

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



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Application of Southern California Gas
Company (U 904 G) for Approval of its
Energy Savings Assistance and California
Alternate Rates for Energy Programs and
Budgets for Program Years 2028-2033.

Application 26-01-XXX
(Filed January 16, 2026)

**APPLICATION OF SOUTHERN CALIFORNIA GAS COMPANY (U 904 G) FOR
APPROVAL OF ITS ENERGY SAVINGS ASSISTANCE AND CALIFORNIA
ALTERNATE RATES FOR ENERGY PROGRAMS AND BUDGETS
FOR PROGRAM YEARS 2028-2033**

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Date: January 16, 2026

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FOR PROGRAM YEARS 2028-2033**

I. INTRODUCTION

In accordance with Rule 15 of the California Public Utilities Commission's ("Commission") Rules of Practice and Procedure, Southern California Gas Company ("SoCalGas") hereby submits its Application for Approval of its Energy Savings Assistance ("ESA") and California Alternate Rates for Energy ("CARE") Programs and Budgets for Program Years ("PY") 2028-2033 ("Application").

In Decision ("D.") 21-06-015, the Commission established the goals, directives, budgets and program funding levels for the current CARE, Family Electric Rate Assistance ("FERA"), and ESA Program cycle for PYs 2021-2026. However, the Commission did not specifically address the timing or requirements for Pacific Gas and Electric Company ("PG&E"), Southern California Edison Company ("SCE"), San Diego Gas & Electric Company ("SDG&E"), and SoCalGas (collectively, the "IOUs") to file their respective low-income programs applications post-2026. To aid clarity, the Commission's Energy Division ("ED") issued informal guidance and provided an outline for suggested content for the next low-income programs application and

a pathway for bridge funding.¹ With ED input, the IOUs agreed each to file a (1) bridge funding application, and (2) full program cycle application. This approach is intended to (a) provide continuity in program funding and operations, (b) provide time to receive and incorporate stakeholder feedback into the Full Program Application, and (c) allow for sufficient time for the Commission to review and issue a timely decision on the full program application. The IOUs also consulted with ED to restructure the ED Staff Guidance to IOUs on CARE, CAS, ESA, and FERA (“Guidance Document”) and obtained input from ED staff regarding application filing dates. The Guidance Document provides the IOUs direction on the structure and other aspects of both the bridge funding and full program applications. Following this communication, the IOUs communicated the revised Guidance Document and the anticipated filing deadlines for the respective applications to the service list.² This filing consists of the Application and prepared direct testimony specific for PYs 2028-2033 in support of the Application. The prepared direct testimony described herein is served concurrently here with and incorporated in the Application by reference.

II. BASIS FOR THE APPLICATION

Consistent with D.21-06-015 that authorized budgets for CARE, FERA and ESA Programs for the 2021-2026 program cycle, SoCalGas submits this Application and provides testimony detailing its PYs 2028-2033 funding request for CARE and ESA Program budgets. SoCalGas’s proposal and funding request will allow for the continuity of the CARE and ESA Programs.

¹ On October 31, 2024, ED issued an informal guidance document to the IOUs in preparation for the next ESA/CARE/FERA application proceeding and program cycle.

² On February 21, 2025, PG&E on behalf of the IOUs notified all parties on the Application (“A.”) 19-11-003 service list, provided an update regarding the upcoming application process and timeline.

III. OVERVIEW OF REQUEST

SoCalGas understands the important role it plays in providing affordable energy for all customers and appreciates the opportunity to continue offering programs that will support energy savings in addition to providing health, comfort, and safety (“HCS”) measures and bill discounts. In this Application, SoCalGas’s proposals and budgets contemplate and support affordability, safety, reliability, and flexibility. SoCalGas believes that natural gas remains a key element in California’s transition to cleaner energy. As a result, for PYs 2028-2033 SoCalGas plans to continue its commitment to provide programs and services designed to meet the needs of its low-income, hard-to-reach and disadvantaged communities as well as those with limited English proficiency (“LEP”), who may benefit from SoCalGas’s Customer Assistance programs.³

IV. SUMMARY OF APPLICATION AND TESTIMONY

SoCalGas offers the following prepared testimony that presents ESA and CARE Program proposals for PYs 2028-2033, which conform to the requirements set forth in the Guidance document.

Testimony sponsored by Mr. Octavio Verduzco, Customer Assistance Program Manager, and Mr. Roy Christian, Customer Programs Regulatory Support Manager, addresses the plans and budgets for the ESA and CARE Programs. Mr. Verduzco’s and Mr. Christian’s testimony (pre-marked as Exhibit SCG-01) sponsors the operational, marketing and outreach elements of both SoCalGas’s ESA and CARE Program proposals and requests. Testimony sponsored by Mr. Andrew Steinberg provides the policy bases and recommendations for the CARE and ESA Programs.

³ SoCalGas interchangeably refers to its ESA and CARE Programs as its Customer Assistance Programs.

V. ESA PROGRAM

For the upcoming program cycle, SoCalGas plans to maintain the core structure of the ESA Program with only minor adjustments rather than introducing significant changes or new initiatives.

A. ESA Main Program

The existing framework of the program, which provides no-cost energy efficiency measures to income-qualified customers, will remain the same. Changes proposed are expected to be incremental, such as small updates to the budget request and administrative processes, rather than a full program redesign. SoCalGas has developed its proposed budgets with a comprehensive understanding of both current program funding levels and the evolving needs of all eligible customers and the contractor network fulfilling the program's services. In addition, the four IOUs are jointly requesting a modernization of the existing reporting framework. This updated reporting mechanism is intended to provide a clearer, more holistic view of program performance across multiple dimensions.

B. ESA Multi-Family Whole Building ("MFWB") Program

The MFWB program, which targets energy efficiency improvements for multi-family homes, is currently administered at a regional level. SoCalGas is requesting that this program be returned to local administration, meaning SoCalGas would manage it directly within its service territory rather than through a centralized regional entity. This could allow for more tailored implementation and potentially better alignment with local customer needs.

C. ESA Pilot Plus/Deep

SoCalGas is not planning to test or launch any experimental programs or pilot projects during this cycle. Pilots are typically used to explore innovative approaches or technologies

before broader implementation, and their absence means SoCalGas is focusing on stability, continuity, and affordability.

D. Low Income Needs Assessment

SoCalGas requests authority to initiate the 2028 Low Income Needs Assessment (“LINA”) study in 2027.

E. ESA Cost Effectiveness Test (“ESACET”)

Please refer to the table below for the ESACET Portfolio values applicable to the period 2028 through 2033. The ESACET values were calculated by SoCalGas utilizing PY 2024 portfolio composition in conjunction with updated budget information, as well as the annual forecasted program cycle goals for therms and the forecasted annual household treatment.

Portfolio	ESACET	Resource Test	TRC	PAC	RIM	SCT Base	SCT High
2028	0.85	0.67	0.32	0.32	0.24	0.47	0.47
2029	0.86	0.68	0.32	0.32	0.25	0.48	0.48
2030	0.87	0.70	0.33	0.33	0.26	0.49	0.49
2031	0.88	0.71	0.34	0.34	0.26	0.50	0.50
2032	0.89	0.73	0.35	0.35	0.27	0.51	0.51
2033	0.90	0.75	0.35	0.35	0.28	0.52	0.52

VI. CARE PROGRAM

SoCalGas does not propose any major changes to the CARE eligibility guidelines and requirements for PY 2028-2033. The following is a list of recommendations from SoCalGas for the CARE Program:

- SoCalGas seeks approval for flexibility in the outdated PEV rate cap to address CARE over-enrollment trends.
- SoCalGas recommends revisiting the current program framework, which allows CARE customers to qualify based on income or categorical eligibility (“CE”) through participation in eligible public assistance programs. SoCalGas proposes to maintain and refine the current CE list to prioritize programs aligned with income thresholds and verification rigor.
 - The following alignment rules should be applied:
 - SSI: Restrict to 1–2 person households; rename on CARE form.

- Medi-Cal: Retain only for adults (18+); rename on CARE form.
- CalWorks/TANF: Add footnote for income-based qualification only.
- Retain CalFresh, WIC, LIHEAP; conditional retention for HeadStart, SSI, CalWorks/TANF.
- CE enrollments have increased from 55% to 65% of CARE participants in the past decade; Any CARE categorical eligibility guideline changes may affect approximately 38% of total CARE customers.

SoCalGas intends to continue implementing best practices aligned with its current program goals, budget, service delivery methods, and strategies that have proven successful during the current cycle (PY 2021–2026).

Furthermore, SoCalGas currently administers CARE through structured enrollment, recertification, and verification processes, supported by customer notifications via mail, email, phone, and limited short message service (“SMS”) reminders. Program integrity is maintained through compliance measures and collaborative efforts among IOUs. For the 2028–2033 cycle, SoCalGas proposes enhancements aimed at improving customer experience, increasing engagement, and streamlining operations. Key changes include:

- **Expanded CARE Customer Communication:** Additional reminders for enrollment, recertification, and verification including opt-out options for customers no longer eligible.
- **Technology Upgrades:** Enhanced transactional messaging, Interactive Voice Assistant for CARE enrollment, and improved Telecommunications and Web/My Account features.
- **Barrier Reduction:** Simplified applications and processes to address language and accessibility challenges, informed by stakeholder recommendations.
- **Program Structure:** Maintain a six-year term, cap administrative costs at 10% of the authorized budget, and sunset outdated compliance requirements.
- **Stakeholder Collaboration:** Continued coordination with IOUs and CPUC-regulated utilities to promote consistency and best practices.

These proposed changes aim to modernize CARE operations, improve customer satisfaction, and uphold program integrity while meeting regulatory objectives.

For PY 2028-2033, SoCalGas escalated its labor based on its TY 2024 GRC approved inflation rate of 3% to account for any inflation-related adjustments. Additionally, SoCalGas requests authorization to adjust the CARE budget to reflect IT modernization enhancements as well as increased subsidies due to current enrollment trends, which exceed previous authorized levels under D. 21-06-015 for PYs 2021–2026. This increase is driven by oversubscription in CARE participation, with 1,756,132 participants at year-end 2024 and a penetration rate of approximately 110%.

SoCalGas proposes a total CARE budget of \$1.20 billion for PY 2028–2033, allocated as follows: \$1.12 billion for CARE subsidies and the other \$81.8 million for CARE administrative costs.

A. Community Help and Awareness with Natural Gas and Electricity Services (“CHANGES”)

D.15-12-047 approved the Community Help and Awareness of Natural Gas and Electricity Services (“CHANGES”) program which provides outreach, education, and bill assistance on natural gas and electricity bills and services to LEP consumers through a statewide network of Community-Based Organizations (“CBOs”). CHANGES is a CPUC program designed to assist LEP customers with their energy-related needs. The CHANGES program is administered by a third-party implementer selected by and contracted with the CPUC. The CHANGES third party implementer manages the same network of CBOs who also provide direct services for the Telecommunications Education and Assistance in Multiple Languages (“TEAM”) program which provides services in similar nature to CHANGES but focuses on supporting the same LEP customers with telecommunications services. CHANGES uses the

same CBOs in TEAM, and this allows consumers a “one-stop shop” for education and assistance on telecommunications and energy services.

