Commercial &amp; Industrial Technology, Food Service Technology, and Renewable and Sustainability. Potential sector strategy topics to explore in 2012 include Green jobs and Residential Energy Management.</p> </li> <li> <p><b>• Initiate activities outlined by the General Timeline in preparation for development 2012 Q1-Q2 detailed and specific work product</b></p> <p>SDG&amp;E will continue to work on promoting sector relevant training to external stakeholder organizations such as industry trade associations, contractor and construction trade groups, community colleges, and universities, among others.</p> </li> <li> <p><b>• Ensure to include statewide IOU goals as well as those for relevant specific IOU/programs that are not in their nature “statewide”</b></p> <p>In 2011, SDG&amp;E continues to collaborate with the other IOU’s to develop goals and set milestones for the WET program. During 2011, SDG&amp;E identified potential partners to work with during 2012 in reviewing existing training that was specific to the sector strategies that were identified and deliver specific training.</p> </li> </ul>
Collaborate with Construction Trades	<ul style="list-style-type: none"> <li> <p><b>• Develop a list of construction trade organizations within the service territory</b></p> <p>In 2011, SDG&amp;E continued to work with and strengthen partnerships with construction trade organizations Northeastern Energy Efficiency Council (NEEC), who sponsors the BOC certification program, and International Heating Air Conditioning Industries (IHACI), who provides the NATE training. In 2012, SDG&amp;E is identifying qualifying criteria for new partnerships in the construction trades and plans to have a list ready by the end of the 2<sup>nd</sup> quarter 2012.</p> </li> </ul>

<p><b>Support Certifications &amp; Credentials</b></p>	<ul style="list-style-type: none"> <li>• <b>Continue to support existing credential/certification partners</b></li> </ul> <p>SDG&amp;E recognizes that certifications play a critical role in career development and in creating new or supporting existing partnerships with other organizations. SDG&amp;E has supported and will continue to support existing partnerships in offering certifications. In 2011, SDG&amp;E offered, in partnership with workforce training organizations, the following certifications and credentials:</p> <ul style="list-style-type: none"> <li>○ Building Operator Certification (BOC), NEEC, 2 Level I courses</li> <li>○ North American Technician Excellence (NATE), IHACI</li> <li>○ Introduction to Sustainability, UC San Diego Extension</li> <li>○ Continuing Education Units (CEU) through California State University San Marcos</li> <li>○ Leadership in Energy and Environmental Design (LEED) Accredited Professional, US Green Building Council (USGBC)</li> <li>○ LEED Green Associates, USGBC</li> </ul> <p>During the 2<sup>nd</sup> quarter 2012, SDG&amp;E plans to partner with Cuyamaca College to offer the California Advanced Lighting Controls Training Program (CALCTP) certification. In addition, in 2012, SDG&amp;E will partner with the American Institute of Architects (AIA) - San Diego Chapter to provide continuing education units for qualifying SDG&amp;E Workforce Education &amp; Training courses.</p> <p>SDG&amp;E will continue to look for opportunities to partnering with new organizations that may offer certification and expand into different energy efficiency sectors.</p>
<p><b>Restructure Classes</b></p>	<ul style="list-style-type: none"> <li>• <b>IOUs will each map out existing course offerings to inform future restructuring of classes to support course series</b></li> </ul> <p>SDG&amp;E has mapped out existing and future course offerings based on sector strategies and have identified potential partners. This effort could assist fostering educational relationships in developing course series.</p> <ul style="list-style-type: none"> <li>• <b>Assess existing course series at each IOU and determine which can be replicated</b></li> </ul> <p>In 2011, initial conversations were conducted with existing WE&amp;T instructors to determine which classes would be best suited for modifying to qualify for Adult Learning Principles, including longer course series and hands on learning. For example, in early 2011, SDG&amp;E hosted both half-day and full-day benchmarking classes. Working with the benchmarking instructor, this class was expanded to a certificate course, offered to San Diego State University (SDSU) students in 1st quarter 2012. Students participated in the 9-week course in which they benchmarked their own university, providing them hands-on experience.</p>
<p><b>Recommendation</b></p>	<p><b>IOU Proposed Activities to be completed by END of DECEMBER 2011</b></p>
<p><b>Inclusion of Disadvantaged Workers</b></p>	<ul style="list-style-type: none"> <li>• <b>Inventory current network of partnerships with organizations serving low-income and disadvantaged workers engaging with Energy Centers training centers or other utility initiatives</b></li> </ul> <p>In 2011, SDG&amp;E worked with internal stakeholders to compile a list of existing agencies that serve disadvantaged workers within our community. In 2012, SDG&amp;E</p>

