SOUTHERN CALIFORNIA GAS COMPANY

2010-2012 ENERGY EFFICIENCY PORTFOLIO – PROGRAM PERFORMANCE METRICS

TYPE 2A REPORT FOR 2011

Southern California Gas Company

A Sempra Energy utility®

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.

PPM ID	Program ID	Program Performance Metric (PPM)	Metric Type
CIA-1	**SCG3607** **SCG3608** **SCG3609** **SCG3610**	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	**SCG3610**	Number and percent of commercial, industrial, and agricultural customers that created an energy plan via CEI will be tracked by program. Note: 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	**SCG3608**	Number and percent of new, improved, or ETP measures** installed in the commercial, industrial and agricultural programs. Note: ** "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.

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

PPM ID	Program ID	Program Performance Metric (PPM)	Metric Type
CIA-8	**SCG3611**	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. Note: ** "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. Note: ** "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	**SCG3616**	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	**SCG3119**	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.

PPM ID	Program ID	Program Performance Metric (PPM)	Metric Type
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.

PPM ID	Program ID	Program Performance Metric (PPM)	Metric Type
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.

PPM ID	Program ID	Program Performance Metric (PPM)	Metric Type
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 therm 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.

PPM ID	Program ID	Program Performance Metric (PPM)	Metric Type
CS-3	**SCG3649**	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 COMMERICAL 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	**SCG3653**	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	**SCG3651**	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	**SCG3653**	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	**SCG3654**	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[1]" 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.

PPM ID	Program ID	Program Performance Metric (PPM)	Metric Type
MEO-1	**SCG3623**	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.