Although CHANGES funding is currently allocated within the general administrative budget of the CARE program, it does not support any administrative activities at SoCalGas. It is instead used to directly fund agencies that assist LEP customers. However, this creates ambiguity and makes it challenging to accurately track program-related expenses. SoCalGas therefore recommends moving this allocation out of the general administrative category and into a separate, clearly defined line item within the CARE budget.

SoCalGas proposes to maintain the authorized funding for the CHANGES program. For PY 2027, SoCalGas will continue to utilize the existing funding mechanism at the funding levels approved for PY 2021-2026 through the CARE program to support the CHANGES program in PYs 2028-2033.

VII. REVENUE REQUIREMENTS AND RATE IMPACT

SoCalGas does not propose any changes to the revenue allocation or rate design for the CARE or ESA Program.

SoCalGas’s CARE program costs are currently recovered using an Equal Cent Per Therm (“ECPT”) approach to allocate costs between the customer classes. The CARE Program rates are calculated by multiplying the program cost by the allocation factor and dividing by the applicable billing determinants minus any exempt throughput. SoCalGas recovers its CARE Program costs through the Public Purpose Program (“PPP”) surcharge. The CARE Program cost is calculated from the revenue requirement, which is based on the combination of both the administration costs and the CARE subsidy and any pending balancing accounts.

SoCalGas's ESA Program costs are currently recovered from the residential customer class. The ESA Program rates are calculated by multiplying the program cost by the allocation factor and dividing by the applicable billing determinants minus any exempt throughput. SoCalGas recovers its ESA Program costs through the PPP surcharge. The ESA Program cost is calculated from the revenue requirement, which is based on the combination of both the energy efficiency ("EE") category costs as well as the administrative and other cost categories.

SoCalGas requests that the Commission authorize recovery of the program plans and budgets proposed in this Application by means of the proposed CARE and ESA Program cost for PYs 2028-2033.

A. CARE Balancing Account

SoCalGas maintains a two-way CARE balancing account ("CAREA") to track the CARE program expenses incurred against gas surcharge funds reimbursed from the State Board of Equalization ("BOE"). SoCalGas maintains the CAREA by recording entries for CARE administrative costs, CARE discounts, and gas surcharges billed at the end of each month. SoCalGas also records to the CAREA remittances of PPP funds collected from ratepayers to the BOE and subsequently records the reimbursement of those funds one to two months after the funds were remitted. SoCalGas does not propose any changes to the CAREA.

B. Direct Assistance Program Balancing Account

SoCalGas maintains a one-way Direct Assistance Program Balancing Account ("DAPBA") to record the difference between actual ESA Program expenses and ESA Program-related gas surcharge revenues billed to customers which are remitted to/reimbursed from the State BOE. Any over collected balances in the DAPBA at the end of the program cycle will be refunded to ratepayers in connection with the PPP surcharge rate update advice letter filing. Any overspending above authorized levels (*e.g.* an under collected balance) at the end of the program

cycle are not recoverable from ratepayers. SoCalGas does not propose any changes to the DAPBA.

SoCalGas requests that the Commission authorize recovery of the program plans and budgets proposed in this Application by means of the proposed CARE and ESA Program cost for PYs 2028-2033.

VIII. STATUTORY AND PROCEDURAL REQUIREMENTS

A. Rule 2.1 (a) – (c)

This Application is made pursuant to Section 451, 701, 702, 728, and 729 of the Public Utilities Code of the State of California; the Commission's Rules of Practice and Procedure; and the other relevant prior decisions, orders, and resolutions of the Commission.

1. Rule 2.1 (a) – Legal Name

Southern California Gas Company is a public utility corporation organized and existing under the laws of the State of California. SoCalGas's principal place of business and mailing address is 555 West Fifth Street, Los Angeles, California 90013.

2. Rule 2.1 (b) – Correspondence

All correspondence and communications to SoCalGas regarding this Application should be addressed to:

Kristine Huliganga
Regulatory Case Manager for:
SOUTHERN CALIFORNIA GAS COMPANY
555 West 5th Street, GT14D6
Los Angeles, California 90013
Telephone: (213) 231-6987
E-Mail: khuliganga@socalgas.com

A copy should also be sent to:

Ismael Bautista, Jr.

Attorney for:

SOUTHERN CALIFORNIA GAS COMPANY

555 West 5th Street, GT14E7

Los Angeles, California 90013

Telephone: (213) 231-5978

Facsimile: (213) 629-9620

E-mail: ibautista@socalgas.com

3. Rule 2.1 (c) – Proposed Category, Need for Hearings, Issues to be Considered, and Schedule

a. Proposed Category of Proceeding

SoCalGas proposes to categorize this Application as a “rate setting” proceeding within the meaning of Rules 1.3(g) and 7.1 and because the Application will have a potential future effect on rates.

b. Need for Hearings

Because the issues to be addressed in this proceeding are legal- and policy-oriented, SoCalGas does not anticipate a need for hearings.

c. Issues to be Considered and Relevant Safety Considerations

The principal issue to be considered in this proceeding is whether the Commission should approve the ESA and CARE Programs proposed in this Application, and whether the Commission should therefore grant the relief requested as summarized in Section VIII below. With respect to safety, SoCalGas is requesting funding for HCS measures embedded in various program goals. Approval of these measures would enhance customers’ safety.

d. Proposed Schedule

SoCalGas proposes the following schedule for this Application:

Event	Date
SoCalGas files Application	January 16, 2026
Responses/Protests to Application	within 30 days Daily Calendar Notice
SoCalGas Reply to Responses/Protests	within 10 days, per Rule 2.6
Prehearing Conference	March 31, 2026
Intervenor Testimony	August 5, 2026
Rebuttal Testimony	September 11, 2026
Evidentiary Hearings (<i>if needed</i>)	October 5-9, 2026
Opening Briefs	Mid-November 2026
Reply Briefs	Mid-December 2026
Proposed Decision	May 2027
Commission Decision	June 2027

4. Rule 2.2 – Articles of Incorporation

A copy of SoCalGas’s Restated Articles of Incorporation, as last amended, presently in effect and certified by the California Secretary of State, was previously filed with the Commission on October 1, 1998, in connection with SoCalGas’s Application No. 98-10-012, and is incorporated herein by reference.

5. Rule 3.2 (a) – (d)

In accordance with Rule 3.2 (a)-(d) of the Commission’s Rules of Practice and Procedure, SoCalGas provides the following information:

a. Rule 3.2 (a)(1) – Balance Sheet and Income Statement

The most recent updated Financial Statement, Balance Sheet and Income Statement for SoCalGas as of December 31, 2024, is attached to this Application as Attachment A.

b. Rule 3.2(a)(2) and (3) – Statement of Present and Proposed Rates

The illustrative rate changes that will result from this Application are described in Attachment F, Table B-2.

c. Rule 3.2(a)(4) – Description of Applicant’s Property and Equipment

A general description of SoCalGas’s property and equipment was previously filed with the Commission on May 3, 2004, in connection with SoCalGas’s Application 04-05-008, and is incorporated herein by reference. A statement of Original Cost and Depreciation Reserve as of December 31, 2024, is attached as Attachment B.

d. 3.2(a)(5) and (6) – Summary of Earnings

A summary of earnings for SoCalGas as of December 31, 2024, is included herein as Attachment C.

e. Rule 3.2(a)(7) – Depreciation

For financial statement purposes, depreciation of utility plant has been computed on a straight-line remaining life basis at rates based on the estimated useful lives of plant properties. For federal income tax accrual purposes, SoCalGas generally computes depreciation using the straight-line method for tax property additions prior to 1954, and liberalized depreciation, which includes Class Life and Asset Depreciation Range Systems, on tax property additions after 1954 and prior to 1981. For financial reporting and rate-fixing purposes, “flow through accounting” has been adopted for such properties. For tax property additions in the years 1981 through 1986, SoCalGas has computed its tax depreciation using the Accelerated Cost Recovery System. For years after 1986, SoCalGas computed its tax depreciation using the Modified Accelerated Cost Recovery Systems and, since 1982, has normalized the effects of the depreciation differences in accordance with the Economic Recovery Tax Act of 1981, the Tax Reform Act of 1986, and the Tax Cuts and Job Act of 2017.

f. Rule 3.2(a)(8) – Proxy Statement

A copy of SoCalGas's most recent proxy statement, dated April 26, 2025, was mailed to the Commission on April 28, 2025, and is incorporated herein by reference.

g. Rule 3.2(a)(10) – Statement Pass Through to Customers

SoCalGas seeks in this Application reflect estimated costs to SoCalGas and passes through to customers only costs that SoCalGas incurs for the services and commodities that it furnishes.

h. Rule 3.2(b) – Notice to State, Cities and Counties

SoCalGas will, within twenty days after the filing this Application, mail a notice to the State of California and to the cities and counties in its service territory.

i. Rule 3.2 (c) – Newspaper Publication

SoCalGas will, within twenty days after the filing of this Application, publish in newspapers of general circulation in each county in their service territory notice of this Application.

j. Rule 3.2 (d) – Bill Insert Notice

SoCalGas will, within 45 days after the filing of this Application, provide notice of this Application to their customers along with the regular bills sent to those customers that will generally describe the proposed rate changes addressed in this Application.

6. Rule 1.9 - Service

This is a new application. No service list has been established. Accordingly, SoCalGas will electronically serve this application on parties to the service list for the following proceedings: Low Income Programs PYs 2021-2026 (A.19-11-003, et al.), Bridge Funding Application (A.25-06-022, et al.), and R.25-04-010.

IX. CONCLUSION

For the reasons set forth in this Application and accompanying testimony, SoCalGas respectfully asks the Commission to:


- 1) Approve SoCalGas's low-income assistance program plans, goals, measures, and budgets for PYs 2028-2033;
- 2) Approve the proposed budget for the ESA Program of \$124,172,251 for PY 2028, \$127,733,769 for PY 2029, \$131,548,296 for PY 2030, \$135,363,828 for PY 2031, \$139,274,896 for PY 2032 and \$143,273,452 for PY 2033 according to the costs presented by category in Ex. SCG-01;⁴
- 3) Approve the proposed budget for the CARE Program of \$220,375,811 for PY 2028, \$213,279,988 for PY 2029, \$204,929,233 for PY 2030, \$195,857,954 for PY 2031, \$188,231,418 for PY 2032 and \$181,347,651 for PY 2033 according to the costs presented by category in Ex. SCG-01;⁵
- 4) Continue the participation goal as presented in this Application for the CARE Program provide additional flexibility for post-enrollment verification rates, and continue the flexibility provided for changes to the probability model;
- 5) Adopt new treatment goals as presented in this Application for the ESA Program, to replace all prior treatment goals for the past ESA Program;
- 6) Modify ESA Program rules for the 2028-2033 cycle, including permitting fund shifting between years, and if ESA multifamily is returned to a local model, allowing fund shifting across program segments;
- 7) Approve local administration of the ESA multifamily segment program;

⁴ Ex. SCG-01, Attachment E, Table 7.