	<p>plans to work with the other IOUs to develop criteria for a more robust list of potential partners who can assist with outreach to and inclusion of the disadvantaged workforce.</p> <ul style="list-style-type: none"> <li>• <b>Assess these partnerships to identify respective influence within each sector, potential expansion opportunities, and resource requirements</b></li> </ul> <p>SDG&amp;E is in discussion with internal partners that have developed a working relationship with organizations that serve disadvantaged workers. The idea is to look at existing programs and see if there is any opportunity to expand training. For example, look at any SDG&amp;E third party programs and see if we can enhance efforts toward the inclusion of disadvantaged workers.</p>
<p><b>Collaborate with Education</b></p>	<ul style="list-style-type: none"> <li>• <b>Identify educational conferences to attend in 2012</b></li> </ul> <p>Connections staff has identified educational conferences for 2012.</p> <ul style="list-style-type: none"> <li>• <b>Identify potential schools with targeted populations (Title 1) and free and reduced meal prices through 2012</b></li> </ul> <p>SDG&amp;E has identified potential schools with targeted populations to continue to market and promote.</p> <ul style="list-style-type: none"> <li>• <b>Review list of current partners and potential collaboration opportunities that would be the most effective partners through 2012</b></li> </ul> <p>SDG&amp;E has reviewed its current list of partners and continues to maintain the list by identifying potential opportunities for effective partnerships.</p>
<p><b>Career Education</b></p>	<ul style="list-style-type: none"> <li>• <b>Support existing ongoing efforts to incorporate career education into K-8 curriculum programs</b> <ul style="list-style-type: none"> <li>○ Assembled internal committee.</li> <li>○ Continued to track collaborations/partners for all school programs.</li> <li>○ Assembled all the contact information for the ROP programs and Energy related academies and have draft of the Green Resource guide (PG&amp;E).</li> <li>○ Completed and implemented PEAK Career Explorer guide has been completed and implemented.</li> <li>○ Identified organizations /agencies that support K-8 career education.</li> <li>○ Identified whom to collaborate with to leverage career education resources that can be shared with K-12 schools and Community Colleges.</li> <li>○ Infused language into the existing curriculum that is age appropriate on career awareness and career exploration. Energenius program is developing standalone career awareness supplements for each of their units.</li> </ul> </li> </ul> <p>SDG&amp;E has:</p> <ul style="list-style-type: none"> <li>○ Continued to track collaborations/ partners with school programs.</li> <li>○ Completed and implemented the PEAK Career Explorer.</li> <li>○ Identified and continues to explore organizations/ agencies that support K-12 career education.</li> <li>○ Identified and continues to explore potential partnerships to leverage career education resources that can be shared with K-12 schools and Community Colleges.</li> <li>○ Infused language into existing curriculum that is age appropriate on career awareness and career exploration.</li> </ul>

**Appendix C**

**Southern California Edison Company  
2011 Needs Assessment Activities**

Recommendation	SCE 2011 Activities
<p><b>All</b></p>	<ul style="list-style-type: none"> <li>• <b>Initiate internal IOU Launching Team for each needs assessment recommendation area</b> SCE has identified and assigned WE&amp;T leadership among Connections and Centergies staff to work with other IOUs.</li> <li>• <b>Develop IOU specific and general sector strategy Goals &amp; Objectives</b> SCE has put together a team of staff members to continue to develop strategies and goals to be associated with the sector strategies identified by the Needs Assessments.</li> <li>• <b>Initiate activities outlined by the General Timeline in preparation for development 2012 Q1-Q2 detailed and specific work product</b> <ul style="list-style-type: none"> <li>• <b>Ensure to include statewide IOU goals as well as those for relevant specific IOU/programs that are not in their nature “statewide”</b></li> </ul> </li> </ul> <p>In 2011, SCE has embarked upon work, goals, and milestones it has set for itself for the first half of 2012. Such activities include development of MOUs, meetings with potential partners, and development of plans with organizations to deliver on specific trainings.</p>
<p><b>Collaborate with Construction Trades</b></p>	<ul style="list-style-type: none"> <li>• <b>Develop a list of construction trade organizations within the service territory</b> We have developed a spreadsheet to identify potential trades and contacts to reach out to in order to create a comprehensive list of potential partners. We will then identify needs associated with their groups to insure our offerings are tailored to service those needs.</li> </ul> <p>We will continue to work with existing partners such as NATE, IHACI, CBPCA, CALCERTS, and CONSOL to insure we offer the maximum amount of classes relevant to their certification process. We also propose reaching out to other trade affiliations to meet their continuing education needs in 2012.</p>