[1] "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)[1]	a		SEE "TABLE CIA-1_PGE"			SEE "TABLE CIA-1_SCE"			SEE "TABLE CIA-1_SDGE"			SEE "TABLE CIA-1_SCG"			
			% customers 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%	
			% customers in HTR participating in subprograms			1.02%	0.50%	0.57%	1.2%	2.1%	0.5%	4.67%	2.53%	0.54%	0.22%	1.38%	3.57%	
			% Customers in NRA			0.44%	0.24%	0.11%	0.2%	0.3%	0.1%	0.00%	0.00%	0.00%	0.33%	1.22%	1.45%	
			% Customers in Deemed			0.74%	0.43%	0.38%	1.1%	2.4%	0.2%	3.56%	2.64%	1.47%	0.21%	0.33%	1.01%	
			% Customers in Calculated			0.10%	0.13%	0.21%	0.1%	0.2%	0.5%	0.47%	0.27%	0.00%	0.04%	0.25%	0.88%	
			% Customers in CEI			0.00%	0.00%	0.01%	0.0%	0.0%	0.0%	0.00%	0.00%	0.00%	0.00%	0.0%	0.00%	
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.	a	**Total CEI Participants**	2	5	7	5	12	0	3	2	0	5	12	0	Data represents Inception to December 2011
					# Milestones Met	2	4	0	0	2	0	0	0	0	0	2	0	
					Percent	100.0%	80.0%	0.0%	0.0%	16.7%	0.0%	0.0%	0.0%	0.0%	0.0%	16.7%	0.0%	
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.	a	**Total CEI Participants**	2	5	7	5	12	0	3	2	0	5	12	0	Data represents Inception to December 2011
					# Creating Energy Plans	2	5	0	0	2	0	0	0	0	0	2	0	
					Percent	100.0%	100.0%	0.0%	0.0%	16.7%	0.0%	0.0%	0.0%	0.0%	0.0%	16.7%	0.0%	
CIA-7	CIA combined	Deemed Incentives	Number and percent of new, improved, or ETP measures[3] installed in the commercial, industrial and agricultural programs	a	**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.	a	**Total Calculated Measure Occurrences**	1,055	171	804	735	163	192	499	24	0	93	88	16	
					# New, Improved, ETP Occurrences	20	12	72	2	3	0	3	0	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.	a	**Total Participants**	4117			38,232			1620			NA			
					# Participating in Other EE programs	665			260			48			NA			
Comm-2.2	Commercial	Direct Install	Percent of Direct Install participants that participate in other resource programs or OBF.	a		16.15%			0.68%			2.96%			NA			
Comm-3.1	Commercial	Direct Install	Number of participants that are hard to reach (HTR)[1].	a		1188			13,630			436			NA			
Comm-3.2	Commercial	Direct Install	Percent of participants that are hard to reach (HTR)[1].	a		28.86%			35.65%			26.91%			NA			
Ind-1.1	Industrial	Ind	Number of first time[6] participants in energy efficiency programs. (Report disaggregate data by sub-program)	a	**Total First Time Participants**	**539**			**959**			**272**			**331**			
					Calculated	68			19			13			31			
					Deemed	297			810			235			56			
					Non Res Audits	174			127			24			244			
					CEI	0			3			0			0			
Ind-1.2	Industrial	Ind	Percent of first time[6] participants in energy efficiency programs. (Report disaggregate data by sub-program)	a	**% First Time Participants**	**90.1%**			**68.7%**			**52.6%**			**69.7%**			
					Calculated	70.1%			16.4%			28.9%			46.3%			
					Deemed	92.5%			72.5%			53.8%			63.6%			
					Non Res Audits	97.2%			83.6%			68.6%			76.3%			