⁵ Ex. SCG-01, Attachment E, Table B-1.

- 8) Approve moving NGAT expenditures from being addressed in GRCs to the instant proceeding and incorporated into rates through the PPP Surcharge, with proposed funding levels of \$3,092,352 per year for PYs 2028 – 2033, totaling \$18,554,111 according to the costs presented in Ex. SCG-01.⁶ Upon approval for PY 2028, SoCalGas would no longer seek cost recovery through its GRCs; and
- 9) Grant such other and further relief which the Commission finds to be just and reasonable.

Respectfully submitted this 16th day of January 2026,

By: 

ANDY CARRASCO
Vice President – Communications and Regional
Stakeholder Engagement
SOUTHERN CALIFORNIA GAS COMPANY

By: /s/ Ismael Bautista, Jr.
ISMAEL BAUTISTA, JR.

Attorney for:
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555 West 5th Street, Suite 1400
Los Angeles, California 90013
Telephone: (213) 231-5978
Facsimile: (213) 629-9620
E-Mail: ibautista@socalgas.com

Date: January 16, 2026

⁶ Amounts shown are embedded within the total costs requested for the ESA Program described in Item (1) above.

VERIFICATION

I am an officer of Southern California Gas Company and am authorized to make this verification on its behalf. I am informed and believe that the matters stated in the foregoing Application are true to my own knowledge, except as to matters which are therein stated on information and belief, and as to those matters, I believe them to be true.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Executed this 16th day of January 2026 at Los Angeles, California.

Respectfully submitted,

By:



ANDY CARRASCO

Vice President – Communications and Regional
Stakeholder Engagement

SOUTHERN CALIFORNIA GAS COMPANY


ALISO CANYON ATTESTATION

1. I am Vice President of Communications and Regional Stakeholder Engagement for Southern California Gas Company (SoCalGas). I am providing this attestation based upon the requirements of Ordering Paragraph 5 of California Public Utilities Commission (CPUC or Commission) Decision (D.) 23-09-022.
2. On December 23, 2015 the CPUC-Executive Director issued a letter to SoCalGas directing SoCalGas to provide information to the CPUC concerning costs associated with the uncontrolled release of natural gas from Well SS-25 at the Aliso Canyon Storage Field from October 23, 2015 through February 11, 2016 (the Incident).
3. Beginning in December 2015, SoCalGas has reported to the Commission the costs associated with the Incident in the monthly Incident-related cost report submitted pursuant to the Executive Director's December 23, 2015 (Directive Report).
4. On October 28, 2022, SoCalGas, the California Public Utilities Commission's Safety and Enforcement Division ("SED") and the Public Advocates Office at the California Public Utilities Commission ("Cal Advocates") filed a Joint Motion for Adoption of Settlement Agreement in Investigation (I.) 19-06-016 seeking approval of the Settlement Agreement entered into by SoCalGas, SED, and Cal Advocates (Settlement Agreement).
5. On September 12, 2023, the Commission issued Decision (D.) 23-09-002 which approved the Settlement Agreement between SoCalGas, SED, and Cal Advocates resolving I.19-06-016.
6. Ordering Paragraph 5 of D.23-09-002 states that SoCalGas shall submit an attestation by a Vice President or higher company executive with every application requesting rate recovery attesting that it has not included any expenses or costs identified in the

Settlement Agreement. This attestation requirement shall apply for five years from the date of the final issuance of this decision.

7. I reviewed the costs requested in this Application and the most recent Directive Report. Based on my review of the costs, the Directive Report, and other diligence, I am informed and believe, and upon such information and belief, certify that SoCalGas has not included any expenses or costs identified in the Settlement Agreement adopted in D.23-09-002 in the enclosed Application being filed on January 16, 2026.

Executed on January 16, 2026, at Los Angeles, California.

By: 

ANDY CARRASCO
Vice President – Communications and Regional
Stakeholder Engagement
SOUTHERN CALIFORNIA GAS COMPANY

ATTACHMENT A

**Balance Sheets and Statement of
Earnings**

**SOUTHERN CALIFORNIA GAS COMPANY
BALANCE SHEET
ASSETS AND OTHER DEBITS
SEPTEMBER 30, 2025**

1. UTILITY PLANT		2025
101	UTILITY PLANT IN SERVICE	\$28,577,686,090
102	UTILITY PLANT PURCHASED OR SOLD	-
105	PLANT HELD FOR FUTURE USE	-
106	COMPLETED CONSTRUCTION NOT CLASSIFIED	-
107	CONSTRUCTION WORK IN PROGRESS	2,039,287,301
108	ACCUMULATED PROVISION FOR DEPRECIATION OF UTILITY PLANT	(8,886,165,206)
111	ACCUMULATED PROVISION FOR AMORTIZATION OF UTILITY PLANT	(279,161,205)
117	GAS STORED-UNDERGROUND	61,422,045
TOTAL NET UTILITY PLANT		<u>21,513,069,025</u>
 2. OTHER PROPERTY AND INVESTMENTS		
121	NONUTILITY PROPERTY	36,717,077
122	ACCUMULATED PROVISION FOR DEPRECIATION AND AMORTIZATION OF NONUTILITY PROPERTY	(15,018,867)
123	INVESTMENTS IN SUBSIDIARY COMPANIES	-
	NONCURRENT PORTION OF ALLOWANCES	-
124	OTHER INVESTMENTS	1
125	SINKING FUNDS	-
128	OTHER SPECIAL FUNDS	12,154,736
TOTAL OTHER PROPERTY AND INVESTMENTS		<u>33,852,947</u>

SOUTHERN CALIFORNIA GAS COMPANY
BALANCE SHEET
ASSETS AND OTHER DEBITS
SEPTEMBER 30, 2025

3. CURRENT AND ACCRUED ASSETS		2025
131	CASH	292,597
132	INTEREST SPECIAL DEPOSITS	-
134	OTHER SPECIAL DEPOSITS	-
135	WORKING FUNDS	120,773
136	TEMPORARY CASH INVESTMENTS	-
141	NOTES RECEIVABLE	-
142	CUSTOMER ACCOUNTS RECEIVABLE	820,355,248
143	OTHER ACCOUNTS RECEIVABLE	41,641,581
144	ACCUMULATED PROVISION FOR UNCOLLECTIBLE ACCOUNTS	(215,531,903)
145	NOTES RECEIVABLE FROM ASSOCIATED COMPANIES	34
146	ACCOUNTS RECEIVABLE FROM ASSOCIATED COMPANIES	(16,284,032)
151	FUEL STOCK	-
152	FUEL STOCK EXPENSE UNDISTRIBUTED	-
154	PLANT MATERIALS AND OPERATING SUPPLIES	141,984,223
155	MERCHANDISE	-
156	OTHER MATERIALS AND SUPPLIES	-
158	GHG ALLOWANCE	1,127,729,463
	(LESS) NONCURRENT PORTION OF ALLOWANCES	-
163	STORES EXPENSE UNDISTRIBUTED	(1,843,512)
164	GAS STORED	159,629,134
165	PREPAYMENTS	100,149,442
171	INTEREST AND DIVIDENDS RECEIVABLE	813,453
173	ACCRUED UTILITY REVENUES	-
174	MISCELLANEOUS CURRENT AND ACCRUED ASSETS	9,350,800
175	DERIVATIVE INSTRUMENT ASSETS	11,645,519
	TOTAL CURRENT AND ACCRUED ASSETS	2,180,052,820
4. DEFERRED DEBITS		
181	UNAMORTIZED DEBT EXPENSE	54,508,655
182	UNRECOVERED PLANT AND OTHER REGULATORY ASSETS	5,520,557,868
183	PRELIMINARY SURVEY & INVESTIGATION CHARGES	6,957,408
184	CLEARING ACCOUNTS	3,679,119
185	TEMPORARY FACILITIES	-
186	MISCELLANEOUS DEFERRED DEBITS	528,871,082
188	RESEARCH AND DEVELOPMENT	-
189	UNAMORTIZED LOSS ON REACQUIRED DEBT	-
190	ACCUMULATED DEFERRED INCOME TAXES	1,186,448,649
191	UNRECOVERED PURCHASED GAS COSTS	-
	TOTAL DEFERRED DEBITS	7,301,022,781
	TOTAL ASSETS AND OTHER DEBITS	\$ 31,027,997,573

SOUTHERN CALIFORNIA GAS COMPANY
BALANCE SHEET
LIABILITIES AND OTHER CREDITS
SEPTEMBER 30, 2025

5. PROPRIETARY CAPITAL

	<u>2025</u>
201 COMMON STOCK ISSUED	(834,888,907)
204 PREFERRED STOCK ISSUED	(21,551,075)
207 PREMIUM ON CAPITAL STOCK	-
208 OTHER PAID-IN CAPITAL	-
210 GAIN ON RETIRED CAPITAL STOCK	(9,722)
211 MISCELLANEOUS PAID-IN CAPITAL	(1,481,306,680)
214 CAPITAL STOCK EXPENSE	143,261
216 UNAPPROPRIATED RETAINED EARNINGS	(6,421,622,726)
219 ACCUMULATED OTHER COMPREHENSIVE INCOME	<u>18,080,829</u>
TOTAL PROPRIETARY CAPITAL	<u>(8,741,155,020)</u>

6. LONG-TERM DEBT

221 BONDS	(7,400,000,000)
224 OTHER LONG-TERM DEBT	(709,338,770)
225 UNAMORTIZED PREMIUM ON LONG-TERM DEBT	6,670,147
226 UNAMORTIZED DISCOUNT ON LONG-TERM DEBT	<u>19,014,193</u>
TOTAL LONG-TERM DEBT	<u>(8,083,654,430)</u>

7. OTHER NONCURRENT LIABILITIES

227 OBLIGATIONS UNDER CAPITAL LEASES - NONCURRENT	(98,666,121)
228.2 ACCUMULATED PROVISION FOR INJURIES AND DAMAGES	(92,472,716)
228.3 ACCUMULATED PROVISION FOR PENSIONS AND BENEFITS	(33,490,906)
228.4 ACCUMULATED MISCELLANEOUS OPERATING PROVISIONS	-
245 NONCURRENT DERIVATIVE INSTRUMENT LIABILITIES	-
230 ASSET RETIREMENT OBLIGATIONS	<u>(3,068,017,884)</u>
TOTAL OTHER NONCURRENT LIABILITIES	<u>(3,292,647,627)</u>

**SOUTHERN CALIFORNIA GAS COMPANY
BALANCE SHEET
LIABILITIES AND OTHER CREDITS
SEPTEMBER 30, 2025**

8. CURRENT AND ACCRUED LIABILITIES

	<u>2025</u>
231 NOTES PAYABLE	(410,808,974)
232 ACCOUNTS PAYABLE	(597,794,263)
233 NOTES PAYABLE TO ASSOCIATED COMPANIES	-
234 ACCOUNTS PAYABLE TO ASSOCIATED COMPANIES	(43,229,558)
235 CUSTOMER DEPOSITS	(74,180,144)
236 TAXES ACCRUED	(54,851,212)
237 INTEREST ACCRUED	(116,122,059)
238 DIVIDENDS DECLARED	(323,266)
241 TAX COLLECTIONS PAYABLE	(22,539,546)
242 MISCELLANEOUS CURRENT AND ACCRUED LIABILITIES	(554,040,836)
243 OBLIGATIONS UNDER CAPITAL LEASES - CURRENT	(32,644,017)
244 DERIVATIVE INSTRUMENT LIABILITIES	(77,777,015)
245 DERIVATIVE INSTRUMENT LIABILITIES - HEDGES	
	<u>(1,984,310,890)</u>
TOTAL CURRENT AND ACCRUED LIABILITIES	