<b>Support Certifications &amp; Credentials</b>	<ul style="list-style-type: none"> <li>• <b>Continue to support existing credential/certification partners</b>  We continue to map out our existing courses to insure that we capture all available benefit from those courses, such as ZNE, ACCA and New Construction, and also modify existing curricula to complement their efforts. Our current collaborations include: <ul style="list-style-type: none"> <li>○ Building Operator Certification</li> <li>○ California Advanced Lighting Controls Training Program</li> <li>○ American Institute of Architects (continuing education credentials)</li> <li>○ United States Green Building Council</li> <li>○ NATE</li> <li>○ BPI</li> <li>○ HERS</li> </ul> </li> </ul> <p>SCE is developing new partnerships and potential new certifications with California State University San Marcos for continuing education units.</p>
<b>Restructure Classes</b>	<ul style="list-style-type: none"> <li>• <b>IOUs will each map out existing course offerings to inform future restructuring of classes to support course series</b>  SCE has mapped out existing and future course offerings for tracks including a Lighting Academy, Programmable Logic Controllers, and Zero Net Energy.</li> <li>• <b>Assess existing course series at each IOU and determine which can be replicated</b>  We plan to work closely with our partner IOUs to leverage efforts they have undertaken, such as PG&amp;E's Photovoltaic trainings and make available at SCE's energy education centers.</li> </ul> <p>SCE recently developed a Programmable Logic Controller series, and has identified it as curriculum that has value statewide. SCE is willing to share this material, but will need funding support from the other IOUs.</p>

Recommendation	IOU Proposed Activities to be completed by END of DECEMBER 2011
<p>Inclusion of Disadvantaged Workers</p>	<ul style="list-style-type: none"> <li>• <b>Inventory current network of partnerships with organizations serving low-income and disadvantaged workers engaging with Energy Centers training centers or other utility initiatives</b></li> </ul> <p>SCE is currently continuing its efforts to inventory existing organizations serving the communities within its service territory as well as reaching out to other groups operating within the territory.</p> <ul style="list-style-type: none"> <li>• <b>Assess these partnerships to identify respective influence within each sector, potential expansion opportunities, and resource requirements</b></li> </ul> <p>In addition to current partnerships, SCE will expand to include other training centers within our service territory to insure our courses and efforts touch as many disadvantaged communities as possible. We also plan to continue to work with WIBs, the Energy Savings Assistance Program, and local community based organizations with their DSM training efforts where opportunities exist.</p> <p>SCE has identified and started discussions with several organizations that serve the low-income/disadvantaged workers, including:</p> <ul style="list-style-type: none"> <li>○ Proteus, Inc.</li> <li>○ Community Service Employment Training</li> <li>○ Taller San Jose</li> </ul>
<p>Collaborate with Education</p>	<ul style="list-style-type: none"> <li>• <b>Identify educational conferences to attend in 2012</b></li> </ul> <p>Connections staff has identified educational conferences for 2012.</p> <ul style="list-style-type: none"> <li>• <b>Identify potential schools with targeted populations (Title 1) and free and reduced meal prices through 2012</b></li> </ul> <p>Connections staff maintains a list of schools in the PG&amp;E service area that are Title 1 that will be used to market to in the 1<sup>st</sup> quarter of 2012 on the Energenius program.</p> <ul style="list-style-type: none"> <li>• <b>Review list of current partners and potential collaboration opportunities that would be the most effective partners through 2012</b></li> </ul> <p>Connections staff maintains a list of all the partners/collaborations for each of the school programs managed by staff and intends to use these to identify the most effective partners through 2012.</p>
<p>Career Education</p>	<ul style="list-style-type: none"> <li>• <b>Support existing ongoing efforts to incorporate career education into K-8 curriculum programs</b></li> </ul> <ul style="list-style-type: none"> <li>○ Assembled internal committee.</li> <li>○ Continue to track collaborations/partners of all school programs.</li> <li>○ Completed and implemented PEAK Career Explorer guide has been completed and implemented.</li> <li>○ Identified organizations /agencies that support K-8 career education.</li> <li>○ Identified whom to collaborate with to leverage career education resources that can be shared with K-12 schools and Community Colleges.</li> <li>○ Infused language into the existing curriculum that is age appropriate on career awareness and career exploration.</li> </ul>

