

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

Application of Southern California Gas  
Company (U-904-G) for Approval of  
Natural Gas Energy Efficiency Programs  
and Budgets for Years 2006 through 2008.

Application 05-06-\_\_\_\_

**APPLICATION OF SOUTHERN CALIFORNIA GAS COMPANY**

**VICKI L. THOMPSON**  
**Senior Counsel**  
**Sempra Energy**  
**101 Ash Street**  
**San Diego, California 92101**  
**(619) 699-5130 Phone**  
**(619) 699-5027 Fax**  
**vthompson@sempra.com**

**Attorney for:**  
**SOUTHERN CALIFORNIA GAS COMPANY**

**June 1, 2005**

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Sempra Energy  
101 Ash Street  
San Diego, California 92101  
(619) 699-5130 Phone  
(619) 699-5027 Fax  
vthompson@sempra.com

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Application 05-06-\_\_\_\_

**APPLICATION OF SOUTHERN CALIFORNIA GAS COMPANY**

In accordance with Rules 23 and 24 of the California Public Utilities' Commission's ("Commission or CPUC") Rules of Practice and Procedure and Ordering Paragraph 3 of Commission Decision ("D.") 05-01-056, Southern California Gas Company ("SoCalGas") submits this Application for approval of a portfolio of energy efficiency ("EE") programs and related budgets for years 2006 through 2008 (the "Application").

As discussed in greater detail below and in the testimony attached hereto, the Application seeks Commission authority to: 1) implement a variety of gas and electric energy efficiency programs; 2) expend the associated program budgets necessary to implement those programs; and, 3) revise how SoCalGas allocates its gas and electric EE costs between customer classes.

**I.  
BACKGROUND**

The Energy Action Plan ("EAP"), adopted by the Commission, California Energy Commission ("CEC") and the California Consumer Power and Conservation Financing authority ("CPA"), identifies six actions that are of critical importance in managing California's growing energy consumption. The EAP puts energy efficiency at the forefront of energy policy and

resource procurement in California. The Commission, in Decisions 04-09-060 and 05-01-055, translates EAP's action item on energy efficiency into concrete steps for utilities to implement in order to achieve the EAP's energy policies. D.04-09-060 mandated specific energy savings and demand reduction goals for the years 2006 through 2013, which will be updated every three years for use in subsequent program cycles.

On January 27, 2005, the Commission issued D.05-01-055, the Interim Opinion on the Administrative Structure for Energy Efficiency: Threshold Issues. Of significance here, D.05-01-055 returned Investor Owned Utilities ("IOUs") to the lead role for post-2005 energy efficiency program choice and portfolio management. The decision directed IOUs to file applications on June 1, 2005 for Commission approval of energy efficiency program plans and funding levels for a three-year program implementation and funding cycle beginning January 1, 2006.

SoCalGas' 2006-2008 portfolio proposed in this Application is the product of a coordinated and collaborative effort between SoCalGas, its Program Advisory Group ("PAG"), and members of the public with one main focus: achieving the aggressive energy savings and demand reductions mandated in D.04-09-060.

## **II. SUMMARY OF APPLICATION**

The Application is supported by four SoCalGas witnesses: Patricia Wagner, Director, Customer Programs; Athena Besa, Energy Efficiency Administration and Policy Manager; Frank Spasaro, Marketing Strategy Manager; and, Yu Kai Chen, Economic Advisor. The witnesses' prepared direct testimony are attached hereto, incorporated in the Application by reference, and summarized below. Also attached to this Application (at Appendix E) is the Peer Review



Group's ("PRG") assessment of SoCalGas' overall portfolio plans including its competitive bidding process.

**A. Policy (Chapter I)**

SoCalGas witness Patricia Wagner describes SoCalGas' underlying policy behind the company's proposed Energy Efficiency programs. Ms. Wagner emphasizes SoCalGas' strong support of the EAP and belief that an integrated approach toward planning for the future energy needs of its customers will best meet the EAP's aggressive goals.

**B. EE Proposals and Budgets (Chapter II)**

The testimony of witness Athena Besa describes SoCalGas' proposed EE initiatives in detail including the budgets necessary to accomplish the programs' goals. Ms. Besa also provides the technical basis and explanation in support of the energy savings and demand reduction estimates presented in the portfolio.

**C. On-Bill Financing (Chapter III)**

SoCalGas witness Frank Spasaro addresses SoCalGas' proposal to institute an on-bill financing option for purchasing and installing energy efficiency measures.