9. DEFERRED CREDITS

252 CUSTOMER ADVANCES FOR CONSTRUCTION	(113,521,691)
253 OTHER DEFERRED CREDITS	(1,130,527,827)
254 OTHER REGULATORY LIABILITIES	(4,296,055,954)
255 ACCUMULATED DEFERRED INVESTMENT TAX CREDITS	(5,414,489)
257 UNAMORTIZED GAIN ON REACQUIRED DEBT	-
281 ACCUMULATED DEFERRED INCOME TAXES - ACCELERATED	-
282 ACCUMULATED DEFERRED INCOME TAXES - PROPERTY	(2,587,424,116)
283 ACCUMULATED DEFERRED INCOME TAXES - OTHER	(793,285,529)
	<u>(8,926,229,606)</u>
TOTAL DEFERRED CREDITS	

TOTAL LIABILITIES AND OTHER CREDITS	<u><u>\$ (31,027,997,573)</u></u>
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SOUTHERN CALIFORNIA GAS COMPANY
STATEMENT OF INCOME AND RETAINED EARNINGS
NINE MONTHS ENDED SEPTEMBER 30, 2025

1. UTILITY OPERATING INCOME

400	OPERATING REVENUES		4,463,528,367
401	OPERATING EXPENSES	2,458,047,475	
402	MAINTENANCE EXPENSES	340,722,581	
403-7	DEPRECIATION AND AMORTIZATION EXPENSES	758,498,590	
408.1	TAXES OTHER THAN INCOME TAXES	175,293,738	
409.1	INCOME TAXES	37,663,295	
410.1	PROVISION FOR DEFERRED INCOME TAXES	527,394,626	
411.1	PROVISION FOR DEFERRED INCOME TAXES - CREDIT	(594,924,394)	
411.4	INVESTMENT TAX CREDIT ADJUSTMENTS	(234,268)	
411.6	GAIN FROM DISPOSITION OF UTILITY PLANT	-	
411.7	LOSS FROM DISPOSITION OF UTILITY PLANT	-	
	TOTAL OPERATING REVENUE DEDUCTIONS		<u>3,702,461,643</u>
	NET OPERATING INCOME		<u>761,066,724</u>

2. OTHER INCOME AND DEDUCTIONS

415	REVENUE FROM MERCHANDISING, JOBBING AND CONTRACT WORK	-	
417	REVENUES FROM NONUTILITY OPERATIONS	-	
417.1	EXPENSES OF NONUTILITY OPERATIONS	(6,209,548)	
418	NONOPERATING RENTAL INCOME	127,569	
418.1	EQUITY IN EARNINGS OF SUBSIDIARIES	-	
419	INTEREST AND DIVIDEND INCOME	31,168,944	
419.1	ALLOWANCE FOR OTHER FUNDS USED DURING CONSTRUCTION	52,985,964	
421	MISCELLANEOUS NONOPERATING INCOME	(1,744,074)	
421.1	GAIN ON DISPOSITION OF PROPERTY	-	
	TOTAL OTHER INCOME	<u>76,328,855</u>	
421.2	LOSS ON DISPOSITION OF PROPERTY	488,209	
425	MISCELLANEOUS AMORTIZATION	-	
426	MISCELLANEOUS OTHER INCOME DEDUCTIONS	(12,922,556)	
	TOTAL OTHER DEDUCTIONS	<u>(12,434,347)</u>	
408.2	TAXES OTHER THAN INCOME TAXES	(275,215)	
409.2	INCOME TAXES	6,204,258	
410.2	PROVISION FOR DEFERRED INCOME TAXES	(102,587,224)	
411.2	PROVISION FOR DEFERRED INCOME TAXES - CREDIT	116,945,063	
420	INVESTMENT TAX CREDITS	-	
	TOTAL TAXES ON OTHER INCOME AND DEDUCTIONS	<u>20,286,882</u>	
	TOTAL OTHER INCOME, DEDUCTIONS AND TAXES		<u>84,181,390</u>
	INCOME BEFORE INTEREST CHARGES		845,248,114
	NET INTEREST CHARGES*		<u>271,798,061</u>
	NET INCOME		<u><u>\$573,450,053</u></u>

*NET OF ALLOWANCE FOR BORROWED FUNDS USED DURING CONSTRUCTION. \$ (21,917,948.26)

STATEMENT OF INCOME AND RETAINED EARNINGS
NINE MONTHS ENDED SEPTEMBER 30, 2025

3. RETAINED EARNINGS

RETAINED EARNINGS AT BEGINNING OF PERIOD, AS PREVIOUSLY REPORTED	5,849,142,471
NET INCOME (FROM PRECEDING PAGE)	\$573,450,053
DIVIDEND TO PARENT COMPANY	-
DIVIDENDS DECLARED - PREFERRED STOCK	(969,798)
DIVIDENDS DECLARED - COMMON STOCK	-
OTHER RETAINED EARNINGS ADJUSTMENT	-
RETAINED EARNINGS AT END OF PERIOD	<u>6,421,622,726</u>

ATTACHMENT B

Original Cost and Depreciation

SoCalGas
Plant Investment and Accumulated Depreciation
As of September 30, 2025

ACCOUNT NUMBER	DESCRIPTION	ORIGINAL COSTS	ACCUMULATED RESERVE	NET BOOK VALUE
INTANGIBLE ASSETS				
301	Organization	76,457	-	76,457
302	Franchise and Consents	602,060	-	602,060
303	Cloud Compute	256,834,092	(51,031,863)	205,802,229
	Total Intangible Assets	257,512,609	(51,031,863)	206,480,746
PRODUCTION:				
325	Other Land Rights	-	-	-
330	Prd Gas Wells Const	-	-	-
331	Prd Gas Wells Eqp	-	-	-
332	Field Lines	-	-	-
334	FldMeas&RegStnEquip	-	-	-
336	Prf Eqpt	-	-	-
	Total Production	-	-	-
UNDERGROUND STORAGE:				
350	Land	4,435,130	-	4,435,130
350SR	Storage Rights	19,069,515	(17,741,191)	1,328,324
350RW	Rights-of-Way	25,354	(20,468)	4,886
351	Structures and Improvements	204,329,045	(42,385,774)	161,943,272
352	Wells	805,146,879	242,908,997	1,048,055,876
353	Lines	268,995,089	(33,685,070)	235,310,019
354	Compressor Station and Equipment	519,580,039	(109,626,009)	409,954,030
355	Measuring And Regulator Equipment	33,707,823	(6,604,111)	27,103,712
356	Purification Equipment	184,450,159	(104,081,409)	80,368,750
357	Other Equipment	170,285,288	(41,043,622)	129,241,666
	Total Underground Storage	2,210,024,322	(112,278,657)	2,097,745,665
TRANSMISSION PLANT- OTHER:				
365	Land	9,542,816	-	9,542,816
365RW	Rights-of-Way	129,872,118	(32,703,119)	97,168,999
366	Structures and Improvements	343,283,533	(41,590,524)	301,693,008
367	Mains	4,042,652,696	(1,006,571,348)	3,036,081,348
368	Compressor Station and Equipment	731,417,774	(141,417,525)	590,000,249
369	Measuring And Regulator Equipment	508,746,243	(84,919,203)	423,827,040
370	Communication Equipment	153,534,172	(43,298,263)	110,235,909
371	Other Equipment	53,605,654	(9,512,843)	44,092,811
	Total Transmission Plant	5,972,655,004	(1,360,012,824)	4,612,642,180
DISTRIBUTION PLANT:				
374	Land	29,737,007	-	29,737,007
374LRIS	Land Rights	3,797,578	(2,477,293)	1,320,285
375	Structures and Improvements	491,837,199	(104,143,478)	387,693,721
376	Mains	7,460,224,745	(3,407,832,576)	4,052,392,169
378	Measuring And Regulator Equipment	263,669,629	(113,839,770)	149,829,859
380	Services	4,498,502,009	(2,524,191,716)	1,974,310,293
381	Meters	1,090,437,506	(456,759,334)	633,678,172

SoCalGas
Plant Investment and Accumulated Depreciation
As of September 30, 2025

ACCOUNT NUMBER	DESCRIPTION	ORIGINAL COSTS	ACCUMULATED RESERVE	NET BOOK VALUE
382	Meter Installation	747,722,340	(316,121,636)	431,600,705
383	House Regulators	213,263,654	(103,011,689)	110,251,965
387	Other Equipment	85,764,222	(39,565,277)	46,198,945
	Total Distribution Plant	14,884,955,890	(7,067,942,769)	7,817,013,121
GENERAL PLANT:				
389	Land	1,342,839	-	1,342,839
389LRTS	Land Rights	74,300	(50,876)	23,424
390	Structures and Improvements	273,498,451	(199,059,653)	74,438,799
391	Office Furniture and Equipment	2,524,033,766	(1,848,558,862)	675,474,903
392	Transportation Equipment	2,368,162	(579,458)	1,788,704
393	Stores Equipment	291,979	(109,059)	182,920
394	Shop and Garage Equipment	179,344,605	(45,952,948)	133,391,657
395	Laboratory Equipment	10,742,234	(1,830,099)	8,912,135
396	Construction Equipment	-	-	-
397	Communication Equipments	343,046,734	(149,059,077)	193,987,657
398	Miscellaneous Equipment	1,824,295	(128,242)	1,696,053
	Total General Plant	3,336,567,366	(2,245,328,275)	1,091,239,091
	Subtotal	26,661,715,191	(10,836,594,388)	15,825,120,802
121	Non-Utility Plant	32,431,524	(14,600,342)	17,831,182
117GSUNC	Gas Stored Underground - NonCurrent	61,422,045	-	61,422,045
GCL	GCT - Capital Lease	-	-	-
	Total Other - Non-Utility Plant	93,853,569	(14,600,342)	79,253,227
	Total-Reconciliation to Asset History Totals	26,755,568,759	(10,851,194,730)	15,904,374,029
	Sept 2025 Asset 1020 Report	26,755,568,759	(10,851,194,730)	15,904,374,029
	Difference	(0)	(0)	(0)

ATTACHMENT C

Summary of Earnings

**SOUTHERN CALIFORNIA GAS COMPANY
SUMMARY OF EARNINGS
NINE MONTHS ENDED SEPTEMBER 30, 2025
(DOLLARS IN MILLIONS)**

<u>Line No.</u>	<u>Item</u>	<u>Amount</u>
1	Operating Revenue	\$4,464
2	Operating Expenses	<u>3,702</u>
3	Net Operating Income	<u><u>\$762</u></u>
4	Weighted Average Rate Base	\$13,698
5	Rate of Return*	7.49%