**Appendix D**

**Southern California Gas Company  
2011 Needs Assessment Activities**

Recommendation	SCG 2011 Activities
All	<ul style="list-style-type: none"> <li>• Initiate internal IOU Launching Team for each needs assessment recommendation area  Recruited SCG Internal collaborative (Single Team to address needs assessment recommendations holistically in implementing regional Sector Initiative). 1/12/2012 Kickoff Meeting</li> <li>• Develop IOU specific and general sector strategy Goals &amp; Objectives, Success Factors [Preliminary Evaluation Measurements]  2/14/2012 Meeting:                             <ul style="list-style-type: none"> <li>○ Began assessing appropriate scope for SCG Sector Strategy implementation</li> <li>○ Began assessing scale for SCG Sector Strategy implementation</li> <li>○ Ensure to include statewide IOU goals as well as goals and objectives for relevant specific IOU / programs that are not in their nature “statewide”</li> </ul>  Included as part of 1/12/2012 meeting Agenda/Report documents.                               <li>• Initiate activities outlined by the General Timeline in preparation for development 2012 Q1-Q2 detailed and specific work product.  WE&amp;T Taskforce Meeting 1/26/2012</li> </li></ul>
Sector Initiative	<ul style="list-style-type: none"> <li>• Statewide IOU Convening  Kickoff Meeting 1/9/2012  Regional stakeholder meeting with SCE TBD - pending 2013-2014 PD approved guidance</li> <li>• Initiate activities outlined by the General Timeline in preparation for development 2012 1<sup>st</sup> quarter - 2<sup>nd</sup> quarter detailed and specific work product.  WE&amp;T Taskforce Meeting 1/26/2012</li> </ul>
Collaborate with Construction Trades	<ul style="list-style-type: none"> <li>• Develop a list of construction trade organizations within the service territory  SCG partners with various trade associations: HVAC; Steam; Local 501 Operating Engineers Joint Apprenticeship Program; SCG continues to work with IHACI to develop HVAC training that meets California Quality Installation and Quality Maintenance requirements. In addition WE&amp;T collaborates with the CA Concrete Producers and the CA Metals Coalition to host annual trade meetings.</li> </ul>