**D. Gas Cost Allocation (Chapter IV)**

This Chapter, sponsored by witness Yu Kai Chen proposes updated cost allocation factors for SoCalGas to recover EE gas program costs.

**III.  
RATE AND REVENUE IMPACTS**

The proposed gas energy efficiency program budgets in 2006-08 will increase from the current budget of approximately \$27.0 million to \$47.9 million; \$61.1 million; and \$73.5 million, respectively. The gas program budgets and funding proposal for years 2006-2008 are described

in further detail in the testimony of witness Athena Besa. Average gas rates by customer class will increase by 0.4 to 3.1 cents per therm over the three year program period as rates are set to reflect the targeted program expenditures to each customer class.

Gas rate impacts resulting from the proposed energy efficiency programs budgets and a new cost allocation methodology are presented in the testimony of witness Chen and in Section IV(E) below.

#### **IV. STATUTORY AND PROCEDURAL REQUIREMENTS**

##### **A. Scoping Issues – Rule 6**

Commission rule 6(a)(1) requires SoCalGas to state in this application “the proposed category for the proceeding, the need for hearing, the issues to be considered, proposed schedule.” SoCalGas proposes to categorize this application as a rate-setting. The issues to be considered are described in this Application and the accompanying testimony.

SoCalGas does not believe hearings will be necessary and supports the schedule set forth in the ALJ ruling, dated May 23, 2005.<sup>1</sup>

##### **B. Legal Name and Correspondence - Rules 15(a) and 15(b)**

Southern California Gas Company is a public utility organized and existing under the laws of the State of California. SoCalGas is engaged in the business of providing gas service in a portion of Los Angeles County. SoCalGas' place of business and mailing address is 555 W. Fifth Street, Los Angeles, CA 90013.

Correspondence or communications regarding this application should be addressed to:

Joy C. Yamagata

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<sup>1</sup> “Administrative Law Judge’s Ruling Regarding Scheduling Issues for June 1, 2005 Energy Efficiency Applications.

Regulatory Manager For:  
 Southern California Gas Company  
 8330 Century Park Court  
 San Diego, California 92123  
 Telephone: (858) 654-1755  
 Facsimile: (858) 654-1788  
 E-Mail: jyamagata@semprautilities.com

With a copy to:

Vicki L. Thompson  
 Attorney For:  
 Southern California Gas Company  
 101 Ash Street  
 San Diego CA 92101  
 Telephone: (619) 699-5130  
 Facsimile: (619) 699-5027  
 E-Mail: vthompson@Sempra.com

**C. Articles of Incorporation - Rule 16**

A certified copy of SoCalGas' Restated Articles of Incorporation was filed with the Commission on October 1, 1998, in connection with SoCalGas' Application No. 98-10-012 and is incorporated herein by reference.

**D. Financial Statement, Balance Sheet, and Income Statement - Rule 23(a)**

SoCalGas' Financial Statement and Balance Sheet as of March 31, 2005, and Income Statement for the period ended March 31, 2005, are attached to this application as Appendix A

**E. Present and Proposed Rates - Rule 23(b) and 23(c)**

Present and proposed PPP gas surcharge rate impacts utilizing SoCalGas' proposed cost allocation factors are included in the tables below.

2006 PPP Surcharge Rate Impact

| Customer Class | Non-CARE Customers |      |     | CARE Customers |      |     |
|----------------|--------------------|------|-----|----------------|------|-----|
|                | Current            | 2006 | % Δ | Current        | 2006 | % Δ |
|                | ¢/th               | ¢/th |     | ¢/th           | ¢/th |     |
| Core           |                    |      |     |                |      |     |

|                      |      |      |      |      |      |       |
|----------------------|------|------|------|------|------|-------|
| Residential          | 3.80 | 4.07 | 7%   | 2.00 | 2.27 | 13%   |
| Core C&I             | 3.44 | 4.49 | 31%  | 1.64 | 2.69 | 64%   |
| Gas Air Conditioning | 1.88 | 3.92 | 108% | 0.09 | 2.12 | 2386% |
| Gas Engines          | 2.11 | 3.76 | 78%  | n/a  | n/a  | n/a   |
| Non-core             |      |      |      |      |      |       |
| Non-core C&I         | 1.83 | 2.06 | 13%  | n/a  | n/a  | n/a   |