*Authorized Cost of Capital

ATTACHMENT D

Acronyms and Abbreviations

Abbreviation	Description
A	Application
AB	Assembly Bill
ACR	Assigned Commissioner's Ruling
AEs	Account Executives
AI	Artificial Intelligence
AL	Advice Letter
AMP	Arrearage Management Plan
AOBD	Automated Outbound Dialing
APL	Authorized Payment Location
APPRISE	Applied Public Policy Research Institute for Study and Evaluation
AVM	Automated Voice Messaging
BIA GA	Bureau of Indian Affairs General Assistance
BOE	State Board of Equalization
BPO	Branch Payment Office
C&I	Commercial and Industrial
CAB	Consumer Affairs Branch
Cal Advocates	California Public Utilities Commission Public Advocates Office
CalPA	California Public Utilities Commission Public Advocates Office
CalWORKs	California Work Opportunity and Responsibility to Kids
CAM	Common Area Measure
CARB	California Air Resources Board
CARBA	CARE Balancing Account
CARE	California Alternate Rates for Energy
CAREA	CARE Balancing Account
CAS	Concurrent Application System
CBO	Community Based Organization
CCC	Customer Contact Center
CE	Categorical Eligibility
CET	Cost Effectiveness Tool
CETF	California Emerging Technology Fund
CHANGES	Community Help and Awareness with Natural Gas and Electricity Services
CIS	Customer Information System
Commission / CPUC	California Public Utilities Commission
CSD	Community Services and Development
CSE	Cetner for Sustainable Energy
CSID	Consumer Service and Information Division
CSR	Customer Service Representative
CVA	Combustion and Ventilation Air
CWR	Career Workforce Readiness
CX	Customer Experience
D.	Decision

DAC	Disadvantaged Communities
DACAG	Disadvantaged Communities Advisory Group
DAPBA	Direct Assistance Program Balancing Account
DCSD	Department of Community Services and Development
DMV	Department of Motor Vehicles
E&A	Enrollment and Assessment
ECPT	Equal Cent Per Therm
ED	Energy Division
EE	Energy Efficiency
EE Guide	Energy Education and Resource Guide
EERMC	Energy Efficiency Resource Management Council
ESA	Energy Savings Assistance Program
ESACET	ESA Cost-Effectiveness Test
ESJ	Environmental and Social Justice
FAU	Forced Air Units
FBO	Faith Based Organization
FERA	Family Electric Rate Assistance
FPG	Federal Poverty Guidelines
FPL	Federal Poverty Level
FS	Fuel Substitution
FTE	Full Time Employee
GAF	Gas Assistance Fund
GHG	Green House Gas
GRC	General Rate Case
HCS	Health, Comfort and Safety
HCV	Housing Choice Voucher
HE	High Efficiency
HISR	Home Improvement Salesperson Registration
HUD	Department of Housing and Urban Development
HUD-VASH	HUD Veterans Affairs Supportive Housing
HVAC	Heating, Ventilation and Air Conditioning
IE	Independent Evaluators
Interim Model	Interim Probability Model
IOUs	Investor Owned Utilities
IQ	Income Qualified
IQP	Income Qualified Programs
IT	Information Technology
IVA	Intelligent Virtual Assistant
IVR	Interactive Voice Recognition
KPIs	Key Performance Indicators
LADWP	Los Angeles Department of Water and Power
LEP	Limited English Proficiency

LIHEAP	Low Income Home Energy Assistance Program
LINA	Low Income Needs Assessment
LIOB	Low Income Oversight Board
LIRA	Low Income Rate Payer Assistance
ME&O	Marketing, Education and Outreach
MF	Multifamily
MFCP	Multifamily Central Portal
MFWB	Multifamily Whole Building
MMS	Multimedia Messaging Service
MOU	Memorandum of Understanding
NEB	Non-Energy Benefits
NGAT	Natural Gas Appliance Testing
NSLP	National School Lunch Program
OCR	Optical Character Recognition
OIR	Order Instituting Rulemaking
OP	Ordering Paragraph
P&G	Potential and Goals
PBI	Performance Based Incentive
PEV	Post Enrollment Verification
PEV SWG	PEV Sub-Working Group
PFM	Petition For Modification
PG&E	Pacific Gas and Electric
PP/IS	Program Policy/Installation Standards
PPIC	Public Policy Institute of California
PPP	Public Purpose Program
PRG	Procurement Review Group
PRIZM	Potential Rating Index for Zip Marketers
PU	Public Utility Code
PUC	Public Utility Code
PY	Program Year
RFP	Request for Proposal
RHA	Richard Heath and Associates
RNG	Renewable Natural Gas
SB	Senate Bill
SCE	Southern California Edison
SDG&E	San Diego Gas and Electric
SEC	Service Establishment Charge
SF	Single-Family
SGIP	Self-Generation Incentive Program
SMS	Short Message Service
SNAP	CalFresh/Supplemental Nutrition Assistance Program
SoCalGas	Southern California Gas Company

SOMAH	California's Solar on Multifamily Affordable Housing
SPOC	Single Point of Contact
SSI	Supplemental Security Income
SSVF	Support Services for Veterans Families
SWG	Sub Working Group
TAC	Technical Advisory Committee
TANF	Temporary Assistance for Needy Families
TDD	Telecommunication Device for the Deaf
TELACU	The East Los Angeles Community Union
TSB	Total System Benefit
TURN	The Utility Reform Network
TY	Test Year
UI	User Interface
UX	User Experience
VA	Department of Veterans Affairs
VAMCs	Veterans at VA Medical Centers
VASH	Veterans Affairs Supportive Housing
VITA	Volunteer Income Tax Assistance
WCAG	Web Content Accessibility Guidelines
WE&T	Workforce Education and Training
WG	Working Group
WIC	Women, Infants and Children

ATTACHMENT E

Tables

Southern California Gas Company
 Table 1: CARE Participation and Enrollment Percentage Goals

CARE Goals	Approved FY 2026 (D 21-06-015)	Proposed FY 2027 (A 25-06-023)	FY 2028	FY 2029	FY 2030	FY 2031	FY 2032	FY 2033
Participation/ Enrollment Goal	95%	95%	100%	98%	98%	96%	95%	95%

Southern California Gas Company
Table 2: CARE Proposed Budgets

Categories	Approved 2020 (D-21-06-015)	Proposed 2027 (A-25-06-023)	FY 2025	FY 2029	FY 2030	FY 2031	FY 2032	FY 2033	Total (2025-2033)
CARE Administrative Budget	\$10,915,863	\$11,361,664	\$12,966,332	\$13,363,956	\$13,514,573	\$13,844,017	\$13,860,423	\$14,284,199	\$81,833,698
CARE Subsidy Budget	\$144,495,405	\$221,138,371	\$207,409,380	\$199,916,031	\$191,414,660	\$182,013,937	\$174,370,996	\$167,063,453	\$1,122,188,352
CARE Administrative + Subsidy Budget	\$155,411,268	\$232,399,835	\$220,375,711	\$213,279,988	\$204,929,233	\$195,857,954	\$188,231,418	\$181,347,651	\$1,204,022,050

Southern California Gas Company
FY 2028 - 2033 CARE Table B-1: CARE Program Budget

CARE Budget Categories	Approved FY 2026 (D 21-06-015)	Proposed FY 2027 (A 25-06-023)	FY 2028	FY 2029	FY 2030	FY 2031	FY 2032	FY 2033	Total FY15 2028-2033
Outreach	\$4,707,071	\$4,848,283	\$4,761,941	\$4,904,799	\$5,051,943	\$5,203,501	\$5,359,606	\$5,520,394	\$30,802,183
Processing Certification, Recertification	\$2,415,355	\$2,487,816	\$2,656,223	\$2,744,586	\$2,836,193	\$2,931,181	\$3,029,695	\$3,131,887	\$17,829,766
Post Enrollment Verification	\$269,025	\$277,096	\$337,224	\$347,340	\$357,761	\$368,493	\$379,548	\$390,935	\$2,181,901
Enrollment and Reenrollment Verification (SCE Only)									\$0
IT Programming	\$1,171,431	\$1,206,574	\$2,536,626	\$2,626,862	\$2,471,227	\$2,429,649	\$2,139,674	\$2,196,349	\$14,400,387
Regulatory Compliance***	\$597,258	\$615,176	\$459,960	\$472,499	\$443,418	\$500,602	\$514,304	\$484,534	\$2,875,316
General Administration	\$1,231,275	\$1,268,213	\$1,640,446	\$1,689,660	\$1,740,350	\$1,792,540	\$1,846,337	\$1,901,727	\$10,611,080
Measurement & Evaluation**	\$0	\$31,250	\$61,610	\$63,459	\$96,612	\$98,573	\$69,343	\$133,923	\$523,521
Pilots and Studies	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
CFUC									
Energy Division Staff	\$86,946	\$89,554	\$75,000	\$77,250	\$79,568	\$81,955	\$84,413	\$86,946	\$485,181
CHANGES†	\$437,502	\$437,502	\$437,502	\$437,502	\$437,502	\$437,502	\$437,502	\$437,502	\$2,625,012
SUBTOTAL ADMINISTRATIVE COSTS	\$10,915,863	\$11,381,464	\$12,966,532	\$13,363,956	\$13,514,573	\$13,844,017	\$13,860,422	\$14,384,197	\$81,883,698
CARE Subsidy Budget	\$144,495,405	\$221,138,371	\$207,409,280	\$199,916,031	\$191,414,660	\$182,013,937	\$174,370,996	\$167,063,453	\$1,122,188,357
TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	\$155,411,268	\$232,399,835	\$220,375,811	\$218,279,988	\$204,929,233	\$195,857,954	\$188,291,418	\$181,347,651	\$1,204,072,055

Notes:

* CHANGES is managed by the Commission's Consumers Affairs Branch and Energy Division staff.

** The CARE portion of the LINA Needs Assessment is incorporated within the Measurement & Evaluation budget.

CARE-related assessment activities are embedded in the M&E cost line for the following program years: FY 2028 - \$31,250, FY 2030 - \$31,250, FY 2031 - \$31,250 and FY 2033 - \$62,500.