					CEI	0.0%			27.3%			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	a		3.7%			46.5%			15.0%			49.7%	PG&E's program offered 1 measure (dishwashers); other IOUs offe 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)[1] zip-codes relative to all program participating stores[18]	a		46.8%			41.2%			29.0%			17.0%	
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.)	a		65.6%			1.1%			58.5%			NA	Metric reported in therms; SCE reflects savings for electric-only utility
RES-6	Residential	BCE	Number of participating retailers, and number of retail store locations by retailer, and other resellers receiving training.	a		SEE TABLE "RES-6_BCE_Statewide" FOR LIST OF RETAILER NAMES AND NUMBER OF STORES BY RETAILER									NA	
					# Participating Retailers/ Resellers	14			5			4			NA	
					# of Store Locations	351			171			43			NA	
RES-7	Residential	BCE	Number of participating retailers receiving detailing.	a		351			171			43			NA	
RES-9	Residential	Advanced Lighting	Percent kW/kWh/Quantity of incented products under the Advanced Lighting program as compared to the Basic Lighting program, by product type.	a		**Q**	**% kWh**	**% kW**	**Q**	**% kWh**	**% kW**	**Q**	**% kWh**	**% kW**	NA	ALSO SEE "TABLE RES-9_Statewide"
					Advanced	**29.5%**	**26.3%**	**26.3%**	**40.9%**	**41.4%**	**41.1%**	**58.8%**	**19.6%**	**16.9%**		
					Reflector	58.0%	60.6%	60.6%	18.7%	21.7%	21.8%	3.6%	20.7%	29.6%		
					Dimmable	11.0%	14.1%	14.1%	0.6%	0.4%	0.4%	2.4%	14.5%	16.0%		
					Three-Way	0.0%	0.0%	0.0%	1.9%	2.0%	2.1%	0.1%	0.5%	0.6%		
					Covered	29.7%	23.9%	23.9%	15.9%	14.7%	15.0%	8.1%	35.3%	41.6%		
					Bare Spiral >30 Watts	1.0%	2.4%	2.4%	2.2%	1.5%	1.5%	0.6%	5.9%	6.6%		
					Ext Fixture	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	5.6%	0.0%		
					Int Fixture	0.5%	1.3%	1.3%	0.2%	0.2%	0.2%	0.3%	1.3%	1.3%		
					LED - Seasonal	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	83.6%	0.4%	0.0%		
					Plug-in CFL Lamp	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	5.1%	4.2%		
					LED - Desk Lamp*	PG&E is not pursuing these products			*SCE includes these measures elsewhere			0.0%	0.0%	0.0%		
					Plug-in LED night light*							1.0%	10.6%	0.0%		
					Specialty Lighting	0.0%	0.0%	0.0%	1.4%	0.9%	0.0%	0.0%	0.0%	0.0%		
					Basic (CFL bare spiral <30 W)	**70.5%**	**73.7%**	**73.7%**	**59.1%**	**58.6%**	**58.9%**	**41.2%**	**80.4%**	**83.1%**		
RES-10	Residential	Advanced Lighting	Percent of products incented under the Advanced Lighting Program by distribution channel[10] and by hard-to-reach (HTR)[1] zip-codes.	a	**Distribution Channel**	**%**	**% HTR**		**%**	**% HTR**		**%**	**% HTR**		NA	
					Discount	9.50%	30.91%		23.7%	54.2%		5.1%	1.0%			
					Drug	0.00%	0.00%		0.4%	15.8%		0.0%	0.0%			
					Grocery	30.40%	45.07%		42.3%	54.1%		59.2%	15.2%			
					Hardware	15.90%	54.65%		7.0%	38.7%		0.0%	0.0%			
					Home Improvement	6.00%	19.82%		3.3%	43.4%		33.3%	13.1%			
					Ltg & Electronics	0.00%	0.00%		0.4%	20.3%		0.0%	0.0%			
					Mass Merchandise	9.00%	22.87%		3.6%	40.8%		0.0%	0.0%			
					Membership Club	18.90%	24.13%		19.0%	45.3%		2.3%	0.0%			
					Large Supermarket	1.30%	32.92%		n/a	n/a		0.0%	0.0%			
					Other	9.00%	27.73%		0.3%	48.4%		0.0%	0.0%			
					Total Hard to Reach	36.1%			50.2%			29.4%				