2007 PPP Surcharge Rate Impact

| Customer Class       | Non-CARE Customers |              |      | CARE Customers  |              |       |
|----------------------|--------------------|--------------|------|-----------------|--------------|-------|
|                      | Current<br>¢/th    | 2007<br>¢/th | % Δ  | Current<br>¢/th | 2007<br>¢/th | % Δ   |
| Core                 |                    |              |      |                 |              |       |
| Residential          | 3.80               | 4.27         | 12%  | 2.00            | 2.48         | 24%   |
| Core C&I             | 3.44               | 5.21         | 52%  | 1.64            | 3.41         | 108%  |
| Gas Air Conditioning | 1.88               | 4.49         | 139% | 0.09            | 2.70         | 3061% |
| Gas Engines          | 2.11               | 4.29         | 103% | n/a             | n/a          | n/a   |
| Non-core             |                    |              |      |                 |              |       |
| Non-core C&I         | 1.83               | 2.12         | 16%  | n/a             | n/a          | n/a   |

2008 PPP Surcharge Rate Impact

| Customer Class       | Non-CARE Customers |              |      | CARE Customers  |              |       |
|----------------------|--------------------|--------------|------|-----------------|--------------|-------|
|                      | Current<br>¢/th    | 2008<br>¢/th | % Δ  | Current<br>¢/th | 2008<br>¢/th | % Δ   |
| Core                 |                    |              |      |                 |              |       |
| Residential          | 3.80               | 4.47         | 17%  | 2.00            | 2.67         | 33%   |
| Core C&I             | 3.44               | 5.89         | 71%  | 1.64            | 4.09         | 149%  |
| Gas Air Conditioning | 1.88               | 5.03         | 167% | 0.09            | 3.23         | 3690% |
| Gas Engines          | 2.11               | 4.78         | 126% | n/a             | n/a          | n/a   |
| Non-core             |                    |              |      |                 |              |       |
| Non-core C&I         | 1.83               | 2.18         | 20%  | n/a             | n/a          | n/a   |

**F. Description of Property and Equipment - Rule 23(d)**

A general description of SoCalGas' property and equipment was previously filed with the Commission on May 31, 2004, in connection with SoCalGas' Application No. 04-05-008 and is incorporated herein by reference. A statement of account of the original cost and depreciation reserve attributable thereto is attached to this Application as Appendix B

**G. Summary of Earnings – Rule 23 (e) and (f)**

A summary of earnings is attached to this application as Appendix C.

**H. Depreciation - Rule 23(h)**

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

**I. Proxy Statement - Rule 23(i)**

A copy of SoCalGas' latest Proxy Statement was filed with the Commission on May 2, 2005, in connection with SoCalGas Application 05-05-004 and is incorporated herein by reference.

**J. Service of Notice - Rule 24**

SoCalGas will electronically serve a notice of availability of this Application and related Exhibits on all parties of record to Rulemaking ("R.") 01-08-028 and the State/Government agencies listed in Appendix D of this Application.

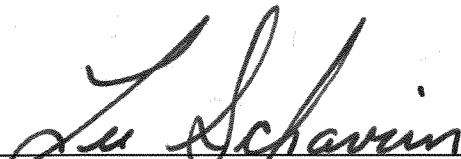
**V.  
CONCLUSION**

SoCalGas respectfully requests that the Commission issue an order:

1. Finding that SoCalGas' Energy Efficiency gas programs and related budgets and rates are reasonable;
2. Adopting SoCalGas' proposed reallocation methodology for gas Energy Efficiency costs; and,
3. Granting such addition relief as the Commission may deem proper.

Respectfully submitted this 1<sup>st</sup> day of June, 2005.

By: \_\_\_\_\_

  
Lee Schavrien

Vice President, Regulatory Affairs

\_\_\_\_\_  
  
Vicki L. Thompson

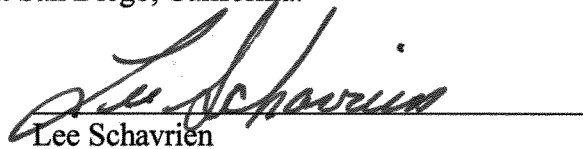
Attorney for

Southern California Gas Company

## VERIFICATION

I am an officer of the applicant corporation herein and am authorized to make this verification on its behalf. The content of this document is true, except as to matters that are stated on information and belief. As to those matters, I believe them to be true. I declare under penalty of perjury that the foregoing is true and correct.

Executed on June 1, 2005 at San Diego, California.