<p><b>Support Certifications &amp; Credentials</b></p>	<ul style="list-style-type: none"> <li>• Continue support of existing credential/certification partners                      SCG offers training seminars designed to assist attendees in obtaining various certifications: North American Technician Excellence (NATE), Department of Energy (DOE) Steam Specialist, Process Heating; Compressed Air; Green Building Professional and Green Associate Certification; Building Operators Certification (BOC), LA Steam License Engineer; Certified Energy Manager; and Infrared Camera certification.                       SCG continues to offer various seminars providing Continuing Education Units (CEUs) and contact hours for recertification: American Institute of Architects (AIA), Green Building Certification Institute (GBCI) Credential Maintenance, North American Technician Excellence (NATE), Department of Health Services (DPHS), and Certified Energy Manager (CEM).</li> <li>• Identify other potential credential/certifications partners                      SCG is working with various HVAC agencies and municipalities to develop further certification and credentialing programs in support of Residential Energy Update California (EUCa) Program and guidance from Codes and Standards Program (re: Code cycle changes).</li> </ul>
<p><b>Restructure Classes</b></p>	<ul style="list-style-type: none"> <li>• IOUs will each map out existing course offerings to inform future restructuring of classes to support course series                      SCG continues to be proactive in identifying areas of its training portfolio appropriate for restructure, modification and development to meet changing industry, employer and market demands.</li> <li>• Assess existing course series at each IOU and determine which can be replicated                      The IOUs have been exchanging ideas on how to identify, monitor and anticipate advancing codes and standards, emerging technologies, certification requirements, CPUC goals and mandates.</li> </ul>
<p><b>Curriculum Development</b></p>	<ul style="list-style-type: none"> <li>• Develop IOU specific Goals &amp; Objectives                      SCG is also working with its trade partners to develop trade progression pathways such as:                      Boilers Basics &gt; Combustion Principles &gt; Boiler Water Treatment &gt; LA Steam License Series &gt; DOE Steam Specialist.</li> <li>• Initiate activities outlined by the General Timeline in preparation for development 2012 Q1-Q2 detailed and specific work product.                      SCG continues to work with various trade partners, external parties and subject matter experts (SME's) to further the development of seminars and classes offering trade certifications and IDSM application. SCG continues to explore with Emerging Technologies future workforce needs for CoGeneration, Fuel Cells, and Geothermal Technologies. SCG is also exploring opportunities with trade partners to further develop advanced HVAC certifications.</li> </ul>
<p><b>Inclusion of Disadvantaged Workers</b></p>	<ul style="list-style-type: none"> <li>• Inventory current network of partnerships with organizations serving low-income and disadvantaged workers engaging with Energy Centers training centers or other utility initiatives                      SCG continues to explore contacts within the various agencies including the LA Chamber of Commerce, Workforce Investment Boards (WIB) and the local Job</li> </ul>

	<p>Corps- to develop curricula and training targeting different classifications of disadvantaged workers.</p> <ul style="list-style-type: none"> <li>Assess partnerships to identify respective influence within each sector, potential expansion opportunities, and resource requirements</li> </ul> <p>Coordinating with Sector Advisors, Public Affairs, Commercial/Industrial Services, Community Relations, and Customer Assistance Program on effective workforce strategy.</p>
<p><b>Evaluation of Workforce Outcomes</b></p>	<ul style="list-style-type: none"> <li>Develop data tracking requirements for measuring workforce outcomes from WE&amp;T Centergies implementation</li> </ul> <p>SCG continues to modify its registration system to identify necessary category and class descriptions to augment reporting and tracking requirements.</p> <ul style="list-style-type: none"> <li>Develop statewide list of participant data to best track Sector Initiative progress</li> </ul> <p>SCG continues to modify its registration system to identify and augment reporting and tracking requirements to achieve statewide consistency.</p>
<p><b>Recommendation WE&amp;T Connections</b></p>	<p><b>IOU Proposed Activities to be completed as part of Q4 2011 deliverables</b></p>
<p><b>Collaborate with Education</b></p>	<ul style="list-style-type: none"> <li><b>Identify educational conferences to attend in 2012</b></li> </ul> <p>Connections staff has identified educational conferences for 2012.</p> <ul style="list-style-type: none"> <li><b>Identify potential schools with targeted populations (Title 1) and free and reduced meal prices through 2012</b></li> </ul> <p>Connections staff maintains a list of schools in the SCG service area that are Title 1 that will be used to market to in the first quarter of 2012 in partnership with SCE.</p> <ul style="list-style-type: none"> <li><b>Review list of current partners and potential collaboration opportunities that would be the most effective partners through 2012</b></li> </ul> <p>Connections staff maintains a list of all the partners/collaborations for each of the school programs managed by staff and intends to use these to identify the most effective partners through 2012.</p>
<p><b>Career Education</b></p>	<ul style="list-style-type: none"> <li><b>Support existing ongoing efforts to incorporate career education into K-8 curriculum programs</b> <ul style="list-style-type: none"> <li>Assembled internal committee.</li> <li>Continue to track collaborations/partners for all school programs.</li> <li>Completed and implemented PEAK Career Explorer guide.</li> <li>Identifying additional organizations/agencies that support K-8 career education.</li> <li>Identifying additional career education resources that can be shared with K-12 schools and Community Colleges.</li> </ul> </li> </ul>

**Evaluation of K-12 Programs**

- Develop data tracking requirements for measuring impact K-12 from WE&T Connections implementation  
*Assessment underway with support from Evaluation and Measurement Program.*
- Develop statewide list of participant data categories  
*Assessment underway with support from Evaluation and Measurement Program.*