PPM ID	Program	Sub-Program	Metric			Annual Progress for Program Year 2011												Comments
						PGE			SCE			SDGE			SCG			
RES-12	Residential	Basic CFL	Percent of products incented under the Basic Lighting Program by distribution channel[10] and by hard-to-reach (HTR)[1] zip-codes.	a	**Distribution Channel**	%	% HTR		%	% HTR		%	% HTR		NA			
					Discount	19.48%	32.14%		27.5%	51.5%		26.5%	3.6%					
					Drug	0.01%	100%		0.2%	31.0%		0.0%	0.0%					
					Grocery	40.68%	47.81%		40.5%	55.1%		26.4%	7.8%					
					Hardware	2.52%	47.23%		3.6%	28.1%		0.4%	0.3%					
					Home Improvement	7.28%	21.38%		6.2%	49.3%		1.9%	1.1%					
					Ltg & Electronics	n/a	n/a		0.4%	39.1%		0.9%	0.0%					
					Mass Merchandise	8.58%	26.04%		6.7%	39.3%		3.6%	0.0%					
					Membership Club	9.38%	26.26%		14.6%	49.3%		40.2%	0.0%					
					Large Supermarket	0.92%	41.06%		n/a	n/a		0.0%	0.0%					
					Other	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.	a		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.)	a		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.)	a		959			66			131			66			
RES-17	Residential	Whole House Retrofit	Number of enrolled contracting firms participating in the program	a		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	a	**Climate Zone**	**Avoid kW**	**Avg kWh**	**Therm saving**	**Avoid kW**	**Avg kWh**	**Therm saving**	**Avoid kW**	**Avg kWh**	**Therm saving**	**Avoid kW**	**Avg kWh**	**Therm saving**	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
					2	1.1	604	464										
					3	0.4	547	365										
					4	0.7	899	317										
					5	0.2	208	359										
					6				0.63	441	n/a				n/a	n/a	140	
					7							0.83	920	174				
					8				2.01	1373	n/a				n/a	n/a	116	
					9				3.59	3162	n/a				n/a	n/a	182	
					10				2.03	2808	n/a	3.73	4531	191	n/a	n/a	141	
					11	3.9	4374	241										
					12	1.5	1392	288										
					13	3.7	5573	217										
					14				2.88	680	n/a				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	a	**Climate Zone**	**Avoid kW**	**Avg kWh**	**Therm saving**	**Avoid kW**	**Avg kWh**	**Therm saving**	**Avoid kW**	**Avg kWh**	**Therm saving**	**Avoid kW**	**Avg kWh**	**Therm saving**	
						Workpaper pending final approval since 2010; discussions with CPUC ongoing												
RES-20.1	Residential	Whole House Retrofit	Number of homes not passing Quality Assurance/Quality Control review, by IOU	a		90			2			5			2			
RES-20.2	Residential	Whole House Retrofit	Percentage of homes not passing Quality Assurance/Quality Control review, by IOU	a		21.0%			3.0%			8.0%			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 2011and annually thereafter. (Y/N)	a		Yes - PPM was reported twice in 2011. The LMT Roadmap was submitted to Energy Division on January 31, 2011 and with the May 1, 2011 PPM report. Additional details were provided in the June 2011 LMT Annual Report. The LMT Roadmap Study was conducted in 2011, resulting in the Lighting Solution Workbook, which was presented at the LMT Stakeholder Meeting in November. An update to the workbook will be submitted with the LMT Annual Report due June 1, 2012.									NA			
LMT-4	Lighting Market Transform.	LMT	Number of EE lighting measures added, removed, or updated as a result of LMT activities and influence, and reported in annual LMT June Report	a		LMT has influenced and supported several measures for the Residential and Commercial mark segments. In addition, workpapers were developed in 2011 for new measures and are pending CPUC approval. See Narrative Report for more information.									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 (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+%.	a	**T24 Participants**	#	**Total**	%	#	**Total**	%	#	**Total**	%	#	**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	**7783**	5.0%	72	**1398**	5.2%	32	**1524**	2.1%	69	**5577**	1.2%	
					MF 15%-19%	2251		39.0%	6		1.4%	450		28.2%	405		62.1%	PG&E's MF results are from PG&E's Third Party CMFNH program, not CAHP
					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	**5767**	13.3%	13	**426**	3.1%	0	**1596**	0.0%	2	**652**	0.3%	
NC-2	New Construction	CAHP	Percentage of (current year SF CAHP program paid units)/ (SF building permits within service territories from the previous year)	a		**2011 paid**	**2010 permits**	%	**2011 paid**	**2010 permits**	%	**2011 paid**	**2010 permits**	%	**2011 paid**	**2010 permits**	%	
						1,561	13,498	11.6%	1,245	14,538	9%	664	2,267	29.3%	1516	14,538	10.4%	
NC-3	New Construction	CAHP	Percentage of (current year MF CAHP program paid units)/ (MF building permits within service territories from the previous year)	a		2,112	10,078	21.0%	1,974	9,991	20%	74	1,083	6.8%	254	9,911	2.6%	
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	a		204			0			0			0			
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	a		#	**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.	a		59												
HVAC-1.1	HVAC	Upstream HVAC	(a) kW/ton incentivized in the program. (Note: Decrease in metric indicates positive progress), combined with	a		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.	a		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.)[7]	a		AHRI data was not made available to IOUs									NA			
HVAC-3	HVAC	Res ES Quality Installation	Percentage of HVAC contracting companies that are participating in statewide residential QI program as a share of the targeted market[8]	a		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 QI program as a share of the targeted market[8]	a		0.16%			0.04%			0%			Program not launched in 2011			
HVAC-7	HVAC	Quality Maintenance Dev	Measured progress towards specific milestones provided in the project GANTT chart indicating the development/finalization of this IOU program based on Quality Maintenance standards.	a		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).	a		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).	a		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	ME&O	ME&O	Awareness and knowledge of key elements of the Engage360 brand among customer groups specifically targeted by grassroots and social networking phase of the program.	a		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. 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	a	Participating Schools	Total	Title 1	%	Total	Title 1	%	Total	Title 1	%	Total	Title 1	%	
						643	405	63.0%	919	478	52.0%	77	41	53.2%	198	128	64.6%	
WET-6	WE&T	Connections	Complete baseline study to determine the current number of partnerships. (Y/N)	a		Y - Completed in 2010												
WET-7	WE&T	Connections	Number of high school continuing education outreach partnerships in WET Connection	a		16			3			2			1			