A handwritten signature in cursive script, appearing to read "Lee Schavrien", is written over a horizontal line.

Lee Schavrien

Vice President, Regulatory Affairs

**BEFORE THE PUBLIC UTILITIES COMMISSION  
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Application of Southern California Gas Company (U 904-G) for Approval of Energy Efficiency Programs and Budgets for Years 2006 through 2008.

Application 05-06-\_\_\_\_

**NOTICE OF AVAILABILITY OF APPLICATION  
OF SOUTHERN CALIFORNIA GAS COMPANY (U 904-G)**

The Application of Southern California Gas Company ("SoCalGas") for Approval of Electric and Natural Gas Energy Efficiency Programs and Budgets for Years 2006 through 2008 ("Application") filed with the California Public Utilities Commission (the "Commission") on June 1, 2005, is available to all interested parties and to the public. Consistent with Rule 2.3(c) of the Commission's Rules of Practice and Procedure, SDG&E is issuing this Notice of Availability of the above-referenced application. Because the **APPLICATION OF SOUTHERN CALIFORNIA GAS COMPANY (U 904-G)** and its related attachments exceed 75 pages in length, this Notice of Availability is being served on all parties in R.01-08-028. Any recipient of this Notice of Availability may request a copy of the above document.

A copy of the above document will be provided immediately upon the request of the party receiving this notice. All requests should be directed to:

Central Files  
E-mail: [Centralfiles@semprautilities.com](mailto:Centralfiles@semprautilities.com)  
Facsimile: 858-654-1789  
Phone: 858-654-1766

Vicki L. Thompson  
Attorney for San Diego Gas & Electric Company  
101 Ash Street  
San Diego, CA 92101  
Phone: (619) 699-5130  
Facsimile: (619) 699-5027



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Application 05-06-\_\_\_\_

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OF SOUTHERN CALIFORNIA GAS COMPANY (U 904-G)**

**Vicki L. Thompson  
Attorney  
Sempra Energy  
101 Ash Street  
San Diego, California 92101  
(619) 699-5130 Phone  
(619) 699-5027 Fax  
vthompson@sempra.com**

**Attorney for:  
SOUTHERN CALIFORNIA GAS COMPANY**

**June 1, 2005**

An electronic version of the above document can also be found at URL:

<http://www.socalgas.com/regulatory/cpuc.shtml>

Dated at San Diego, California this 1st day of June, 2005.

Respectfully Submitted,

By: 

Vicki L. Thompson

Attorney for  
SOUTHERN CALIFORNIA GAS COMPANY  
101 Ash Street  
San Diego, California 92101-3017  
Telephone: (619) 699-5130  
Facsimile: (619) 699-5027  
[vthompson@sempra.com](mailto:vthompson@sempra.com)

**CERTIFICATE OF SERVICE**

I hereby certify that I have this day served electronically a **NOTICE OF AVAILABILITY OF APPLICATION OF SOCALGAS (U-904-G)**, to all interested parties of record in Rulemaking 01-08-028.

Dated at San Diego, California, this 1st day of June 2005.

  
Lisa Fucci-Ortiz

# CALIFORNIA PUBLIC UTILITIES COMMISSION

## Service Lists

**Proceeding: R0108028 - PUC - RULEMAKING POL**

**Filer: CPUC - ENERGY**

**List Name: NEW LIST**

**Last changed: May 31, 2005**

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## Appearance

EMRE SCHVEIGHOFFER  
NATIONAL RESOURCE MANAGEMENT  
61 ENDICOTT STREET, BLDG. 32  
NORWOOD, MA 02062

DONALD GILLIGAN  
PREDICATE LLC  
1 POST OFFICE SQUARE  
SHARON, MA 02067

STEVE FAUST  
ENSAVE ENERGY PERFORMANCE, INC.  
65 MILLET STREET, SUITE 105  
RICHMOND, VT 05477

MICHAEL J. WICKENDEN  
CONTACT ADMINISTRATOR  
VERMONT ENERGY EFFICIENCY UTILITY  
446 TENNEY HILL ROAD  
HYDE PARK, VT 05655

BRUCE J. WALL  
VP-RESOURCE EFFICIENCY PROGRAMS  
ARCA, INC.  
489 JOBS ROAD  
WALLINGFORD, CT 06492

RICHARD ESTEVES  
SESCO, INC.  
77 YACHT CLUB DRIVE, SUITE 1000  
LAKE HOPATCONG, NJ 07849-1313

STEVE HASTIE  
NAVIGANT CONSULTING, INC.  
1717 ARCH STREET  
PHILADELPHIA, PA 19103

MERRILEE HARRIGAN  
ALLIANCE TO SAVE ENERGY  
SUITE 900  
1200 18TH STREET, NW  
WASHINGTON, DC 20036

WENDELL SEAY  
SEAY LIGHTING ASSOCIATERS  
2511 FARRIER LANE

WAEEL EL-SHARIF  
EXECUTIVE DIRECTOR  
GEOTHERMAL HEAT PUMP CONSORTIUM, INC.