*** Includes forecasted CARE Eligibility Estimates Costs

Southern California Gas Company
 PY 2028 - 2033 CARE Table B-4: CARE Enrollment/Participation

	Total Enrolled 12-31-24 (1)	Total Enrolled Through November 2025 (2)	Estimated PY2025 Net Enrollments (3)	Estimated Year End PY2025 Participation (3a)	Estimated PY 2025 Goal Rate (a)	Estimated PY 2025 Net Enrollments (a)	Estimated Year End PY2025 Participation (3a)	Estimated PY 2025 Goal Rate (a)	% changes in enrollment 2025 to 2026 (4)	Estimated PY 2026 Net Enrollments (a)	Estimated Year End PY 2026 Participation (3a)	% changes in enrollment 2026 to 2027 (4)	Estimated PY 2027 Goal Rate (a)	% changes in enrollment 2026 to 2027 (4)
(Source)	1,756,132	1,738,775	-17,357	1,729,600	109%	-38,511	1,691,089	105%	-2.2%	-23,558	1,667,531	103%		-1.4%
Estimated PY 2028 Net Enrollments	-36,631	1,630,900		Estimated PY 2028 Net Enrollments (3a)	Estimated PY 2028 Goal Rate (a)	Estimated PY 2028 Net Enrollments (a)	Estimated Year End PY 2028 Participation (3a)	Estimated PY 2028 Goal Rate (a)	% changes in enrollment 2027 to 2028 (4)	Estimated PY 2029 Net Enrollments (a)	Estimated Year End PY 2029 Participation (3a)	% changes in enrollment 2029 to 2030 (4)	Estimated PY 2030 Goal Rate (a)	% changes in enrollment 2029 to 2030 (4)
			-2.2%	-23,097	1,607,813	98%	-1.4%	-7,099	1,600,714	97%	-0.4%			
Estimated PY 2031 Net Enrollments	-7,418	1,593,296	-0.5%	-7,768	1,585,528	95%	-0.5%	8,747	1,594,275	95%	0.6%			

Notes

- (a) Estimated Goal Rate will fluctuate based on updated CARE Eligibility information.
- (1) Low-Income Annual Report for Program Year 2024 filed July 1, 2025
- (2) CARE Net Enrollment as of November 2025 Monthly Report
- (3) Based on most recent estimates from 2025 enrollments and 2025% filed eligibility factors for CARE (77.48%)
- (3a) SoCalGas assumes estimated eligible customers meter growth rate as filed in the TCAP for 2024 GRC
- (4) Assumes maintaining or exceeding program goal of 90% enrollment

Table 1a: ISA Portfolio (ISA MAIN, MPWB, other new program)

Category	kWh	kW	Therms [1]	Budget[1]	Energy Savings Assistance Cost Effectiveness Test (ESACET)	Resource Test [1]	TRC [2]	PAC [2]	RDM [2]	SCT Base	SCT High
Approved FY 2024(D.21-06-015)			1,435,230	\$ 123,541,870							
Proposed FY 2027(A.25-06-000)			1,435,230	\$ 123,546,959							
PY 2028			1,435,094	\$ 103,686,325	1.01	0.67	0.38	0.38	0.28	0.56	0.56
PY 2029			1,435,094	\$ 106,510,790	1.06	0.68	0.39	0.39	0.29	0.57	0.57
PY 2030			1,435,094	\$ 105,796,104	1.05	0.70	0.40	0.40	0.30	0.58	0.58
PY 2031			1,435,094	\$ 112,997,287	1.06	0.71	0.41	0.41	0.30	0.59	0.59
PY 2032			1,435,094	\$ 114,387,206	1.07	0.73	0.42	0.42	0.31	0.61	0.61
PY 2033			1,435,094	\$ 119,878,822	1.08	0.75	0.43	0.43	0.32	0.62	0.62
Total Request (2028-2033)	-	-	9,728,568	\$ 661,886,723							

Table 1b: ISA MAIN

Category	kWh	kW	Therms [1]	Budget[1]	Energy Savings Assistance Cost Effectiveness Test (ESACET)	Resource Test [1]	TRC [2]	PAC [2]	RDM [2]	SCT Base	SCT High
Approved FY 2024(D.21-06-015)											
Proposed FY 2027(A.25-06-000)											
PY 2028			1,299,640	\$ 87,682,671	0.91	0.57	0.31	0.31	0.24	0.46	0.46
PY 2029			1,299,640	\$ 90,436,545	0.94	0.58	0.32	0.32	0.25	0.47	0.47
PY 2030			1,299,640	\$ 93,149,641	0.94	0.59	0.33	0.33	0.25	0.47	0.47
PY 2031			1,299,640	\$ 95,944,131	0.95	0.61	0.33	0.33	0.26	0.48	0.48
PY 2032			1,299,640	\$ 98,822,454	0.96	0.62	0.34	0.34	0.27	0.49	0.49
PY 2033			1,299,640	\$ 101,787,128	0.97	0.64	0.35	0.35	0.27	0.5	0.5
Total Request (2028-2033)	-	-	7,796,640	\$ 567,942,370							

Table 1c: ISA MPWB & CAM

Category	kWh	kW	Therms [1]	Budget[1]	Energy Savings Assistance Cost Effectiveness Test (ESACET)	Resource Test [1]	TRC [2]	PAC [2]	RDM [2]	SCT Base	SCT High
Approved FY 2024(D.21-06-015)											
Proposed FY 2027(A.25-06-000)											
PY 2028			328,654	\$ 15,686,894	1.35	1.29	0.91	0.93	0.51	1.41	1.41
PY 2029			328,654	\$ 16,076,235	1.37	1.32	0.95	0.95	0.52	1.44	1.44
PY 2030			328,654	\$ 16,536,442	1.39	1.36	0.97	0.97	0.54	1.47	1.47
PY 2031			328,654	\$ 17,053,154	1.42	1.39	0.99	0.99	0.55	1.49	1.49
PY 2032			328,654	\$ 17,564,751	1.44	1.42	1.02	1.02	0.57	1.53	1.53
PY 2033			328,654	\$ 18,091,694	1.47	1.46	1.04	1.04	0.59	1.56	1.56
Total Request (2028-2033)	-	-	1,923,926	\$ 100,946,353							

[1] D.21-06-015 authorized annual ISA portfolio energy savings goals and did not approve specific annual goals for ISA Main or MPWB.

Cost Effectiveness Notes:

[1] Formerly known as the Resource TRC, updated per June 2018 Recommendations of the ISA Cost Effectiveness Working Group.

[2] Provided for PY2021 through PY2026 in compliance with Decision 19-05-019.

[3] SCT provided in compliance with D.24-07-015-OP1.

Southern California Gas Company

Table 6: Annual ESA Program Household Treatment Annual and Program Cycle Forecast ¹

PY	Forecast
2028	92,369
2029	92,369
2030	92,369
2031	92,369
2032	92,369
2033	92,369
Total	554,214

1 The household treatment goals and targets for PYs 2028-2033 are for the entire ESA Portfolio

Table 6a: ESA Program Energy Savings Annual Forecast and Program Cycle Goal (kWh, kW, Therms) ²

Category	kWh	kW	Therms Forecast
2028	N/A	N/A	1,620,094
2029	N/A	N/A	1,620,094
2030	N/A	N/A	1,620,094
2031	N/A	N/A	1,620,094
2032	N/A	N/A	1,620,094
2033	N/A	N/A	1,620,094
TOTAL	N/A	N/A	9,720,566

2 The Proposed Annual Energy Savings Goals (kWh, kW, and Therms) for PYs 2028-2033 are for the entire ESA Portfolio

Southern California Gas Company
 ESA Table 7: ESA Portfolio Budget by Category

ESA Program Budget Categories	Approved FY 2026 (D.21-06-015)	Proposed FY 2027 (A.25-06-023)	FY 2028	FY 2029	FY 2030	FY 2031	FY 2032	FY 2033	Total Request (2028-2033)
EE Budget¹									
EE Main	\$ 82,844,757	\$ 82,844,757	\$ 103,408,525	\$ 106,510,780	\$ 109,706,104	\$ 112,997,287	\$ 116,387,206	\$ 119,878,822	\$ 668,888,723
EE-Pilots	\$ 6,510,545								\$ -
EE-MF	\$ 20,563,740	\$ 27,380,263							\$ -
EE Subtotal	\$ 109,919,042	\$ 110,225,020	\$ 103,408,525	\$ 106,510,780	\$ 109,706,104	\$ 112,997,287	\$ 116,387,206	\$ 119,878,822	\$ 668,888,723
Administrative²									
Regulatory Compliance	\$ 513,413	\$ 528,815	\$ 574,848	\$ 592,094	\$ 609,857	\$ 628,152	\$ 646,997	\$ 666,407	\$ 3,718,356
General Administration	\$ 8,050,562	\$ 8,292,079	\$ 10,037,425	\$ 10,234,482	\$ 10,491,499	\$ 10,816,267	\$ 11,144,270	\$ 11,483,327	\$ 64,207,268
Administrative Subtotal	\$ 8,563,975	\$ 8,820,894	\$ 10,612,273	\$ 10,826,576	\$ 11,101,955	\$ 11,444,419	\$ 11,791,267	\$ 12,149,734	\$ 67,925,624
Direct Implementation (DI)²									
Training Center	\$ 827,048	\$ 851,859	\$ 946,136	\$ 964,223	\$ 993,150	\$ 1,022,944	\$ 1,053,632	\$ 1,085,241	\$ 6,055,379
Workforce Education and Training	\$ 1,586,833	\$ 1,634,138	\$ 1,125,000	\$ 1,125,000	\$ 1,125,000	\$ 1,125,000	\$ 1,125,000	\$ 1,125,000	\$ 6,750,000
Inspections	\$ 2,740,450	\$ 2,822,664	\$ 2,740,450	\$ 2,822,664	\$ 2,907,344	\$ 2,994,564	\$ 3,084,401	\$ 3,176,933	\$ 17,726,356
EE-MF - SPOC	\$ 308,278	\$ 317,526	\$ 325,000	\$ 340,000	\$ 365,000	\$ 370,000	\$ 395,000	\$ 410,000	\$ 2,205,000
Other DI Costs	\$ 1,462,019	\$ 1,505,880	\$ 1,788,688	\$ 1,842,349	\$ 1,897,619	\$ 1,954,548	\$ 2,013,184	\$ 2,073,590	\$ 11,569,967
Marketing and Outreach²									
EM&V ²									
Studies	\$ 200,000	\$ 389,750	\$ 31,250	\$ 95,000	\$ 243,250	\$ 243,250	\$ 211,000	\$ 157,500	\$ 981,250
CPUC Energy Division	\$ 107,152	\$ 110,367	\$ 112,574	\$ 114,826	\$ 117,122	\$ 119,465	\$ 121,854	\$ 124,291	\$ 710,133
DI + Marketing & Outreach + EM&V Subtotal	\$ 4,491,830	\$ 4,809,820	\$ 10,154,458	\$ 10,396,413	\$ 10,740,837	\$ 10,922,122	\$ 11,096,423	\$ 11,244,897	\$ 64,552,146
Portfolio Total	\$ 122,974,847	\$ 123,855,734	\$ 124,172,251	\$ 127,738,769	\$ 131,548,296	\$ 135,363,828	\$ 139,274,896	\$ 143,278,452	\$ 801,366,492
Percentage of Administrative Costs (Adminy>Total Portfolio)		7%	9%	8%	8%	8%	8%	8%	8%

Notes:

1 - EE Budget includes measure (equipment) cost + implementer/subcontractor outreach/education training/installation cost (if outsourced)

2 - These cost categories conform to the definition of costs as used by Energy Efficiency programs and defined in Appendix C of the EE Policy Manual V2, April 2020.