Footnote #	Footnote
1	"HTR" is as defined in the EE Policy Manual
2	Data sources for reporting will come from (a) program tracking databases and (b) process evaluation to refine estimates. – An audit completed in one portfolio may have measures implemented over several years and portfolios.
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 http://www.energy.ca.gov/HERS/index.html
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)

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	0.58%	0.00%	0.00%
% Hard to Reach	0.22%	1.38%	3.57%
% in NRA	0.33%	1.22%	1.45%
% in Deemed	0.21%	0.33%	1.01%
% in Calculated	0.04%	0.25%	0.88%
% in CEI	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%
TOTAL	**224,306**	**1,146**	**0.51%**	**80,107**	**284**	**0.35%**

Commercial Customers by NAICS Code									
NRA			DEEMED			CALCULATED			CEI	
NAICS3		#	NAICS3		#	NAICS3		#	NAICS3	#
423	Merchant Wholesalers D	2	Missing		1	Missing		3		
424	Merchant Wholesalers N	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 Applianc	2	447	Gasoline Stations	1	541	Professional Scientific and T	1		
444	Building Material and Ga	2	452	General Merchandise Sto	9	611	Educational Services	17		
445	Food and Beverage Stor	15	493	Warehousing and Storag	1	621	Ambulatory Health Care Ser	3		

446	Health and Personal Car	3	519	Other Information Servic	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 F	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 Storag	1	621	Ambulatory Health Care	2	811	Repair and Maintenance	1			
511	Publishing Industries (ex	1	622	Hospitals	13	812	Personal and Laundry Servic	3			
512	Motion Picture and Sour	2	623	Nursing and Residential (	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 Spectato	2						
523	Securities Commodity C	1	713	Amusement Gambling ar	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 Human	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 ADMINISTRATIO	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

	NRA		DEEMED		CALCULATED		CEI	
CUST_SIZE	**#**	**%**	**#**	**%**	**#**	**%**	**#**	**%**
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

	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

NRA		DEEMED		CALCULATED		CEI	
NAICS3	**#**	**NAICS3**	**#**	**NAICS3**	**#**	**NAICS3**	**#**
211 Oil and Gas Extraction	2	213 Support Activities for Mi	1	212 Mining (except Oil and Gas)	1		
212 Mining (except Oil and G	2	311 Food Manufacturing	31	221 Utilities	1		
221 Utilities	5	312 Beverage and Tobacco P	7	311 Food Manufacturing	16		
236 Construction of Building	3	313 Textile Mills	9	312 Beverage and Tobacco Prod	1		
311 Food Manufacturing	74	314 Textile Product Mills	1	313 Textile Mills	8		
312 Beverage and Tobacco P	10	315 Apparel Manufacturing	2	314 Textile Product Mills	1		
313 Textile Mills	33	321 Wood Product Manufact	1	322 Paper Manufacturing	3		
314 Textile Product Mills	2	322 Paper Manufacturing	5	323 Printing and Related Suppor	1		
321 Wood Product Manufac	1	324 Petroleum and Coal Proc	8	324 Petroleum and Coal Product	8		
322 Paper Manufacturing	15	325 Chemical Manufacturing	13	325 Chemical Manufacturing	5		
323 Printing and Related Sup	2	327 Nonmetallic Mineral Pro	1	326 Plastics and Rubber Product	3		
324 Petroleum and Coal Proc	5	332 Fabricated Metal Produc	3	327 Nonmetallic Mineral Produc	2		
325 Chemical Manufacturing	31	333 Machinery Manufacturin	1	331 Primary Metal Manufacturi	4		
326 Plastics and Rubber Proc	20	334 Computer and Electronic	1	332 Fabricated Metal Product M	5		
327 Nonmetallic Mineral Pro	4	336 Transportation Equipme	3	333 Machinery Manufacturing	1		
331 Primary Metal Manufact	27			334 Computer and Electronic Pr	3		
332 Fabricated Metal Produc	42			336 Transportation Equipment M	1		
333 Machinery Manufacturi	7			339 Miscellaneous Manufacturi	3		