RESTON, VA 20191

6700 ALEXANDER BELL DRIVE, SUITE 120  
COLUMBIA, MD 21046

JULIE WHITE  
WHIRLPOOL CORPORATION  
2000 M63 MD 3005  
BENTON HARBOR, MI 49022

JAMES STAPLES  
STAPLES MARKETING COMMUNICATIONS, INC.  
14665 W. LISBON ROAD  
BROOKFIELD, WI 53005

RACHEL HOLMES  
ARCA, INC.  
7400 EXCELSIOR BLVD.  
MINNEAPOLIS, MN 55426

JACK CAMERON  
PRESIDENT  
ARCA, INC  
7400 EXCELSIOR BLVD  
MINNEAPOLIS, MN 55426-4517

JAMES ROSS  
RCS, INC.  
500 CHESTERFIELD CENTER, SUITE 320  
CHESTERFIELD, MO 63017

PATTY MILLS  
TEDCO ENERGY SERVICE  
1830 N WESTERN ST UNIT B  
AMARILLO, TX 79124-1754

LISA A. SKUMATZ  
SKUMTZ ECONOMICS (SERA)  
762 ELDORADO DRIVE  
SUPERIOR, CO 80027

PETER C. JACOBS P.E.  
SENIOR ENGINEER  
ARCHITECTURAL ENERGY CORPORATION  
2540 FONTIER AVENUE, SUITE 201  
BOULDER, CO 80301

DAVE MUNK  
PROGRAM MANAGER  
RESOURCE ACTION PROGRAM  
2724 UPPER CATTLE CREEK ROAD  
CARBONDALE, CO 81623

CYNTHIA MITCHELL  
ECONOMIC CONSULTING INC.  
530 COLGATE COURT  
RENO, NV 89503

PATRICIA WATTS  
FCI MANAGEMENT CONSULTANTS  
5900 S EASTERN AVE., SUITE 152  
COMMERCE, CA 90040

DAVID L. HUARD  
ATTORNEY AT LAW  
MANATT, PHELPS & PHILLIPS, LLP  
11355 WEST OLYMPIC BOULEVARD  
LOS ANGELES, CA 90064

RANDALL W. KEEN  
ATTORNEY AT LAW  
MANATT PHELPS & PHILLIPS, LLP  
11355 WEST OLYMPIC BLVD.  
LOS ANGELES, CA 90064

MAUREEN ERBEZNIK  
PROGRAM MANAGER  
CALIF. URBAN WATER CONSERVATION COUNCIL  
4246 MICHAEL AVENUE  
LOS ANGELES, CA 90066