See D.21-06-015 OP 112

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Table 8: Concurrent Application System (CAS) Budget

	2025 ¹	2026 ¹	2027 ¹	2028 ²	2029 ²	2030 ³	2031 ³	2032 ³	2033 ³
Contract ⁴	\$514,000	\$398,000	\$101,000	\$105,000	\$108,000	\$111,000	\$114,000	\$118,000	\$121,000
SoCalGas	\$1,771,000	\$947,000	\$650,000	\$500,000	\$500,000				
Total	\$2,285,000	\$1,345,000	\$751,000	\$605,000	\$608,000	\$111,000	\$114,000	\$118,000	\$121,000

Notes:

1 - Budget approved in Resolution E-5394

2 - Res E-5394 directs 2028 and 2029 to be included in the next application for approval.

3 - Forecasted costs for IOU maintenance.

4 - Res E-5394 approved Total Contract amount of \$4,051,000 for the next 3 years (2025, 2026, 2027). SoCalGas's allocation is 25%

5 - SoCalGas's costs were presented in its AL 4543E/3365-G.

Southern California Gas Company
 PY 2028 - 2033 ESA Table A-2: Projected Participants by Housing Type

Projected Customers Treated	Approved FY 2026 (D 21-06-015) ¹	Proposed FY 2027 (A 25-06-023) ²	FY 2028 ³	FY 2029 ³	FY 2030 ³	FY 2031 ³	FY 2032 ³	FY 2033 ³
Gas and Electric Customers								
Single Family								
Multi-family								
Mobile Homes								
Owners/Renters - Total	69,837	69,837	63,066	63,066	63,066	63,066	63,066	63,066
MFWB Customers								
Properties								
Multi-family Tenant Units								
Units Indirectly Treated (CAM)								
Owners/Renters - Total			29,303	29,303	29,303	29,303	29,303	29,303

- (1) D 21-06-015, Attachment 1 - Table 6: ESA Household Treatment Goals & Targets, for FY 2026 presents data at the portfolio level and does not provide a breakdown of projected customers treated by category (SF, MF, MH).
- (2) SoCalGas's 2027 Bridge Funding Application (A 25-06-023), Table 5: ESA Annual Energy Savings Goals, for proposed FY 2027 presents data at the portfolio level and does not provide a breakdown of projected customers treated by category.
- (3) The 2028-2033 Annual ESA Program Household Treatment and Program Cycle Forecast Goals and Targets does not provide a breakdown of projected customers treated by category (SF, MF, MH).

Southern California Gas Company
PY 2028 - 2033 ESA Table A-4 ESA Bill Savings

ESA Table A-4a					
Bill Savings Calculations by Program Year (ESA Main - SF, MH)					
Program Year	Program Costs	Program Lifecycle Bill Savings (1)	Program Bill Savings/ Cost Ratio	Per Home Average Lifecycle Bill Savings	Number of Participants
2028	\$87,802,471	\$25,871,850	0.29	\$ 410	63,066
2029	\$90,436,545	\$26,729,481	0.30	\$ 424	63,066
2030	\$93,149,641	\$27,444,173	0.29	\$ 435	63,066
2031	\$95,944,131	\$28,301,803	0.29	\$ 449	63,066
2032	\$98,822,454	\$29,159,434	0.30	\$ 462	63,066
2033	\$101,787,128	\$30,017,064	0.29	\$ 476	63,066

(1) Program Lifecycle bill savings were calculated based on the most recent data presented in Table 9 (Bill Savings Calculations) of the 2024 Annual Report.

ESA Table A-4b					
Bill Savings Calculations by Program Year - MFWB (In-Unit and CAM)					
Program Year	Program Costs	Program Lifecycle Bill Savings	Program Bill Savings/ Cost Ratio	Per Home Average Lifecycle Bill Savings	Number of Participants
2028	\$15,606,054	\$6,384,229	0.41	\$ 218	29,303
2029	\$16,074,235	\$6,595,861	0.41	\$ 225	29,303
2030	\$16,556,462	\$6,772,221	0.41	\$ 231	29,303
2031	\$17,053,156	\$6,983,853	0.41	\$ 238	29,303
2032	\$17,564,751	\$7,195,485	0.41	\$ 246	29,303
2033	\$18,091,694	\$7,407,117	0.41	\$ 253	29,303

Southern California Gas Company
FY 2028 - 2033 CARE Table D-1: CARE/ESA Gas Rate impacts

Category [1]	Average Rate	CARE Subsidy	CARE	ESA Program	ESA Program	Total	Average Rate
2028	Excluding	Portion of Rate	Administration	Portion of Rate	Administration	CARE/ESA	Including
Customer Type	CARE/ESA		Portion of Rate		Portion of Rate	Surcharge	CARE/ESA
	Surcharge						Surcharge
Residential (non CARE)	\$0.03715	\$0.04699	\$0.00310	\$0.04254	\$0.00931	0.10194	0.13909
Residential (CARE)	\$0.03715	\$0.00000	\$0.00000	\$0.04254	\$0.00931	0.05185	0.08899
Commercial [2]	\$0.10965	\$0.04699	\$0.00310	\$0.00000	\$0.00000	0.05009	0.15974
Industrial [3]	\$0.00896	\$0.04699	\$0.00310	\$0.00000	\$0.00000	0.05009	0.05905
Agricultural	NA	NA	NA	NA	NA	0.00000	NA
Lighting	NA	NA	NA	NA	NA	0.00000	NA
System	\$0.03539	\$0.04699	\$0.00310	\$0.01971	\$0.00431	0.07411	0.10950

Category [1]	Average Rate	CARE Subsidy	CARE	ESA Program	ESA Program	Total	Average Rate
2029	Excluding	Portion of Rate	Administration	Portion of Rate	Administration	CARE/ESA	Including
Customer Type	CARE/ESA		Portion of Rate		Portion of Rate	Surcharge	CARE/ESA
	Surcharge						Surcharge
Residential (non CARE)	\$0.03715	\$0.04499	\$0.00318	\$0.04397	\$0.00951	0.10165	0.13880
Residential (CARE)	\$0.03715	\$0.00000	\$0.00000	\$0.04397	\$0.00951	0.05348	0.09063
Commercial [2]	\$0.10965	\$0.04499	\$0.00318	\$0.00000	\$0.00000	0.04817	0.15782
Industrial [3]	\$0.00896	\$0.04499	\$0.00318	\$0.00000	\$0.00000	0.04817	0.05713
Agricultural	NA	NA	NA	NA	NA	0.00000	NA
Lighting	NA	NA	NA	NA	NA	0.00000	NA
System	\$0.03580	\$0.04499	\$0.00318	\$0.02037	\$0.00441	0.07295	0.10875

Category [1]	Average Rate	CARE Subsidy	CARE	ESA Program	ESA Program	Total	Average Rate
2030	Excluding	Portion of Rate	Administration	Portion of Rate	Administration	CARE/ESA	Including
Customer Type	CARE/ESA		Portion of Rate		Portion of Rate	Surcharge	CARE/ESA
	Surcharge						Surcharge
Residential (non CARE)	\$0.03715	\$0.04275	\$0.00320	\$0.04544	\$0.00978	0.10117	0.13832
Residential (CARE)	\$0.03715	\$0.00000	\$0.00000	\$0.04544	\$0.00978	0.05523	0.09237
Commercial [2]	\$0.10965	\$0.04275	\$0.00320	\$0.00000	\$0.00000	0.04595	0.15560
Industrial [3]	\$0.00896	\$0.04275	\$0.00320	\$0.00000	\$0.00000	0.04595	0.05491
Agricultural	NA	NA	NA	NA	NA	0.00000	NA
Lighting	NA	NA	NA	NA	NA	0.00000	NA
System	\$0.03707	\$0.04275	\$0.00320	\$0.02024	\$0.00453	0.07072	0.10779

Category [1]	Average Rate	CARE Subsidy	CARE	ESA Program	ESA Program	Total	Average Rate
2031	Excluding	Portion of Rate	Administration	Portion of Rate	Administration	CARE/ESA	Including
Customer Type	CARE/ESA		Portion of Rate		Portion of Rate	Surcharge	CARE/ESA
	Surcharge						Surcharge
Residential (non CARE)	\$0.03715	\$0.04029	\$0.00326	\$0.04696	\$0.01002	0.10052	0.13767
Residential (CARE)	\$0.03715	\$0.00000	\$0.00000	\$0.04696	\$0.01002	0.05697	0.09412
Commercial [2]	\$0.10965	\$0.04029	\$0.00326	\$0.00000	\$0.00000	0.04355	0.15320
Industrial [3]	\$0.00896	\$0.04029	\$0.00326	\$0.00000	\$0.00000	0.04355	0.05251
Agricultural	NA	NA	NA	NA	NA	0.00000	NA
Lighting	NA	NA	NA	NA	NA	0.00000	NA
System	\$0.03673	\$0.04029	\$0.00326	\$0.02175	\$0.00464	0.06994	0.10667

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FY 2028 - 2033 CARE Table D-1: CARE/ESA Gas Rate impacts (continued)

Category [1]	Average Rate	CARE Subsidy	CARE	ESA Program	ESA Program	Total	Average Rate
2032	Excluding	Portion of Rate	Administration	Portion of Rate	Administration	CARE/ESA	Including
Customer Type	CARE/ESA		Portion of Rate		Portion of Rate	Surcharge	CARE/ESA
	Surcharge						Surcharge
Residential (non CARE)	\$0.03715	\$0.03832	\$0.00325	\$0.04852	\$0.01024	0.10033	0.13747
Residential (CARE)	\$0.03715	\$0.00000	\$0.00000	\$0.04852	\$0.01024	0.05876	0.09591
Commercial [2]	\$0.10965	\$0.03832	\$0.00325	\$0.00000	\$0.00000	0.04156	0.15121
Industrial [3]	\$0.00896	\$0.03832	\$0.00325	\$0.00000	\$0.00000	0.04156	0.05052
Agricultural	NA	NA	NA	NA	NA	0.00000	NA
Lighting	NA	NA	NA	NA	NA	0.00000	NA
System	\$0.03710	\$0.03832	\$0.00325	\$0.02248	\$0.00475	0.06878	0.10588

Category [1]	Average Rate	CARE Subsidy	CARE	ESA Program	ESA Program	Total	Average Rate
2033	Excluding	Portion of Rate	Administration	Portion of Rate	Administration	CARE/ESA	Including
Customer Type	CARE/ESA		Portion of Rate		Portion of Rate	Surcharge	CARE/ESA
	Surcharge						Surcharge
Residential (non CARE)	\$0.03715	\$0.03644	\$0.00333	\$0.05013	\$0.01047	0.10037	0.13752
Residential (CARE)	\$0.03715	\$0.00000	\$0.00000	\$0.05013	\$0.01047	0.06060	0.09774
Commercial [2]	\$0.10965	\$0.03644	\$0.00333	\$0.00000	\$0.00000	0.03977	0.14942
Industrial [3]	\$0.00896	\$0.03644	\$0.00333	\$0.00000	\$0.00000	0.03977	0.04874
Agricultural	NA	NA	NA	NA	NA	0.00000	NA
Lighting	NA	NA	NA	NA	NA	0.00000	NA
System	\$0.03743	\$0.03644	\$0.00333	\$0.02322	\$0.00485	0.06784	0.10527

The table above is based off of January 1, 2026 Public Purpose Program Surcharge rates.

[1] Category types will vary across utilities.

[2] Core C/I- Core Commercial and Industrial Customers generally use smaller quantities of gas, and the utility purchases their gas.