334 Computer and Electronic	9						
335 Electrical Equipment Ap	2						
336 Transportation Equipme	10						
337 Furniture and Related Pr	4						
339 Miscellaneous Manufact	10						
	320		87		67		
				Total Industrial	474		

Industrial Customers by Size								
	NRA		DEEMED		CALCULATED		CEI	
CUST_SIZE	#	%	#	%	#	%	#	%
SMALL	104	0.40%	38	0.14%	18	0.07%	0	0.00%
LARGE	216	0.82%	49	0.19%	49	0.19%	0	0.00%
Total	320	1.22%	87	0.33%	67	0.25%	0	0.00%

Notes: Customer Size: LARGE - >50k therms/yr
Customer Size: SMALL - <50k therms/yr

Industrial Hard-to-Reach Customers								
	NRA		Deemed		Calculated		CEI	
	#	%	#	%	#	%	#	%
Hard-to-Reach Customers	80	0.30%	28	0.11%	23	0.09%	0	0.00%

Agricultural Customers by NAICS Code							
NRA		DEEMED		CALCULATED		CEI	
NAICS3	#	NAICS3	#	NAICS3	#	NAICS3	#
111 Crop Production	15	111 Crop Production	14	111 Crop Production	13		
115 Support Activities for Ag	8	112 Animal Production	1	115 Support Activities for Agricu	1		
		115 Support Activities for Ag	1				
	23		16		14		

				Total Agricultural	53		

Agricultural Customers by Size								
	NRA		DEEMED		CALCULATED		CEI	
CUST_SIZE	#	%	#	%	#	%	#	%
SMALL	7	0.44%	3	0.19%	9	0.57%	0	0.00%
LARGE	16	1.01%	13	0.82%	5	0.32%	0	0.00%
Total	23	1.45%	16	1.01%	14	0.88%	0	0.00%

Notes: Customer Size: LARGE - >50k therms/yr
Customer Size: SMALL - <50k therms/yr

Agricultural Hard-to-Reach Customers								
	NRA		Deemed		Calculated		CEI	
	#	%	#	%	#	%	#	%
Hard-to-Reach Customers	7	0.44%	5	0.32%	9	0.57%	0	0.00%

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												
Actual - Completed												
Statewide HVAC QM Program Design Development												
Actual - Completed												
Statewide HVAC QM Testing & Feasibility Activity (Field Study)												
Actual - Completed												
Statewide HVAC QM Project Design Evaluation												
Actual - Completed												
Statewide HVAC QM Phase II Planning												
Actual - Completed												