SAM HITZ  
MIKE MCCORMICK  
CALIFORNIA CLIMATE ACTION REGISTRY  
515 S. FLOWER STREET, STE 1305  
LOS ANGELES, CA 90071

DINA LANE  
CA MANUFACTURING TECHNOLOGY CENTER  
1149 WEST 190TH STREET, STE.2014  
GARDENA, CA 90248-4334

ED BERLEN  
ENERGY INNOVATION GROUP, LLC  
4267 MARINA CITY DRIVE, SUITE 104  
MARINA DEL REY, CA 90292

SUSAN MUNVES  
CITY OF SANTA MONICA  
1918 MAIN STREET  
SANTA MONICA, CA 90405

TIM KRAUSE  
ENERGX CONTROLS INC.  
PO BOX 519  
CYPRESS, CA 90630

JOHN FIELDS  
ORGANIZATIONAL SUPPORT SERVICES  
1850 REDONDO AVE., SUITE 102  
SIGNAL HILL, CA 90755-1254

WALLIS J. WINEGAR  
WINEGARD ENERGY, INC  
1818 FLOWER AVE  
DUARTE, CA 91010

TOM HAMILTON  
CHEERS  
9400 TOPANGA CANYON BLVD., SUITE 220  
CHATSWORTH, CA 91311

LESLIE NARDONI  
ICF CONSULTING  
14724 VENTURA BLVD. STE 1001  
SHERMAN OAKS, CA 91403

MICHAEL GIBBS  
ICF CONSULTING  
14724 VENTURA BLVD.  
SHERMAN OAKS, CA 91403

ALLAN RAGO  
QUALITY CONSERVATION SERVICES, INC.  
415 W FOOTHILL BLVD STE 202  
CLAREMONT, CA 91711-2780

BASU MUKHERJEE, P.E.  
GLOBAL ENERGY SERVICES, INC.  
1774 CLIFFBRANCH DRIVE  
DIAMOND BAR, CA 91765

DON ARAMBULA  
SOUTHERN CALIFORNIA EDISON  
2131 WALNUT GROVE, 3/F, MS B10  
ROSEMEAD, CA 91770

GENE RODRIGUES  
ATTORNEY AT LAW  
SOUTHERN CALIFORNIA EDISON COMPANY  
2244 WALNUT GROVE AVENUE  
ROSEMEAD, CA 91770

LAURA A. LARKS  
ATTORNEY AT LAW  
SOUTHERN CALIFORNIA EDISON COMPANY

MICHAEL D. MONTOYA  
ATTORNEY AT LAW  
SOUTHERN CALIFORNIA EDISON COMPANY

2244 WALNUT GROVE AVENUE, ROOM 345  
ROSEMEAD, CA 91770

2244 WALNUT GROVE AVENUE  
ROSEMEAD, CA 91770

KEITH SWITZER  
SOUTHERN CALIFORNIA WATER COMPANY  
630 EAST FOOTHILL BOULEVARD  
SAN DIMAS, CA 91773

A. Y. AHMED  
OCCIDENTAL ANALYTICAL GROUP  
1313 N GRAND AVENUE, STE 392  
WALNUT, CA 91789

JOY C. YAMAGATA  
SOUTHERN CALIFORNIA GAS  
SAN DIEGO GAS & ELECTRIC COMPANY  
8330 CENTURY PARK COURT  
SAN DIEGO, CA 91910

RICHARD SPERBERG  
PRESIDENT  
ONSITE ENERGY CORPORATION  
2701 LOKER AVE W 107  
CARLSBAD, CA 92008-6637

DALE R. FOSTER  
TETRA TECH EM INC.  
1230 COLUMBIA STREET, SUITE 1000  
SAN DIEGO, CA 92101

GEORGETTA J. BAKER  
ATTORNEY AT LAW  
SAN DIEGO GAS & ELECTRIC COMPANY  
101 ASH STREET, HQ13  
SAN DIEGO, CA 92101

GEORGETTA J. BAKER  
SEMPRA ENERGY  
101 ASH STREET, HQ 13  
SAN DIEGO, CA 92101

VICKI L. THOMPSON  
ATTORNEY AT LAW  
SAN DIEGO GAS & ELECTRIC COMPANY  
101 ASH STREET, HQ-13  
SAN DIEGO, CA 92101

VICKI L. THOMPSON  
ATTORNEY AT LAW  
SEMPRA ENERGY  
101 ASH STREET HQ13  
SAN DIEGO, CA 92101

JOHN LAUN  
APOGEE INTERACTIVE, INC.  
1220 ROSECRANS ST., SUITE 308  
SAN DIEGO, CA 92106

KEN MOSS  
POWER LOGIC  
4558 BRIGHTON AVENUE  
SAN DIEGO, CA 92107

SHERRI PETRO  
PRINCIPAL  
VPI STRATEFIES  
8305 VICKERS ST., SUITE 100  
SAN DIEGO, CA 92111

FRED HOYER  
SOUTHWEST ENVIRONMENTAL INC.  
9665 CHESAPEAKE DRIVE, SUITE 435A  
SAN DIEGO, CA 92123

IRENE M. STILLINGS  
SAN DIEGO REGIONAL ENERGY OFFICE  
8520 TECH WAY, SUITE 110  
SAN DIEGO, CA 92123

SCOTT J. ANDERS  
DIRECTOR OF POLICY AND PLANNING  
SAN DIEGO REGIONAL ENERGY OFFICE  
8520 TECH WAY - SUITE 110  
SAN DIEGO, CA 92123