[3] Noncore C/I-Non-Core Commercial and Industrial Customers are generally large gas users who purchase their own natural gas supplies for SoCalGas to transport.

ATTACHMENT F

SoCalGas IQP Compliance Requirements Sunset List

SoCalGas IQP Compliance Requirements Sunset List

CPUC Directive	Directive Reference	Description of Compliance Item	Recommended Action	Justification
D.17-12-009	ESA Reporting >text=various	Text p.69: We direct the utilities to track in its reporting how many visits are "first touches" (households that have not received ESA treatment) versus "go backs." The utilities should track the number of "go backs," the energy savings resulting from the treatment from the "go back" and additional measures to determine what percentage of the utility's energy savings target (as discussed above) is a result from a "go back" versus a "first touch" for a customer.	Retire	This requirement is no longer applicable because the ESA Program no longer track first touches and go backs. ED approved the removal of these metrics in the monthly reports.
D.17-12-009	text-p.63	D.17-12-009: ...we retain the directive for the IOU's to host a workshop with CSD. For efficiency, this workshop shall be incorporated in the public meetings directed in D.12-08-044, OP 5 directing the IOU's to review and discuss the prior years' CARE and ESA Program activities. D.12-08-044: These Utilities shall convene a minimum of one public meeting per year, within 60 days of their filing of the annual reports and other public meetings as deemed necessary by either the Utilities, ED, the ALJ or the Commission.	Retire	Discussion concerning program leveraging could be absorbed into the IQP workshop proposal for the next program cycle. CSD supports sunseting this requirement.
D.21-06-015	OP129	Pacific Gas and Electric Company, Southern California Edison Company, San Diego Gas & Electric Company and Southern California Gas Company must continue the multifamily common area measures annual reporting requirements and report the normalized energy use and savings in the Energy Savings Assistance program reports per the reporting template to be developed and issued by Energy Division staff.	Retire	Normalized energy savings analysis is not a suitable methodology for multi-family properties, as the methodology requires a minimum energy saving of 10% to effectively isolate the change in energy usage, which the ESA MFWB common area measures fall short of. The methodology also requires that individual meters connected to the specific energy efficiency interventions be isolated and recorded to enable the saving analysis. For multi-family properties, multiple meters are often involved, and data is not available (on site or in utility databases) to enable a one-to-one match for a specific end use and the utility meter connected to the end use.
D.21-06-015	p. 434 - 435	The IOU's must also increase their public notification efforts by posting a notice of this meeting [Annual ESA/CARE Meeting 60 days after filing the Annual Report] on their CARE/ESA websites.	Modify	The directive was intended to encourage public participation in the annual report public meeting. However, the requirement to post meeting notices on the program page has not resulted in significant increase in the public participation in the annual report public meetings. IQP customers visits SoCalGas's Customer Assistance webpages to seek information CARE and ESA Program offerings and how they can qualify for the program(s). Customers do not typically seek information concerning the overall IQP administration and budget information. It may be more appropriate for the Commission to include IQP annual report meeting information on CPUC's events calendar.

ATTACHMENT G

Census Tracts in SoCalGas's Service Territories

Identified Census Tracts within SoCalGas Service Territories by City and Zip Codes since 2022 (DAC's last updated version as designated by CalEPA using their CalEnviroScreen 3.0 Tool.)

Fresno County: 46 Zip Codes between 92506 – 93725
Identified Cities: BURRELL, CARUTHERS, DEL REY, DINUBA, FOWLER, FRESNO, KERMAN, KINGSBURG, LATON, ORANGE COVE, PARLIER, RAISIN CITY, REEDLEY, RIVERDALE, SAN JOAQUIN, SELMA
ZIP CODES: 93656, 93609, 93616, 93618, 93625, 93706, 93725, 93630, 93631, 93242, 93618, 93646, 93648, 93652, 93654, 92506, 93656, 93660, 93662
Imperial County: 19 Zip Codes between 92227 – 92585
Identified Cities: BRAWLEY, CALEXICO, CALIPATRIA, EL CENTRO, IMPERIAL, NILAND, SEELEY, WESTMORLAND
ZIP CODES: 92227, 92231, 92233, 92243, 92251, 92257, 92273, 92227, 92585
Kern County: 49 Zip Codes between 91744 – 93501
Identified Cities: ARVIN, BAKERSFIELD, BUTTONWILLOW, DELANO, FELLOWS, LOST HILLS, MARICOPA, MC FARLAND, MC KITTRICK, METTLER, MOJAVE, SHAFTER, TAFT, TUPMAN, WASCO
ZIP CODES: 93203, 93307, 93314, 93206, 93215, 93224, 91744, 93249, 93252, 93250, 93249, 93251, 93301, 93501, 93263, 93312, 93268, 93307, 93276, 93280
Kings County: 18 zip codes between 93202 – 93656
Identified Cities: ARMONA, CORCORAN, HANFORD, LATON, LEMOORE, RIVERDALE, STRATFORD
ZIP CODES: 93202, 93212, 93230, 93242, 93245, 93656, 93266
Los Angeles County: 1,506 Zip Codes between 90001-93550
Identified Cities: ALHAMBRA, ARCADIA, ARLETA, ARTESIA, AZUSA, BALDWIN PARK, BELL, BELL GARDENS, BELLFLOWER, BURBANK, CANOGA PARK, CARSON, CERRITOS, CHINO, COMPTON, COVINA, CTY OF CMMRCE, CUDAHY, CYPRESS, DOWNEY, DUARTE, EL MONTE, EL SEGUNDO, ENCINO, GARDENA, GLENDALE, HACIENDA HGTS, HARBOR CITY, HAWAIIAN GDNS, HAWTHORNE, HOLLYWOOD, HUNTINGTON PK, INGLEWOOD, IRWINDALE, LA MIRADA, LA PUENTE, LA VERNE, LAKEWOOD, LANCASTER, LAWNDALE, LITTLEROCK, LOMITA, LONG BEACH, LOS ANGELES, LYNWOOD, MANHATTAN BCH, MAYWOOD, MISSION HILLS, MONROVIA, MONTEBELLO, MONTEREY PARK, N HOLLYWOOD, NORTH HILLS, NORTHRIDGE, NORWALK, PACOIMA, PALMDALE, PANORAMA CITY, PARAMOUNT, PASADENA, PICO RIVERA, PLAYA DEL REY, POMONA, RESEDA, RNCHO DOMINGZ, ROSEMEAD, S EL MONTE, SAN FERNANDO, SAN GABRIEL, SAN PEDRO, SANTA FE SPGS, SANTA MONICA, SHERMAN OAKS, SIGNAL HILL, SOUTH GATE, STUDIO CITY, SUN VALLEY, SYLMAR, TARZANA, TEMPLE CITY, TERMINAL ISL, TORRANCE, VAN NUYS, VENICE, WALNUT PARK, WEST COVINA, WEST HILLS, WHITTIER, WILMINGTON, WINNETKA
ZIP CODES: 91801, 91803, 91006, 91331, 90701, 91702, 91706, 90201, 90706, 91501, 91506, 91303, 91304, 90745, 90810, 90703, 91710, 90059, 90222, 91722, 90040, 90201, 90630, 90241, 90242, 91010, 91731, 91733, 90245, 91316, 90247, 90249, 91201, 91210, 91745, 90710, 90717, 90716, 90250, 90304, 90028, 90255, 90301, 90304, 91706, 90638, 91744, 91746, 91750, 90712, 90805, 92704, 93535, 90260, 93543, 90717, 90802, 90810, 90001, 90292, 90262, 90266, 90270,

91345, 91016, 90640, 91754, 91601, 91607, 91343, 91324, 91325, 90650, 91331, 93550, 91402, 90723, 91103, 90660, 90293, 91766, 91789, 91335, 90220, 91770, 91776, 91733, 91340, 91342, 91776, 90731, 90670, 90401, 90405, 91411, 90755, 90002, 90280, 91604, 91352, 91340, 91342, 91356, 91780, 90731, 90501, 90506, 91401, 91411, 90291, 90255, 91790, 91793, 91307, 90601, 90606, 90744, 91306

Orange County: 160 Zip Codes between 90620-92899

Identified Cities: ANAHEIM, BREA, BUENA PARK, COSTA MESA, FULLERTON, GARDEN GROVE, HUNTINGTN BCH, IRVINE, LA HABRA, LA MIRADA, LAKE FOREST, MIDWAY CITY, ORANGE, PLACENTIA, SANTA ANA, STANTON, TUSTIN, WESTMINSTER

ZIP CODES: 92801, 92899, 92821, 90620, 90622, 92626, 92627, 92821, 92835, 92840, 92844, 92647, 92648, 92618, 90631, 90638, 92630, 92655, 92865, 92868, 92870, 92701, 92799, 90680, 92780, 92683, 92844

Riverside County: 131 Zip codes between 91752-93010

Identified Cities: BANNING, BEAUMONT, BLYTHE, CABAZON, COACHELLA, COLTON, CORONA, HEMET, INDIO, JURUPA VALLEY, LAKE ELSINORE, MENIFEE, MORENO VALLEY, NORCO, NUEVO, PERRIS, RIVERSIDE, SAN JACINTO, THERMAL

ZIP CODES: 92220, 92223, 92225, 92230, 93010, 92236, 92324, 92878, 92883, 92543, 92545, 92201, 92203, 91752, 92509, 92530, 92532, 92585, 92551, 92557, 92860, 92567, 92570, 92571, 92501, 92522, 92582, 92274

San Bernardino County: 205 Zip Codes between 91708 – 92509

Identified Cities BLOOMINGTON, CHINO, COLTON, FONTANA, GRAND TERRACE, HIGHLAND, JURUPA VALLEY, LOMA LINDA, MONTCLAIR, ONTARIO, POMONA, RCH CUCAMONGA, REDLANDS, RIALTO, RIVERSIDE, SN BERNRDNO, UPLAND

ZIP CODES: 92316, 91708, 91710, 92324, 92410, 92335, 92337, 92313, 92346, 92509, 92350, 92373, 91710, 91763, 91761, 91767, 91766, 91730, 91739, 92373, 92374, 92376, 92410, 92509, 92346, 92415, 91785, 91786

Santa Barbara: 93111, 93117

Identified Cities: GOLETA and SANTA BARBARA

ZIP CODES: 93111 and 93117

Tulare County: 51 zip codes between 93219 – 93673

Identified Cities: CUTLER, DINUBA, EARLIMART, EXETER, FARMERSVILLE, HANFORD, KINGSBURG, LINDSAY, ORANGE COVE, OROSI, PIXLEY, PORTERVILLE, REEDLEY, SPRINGVILLE, TERRA BELLA, TRAVER, TULARE, VISALIA

ZIP CODES: 93615, 93670, 93618, 93219, 93221, 93223, 93230, 93631, 93247, 93646, 93647, 93256, 93257, 93654, 93265, 93270, 93673, 93274, 93292

Ventura County: 12 zip codes between 93001 to 93041

Identified Cities: OXNARD, PORT HUENEME, VENTURA

ZIP CODES: 93030, 93036, 93041, 93001