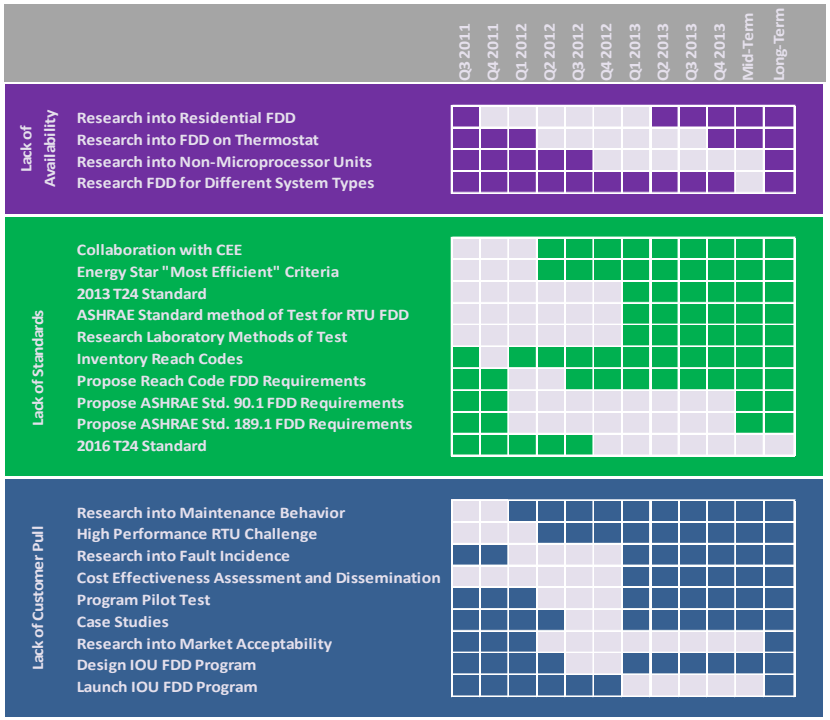
KEY	
Plan	
Actual	

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).**

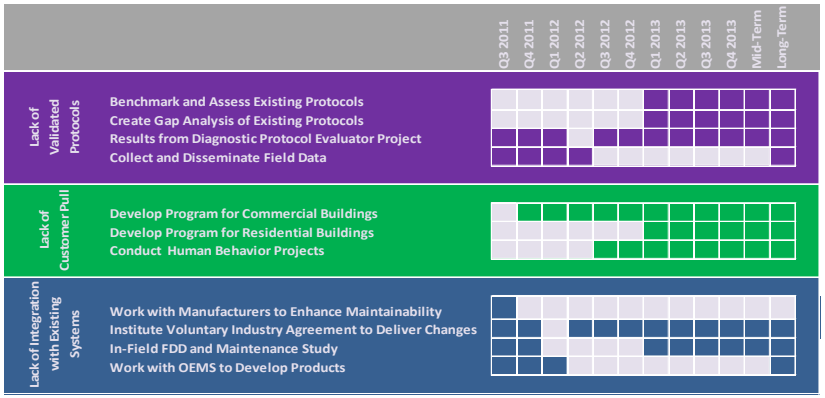
Statewide Table - HVAC Technology & Systems Diagnostics Plan to Support Development of National Standard Diagnostic Protocol

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												

WE&T Needs Assessment and WE&T PIP - Draw attention to the dominance of sub-standard installation and maintenance in California.												
Actual - In Progress												
WE&T Needs Assessment and WE&T PIP - Contractor/Owner: Address WE&T for proper QI/QM methods (system sizing, installation, air distribution and owner documentation).												
Actual - In Progress												
WE&T Needs Assessment and WE&T PIP - Contractor/Owner: Address needs of the business owner, by clearly communicating the value proposition of managing their operations with a quality and energy efficiency focus.												
Actual - In Progress												
WE&T Needs Assessment and WE&T PIP - Technician: Address proper QI/QM methods by supporting and collaborating with training opportunities available through industry associations, labor unions, online educators, state and/or national certification programs.												
Actual - In Progress												
WE&T Needs Assessment and WE&T PIP - Apprentice/Installer: Offer training for new technicians entering the industry by developing and supporting consistent QI certification programs offered through existing trade associations, trade unions, and national training organizations												
Actual - In Progress												
WE&T Needs Assessment and WE&T PIP - Salespeople: Work with existing HVAC industry sales and marketing experts to develop and add new modules to their own already credible and trusted training, in order to help California contractors better articulate and promote the benefits of higher levels of service to their prospects and existing clients.												
Actual - In Progress												
WE&T Needs Assessment and WE&T PIP - Students: Partner with HVAC educators and the industry to address technician shortages by promoting a viable career path, and partner with colleges and technical schools to offer the QI/QM and energy efficiency training required to provide the industry with a qualified labor pool.												
Actual - In Progress												

WE&T Needs Assessment and WE&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.												
Actual - In Progress												