JOSE C. CERVANTES  
CITY OF SAN DIEGO  
9601 RIDGEHAVEN CT., SUITE 120  
SAN DIEGO, CA 92123-1636

MARY VALERIO  
ENERGY CONSERVATION AND MANAGEMENT  
CITY OF SAN DIEGO  
9601 RIDGEHAVEN CT., STE. 120, MS 1101B  
SAN DIEGO, CA 92123-1636

NEIL MILLER  
CEO  
AMERICAN LIGHTING  
7754 ARJONS DRIVE  
SAN DIEGO, CA 92126

KURT J. KAMMERER  
K. J. KAMMERER & ASSOCIATES  
PO BOX 60738  
SAN DIEGO, CA 92166-8738

KIM SIMPSON  
VICE PRESIDENT  
ENERGY ANALYSIS TECHNOLOGIES  
12905 GORHAM STREET  
MORENO VALLEY, CA 92553

MIKE MILLER  
PRESIDENT  
BOTTOM LINE UTILITY SOLUTIONS, INC.  
3972 BARRANCA PARKWAY, SUITE J  
IRVINE, CA 92606

STEVE DORMAN  
BOTTOM LINE UTILITY SOLUTIONS, INC.  
3972 BARRANCA PARKWAY, SUITE J  
IRVINE, CA 92606

JAMES CRAFT  
RESOURCE MANAGEMENT CORPORATION  
4581 GREEN TREE LANE  
IRVINE, CA 92612

ROBERT BELHUMEUR  
CORPORATE SYSTEMS ENGINEERING  
24946 DANA FIR  
DANA POINT, CA 92629

TED FLANIGAN  
MANAGING DIRECTOR  
THE ENERGY COALITION  
1540 SOUTH COAST HIGHWAY, SUITE 204  
LAGUNA BEACH, CA 92651

CHARLES R. TOCA  
UTILITY SAVINGS AND REFUND, LLC  
1100 QUAIL STREET, SUITE 217  
NEWPORT BEACH, CA 92660

DALE A. GUSTAVSON  
GENERAL MANAGER  
BETTER BUILDINGS INTERACTIVE, LLC.  
31 E MACARTHUR CRES APT B314  
SANTA ANA, CA 92707-5936

DAVID M. WYLIE, PE  
ASW ENGINEERING  
2512 CHAMBERS ROAD, SUITE 103  
TUSTIN, CA 92780

DARRYL MENDIVIL  
CALIFORNIA INFRARED INSPECTION COMPANY  
1346 ALDER ST.,

PETER CANESSA  
CALIFORNIA STATE UNIVERSITY  
FRESNO FOUNDATION



SAN LUIS OBISPO, CA 93401

665 ASILO  
ARROYO GRANDE, CA 93420

ART BRICE  
RICHARD HEATH AND ASSOCIATES, INC.  
590 W. LOCUST AVENUE, SUITE 103  
FRESNO, CA 93650

JOE WILLIAMS  
CEO  
RICHARD HEATH AND ASSOCIATES, INC.  
590 W. LOCUST AVENUE, STE 103  
FRESNO, CA 93650

KRISTINE LUCERO  
RICHARD HEATH AND ASSOCIATES, INC.  
590 W. LOCUST AVENUE, SUITE 103  
FRESNO, CA 93650

LAUREN CASENTINI  
D & R INTERNATIONAL  
711 MAIN STREET  
HALF MOON BAY, CA 94019

DIANE I. FELLMAN  
ATTORNEY AT LAW  
LAW OFFICES OF DIANE I. FELLMAN  
234 VAN NESS AVENUE  
SAN FRANCISCO, CA 94102

HAYLEY GOODSON  
ATTORNEY AT LAW  
THE UTILITY REFORM NETWORK  
711 VAN NESS AVENUE, SUITE 350  
SAN FRANCISCO, CA 94102

JEANNE SOLE  
DEPUTY CITY ATTORNEY  
CITY AND COUNTY OF SAN FRANCISCO  
1 DR. CARLTON B. GOODLETT PLACE, RM. 234  
SAN FRANCISCO, CA 94102

MARCEL HAWIGER  
ATTORNEY AT LAW  
THE UTILITY REFORM NETWORK  
711 VAN NESS AVENUE, SUITE 350  
SAN FRANCISCO, CA 94102

BRIAN C PRUSNEK  
CALIF PUBLIC UTILITIES COMMISSION  
EXECUTIVE DIVISION  
ROOM 5141  
505 VAN NESS AVENUE  
SAN FRANCISCO, CA 94102-3214

JAMES E. SCARFF  
CALIF PUBLIC UTILITIES COMMISSION  
LEGAL DIVISION  
ROOM 5121  
505 VAN NESS AVENUE  
SAN FRANCISCO, CA 94102-3214

CLARE BRESSANI TANKO  
ENERGY EFFICIENCY PROGRAM MANAGER  
ENERGY ACTION/LOCAL INITIATIVES SUPPORT  
369 PINE STREET, SUITE 350  
SAN FRANCISCO, CA 94104

DEVRA BACHRACH  
STAFF SCIENTIST  
NATURAL RESOURCES DEFENSE COUNCIL  
111 SUTTER STREET, 20TH FLOOR  
SAN FRANCISCO, CA 94104

EVELYN KAHL  
ATTORNEY AT LAW  
ALCANTAR & KAHL, LLP  
120 MONTGOMERY STREET, SUITE 2200  
SAN FRANCISCO, CA 94104

KAREN TERRANOVA  
ALCANTAR & KAHL, LLP  
120 MONTGOMERY STREET, STE 2200  
SAN FRANCISCO, CA 94104

NORA SHERIFF  
ATTORNEY AT LAW  
ALCANTAR & KAHL LLP  
120 MONTGOMERY STREET, SUITE 2200  
SAN FRANCISCO, CA 94104

SHERYL CARTER  
NATURAL RESOURCES DEFENSE COUNCIL  
111 SUTTER STREET, 20/F  
SAN FRANCISCO, CA 94104

PACIFIC GAS & ELECTRIC COMPANY  
77 BEALE STREET, MAILCODE 30B  
SAN FRANCISCO, CA 94105

CHRIS ANN DICKERSON, PHD.  
FREEMAN, SULLIVAN & CO.  
100 SPEAR ST., 17/F  
SAN FRANCISCO, CA 94105

JAY LUO  
PACIFIC GAS & ELECTRIC COMPANY  
77 BEALE STREET, MAILCODE 30B  
SAN FRANCISCO, CA 94105

ROB SHELTON  
1 MARKET STREET  
SPEAR ST. TRW., STE. 1200  
SAN FRANCISCO, CA 94105

EVELYN C. LEE  
ATTORNEY AT LAW  
PACIFIC GAS AND ELECTRIC COMPANY  
77 BEALE STREET, RM 3135  
SAN FRANCISCO, CA 94105-1814

TERRY M. FRY  
PRINCIPAL  
NEXANT, INC.  
101 SECOND STREET, 11TH FLOOR  
SAN FRANCISCO, CA 94105-3672

JEN MCGRAW  
CENTER FOR NEIGHBORHOOD TECHNOLOGY  
PO BOX 14322  
SAN FRANCISCO, CA 94114

LULU WEINZIMER  
CALIFORNIA ENERGY CIRCUIT  
695 9TH AVE. NO.2  
SAN FRANCISCO, CA 94118

MARGARET D. BROWN  
ATTORNEY AT LAW  
PACIFIC GAS AND ELECTRIC COMPANY  
PO BOX 7442  
SAN FRANCISCO, CA 94120-7442

NICOLE NASSER  
EFFICIENCY PARTNERSHIP  
2962 FILLMORE STREET  
SAN FRANCISCO, CA 94123

MAURICE CAMPBELL  
COMMUNITY FIRST COALITION  
C/O EJ ADVOCATES  
4909 THIRD STREET  
SAN FRANCISCO, CA 94124

CHRIS CHOUTEAU  
38 DARRELL PL.  
SAN FRANCISCO, CA 94133

BARBARA GEORGE  
WOMEN'S ENERGY MATTERS  
PO BOX 883723

RICHARD S. RIDGE  
RIDGE & ASSOCIATES  
3022 THOMPSON AVE.

SAN FRANCISCO, CA 94188-3723

ALAMEDA, CA 94501

MICHAEL ROCHMAN  
SCHOOL PROJECT UTILITY RATE REDUCTION  
1430 WILLOW PASS ROAD, SUITE 240  
CONCORD, CA 94520

STEVEN R. SHALLENBERGER  
AMERICAN SYNERGY CORPORATION  
28436 SATTELITE STREET  
HAYWARD, CA 94545

JOHN KOTOWSKI  
GLOBAL ENERGY PARTNERS  
3569 MT. DIABLO BLVD., STE 200  
LAFAYETTE, CA 94549

JANET L. OPPIO  
SHELL OIL PRODUCTS U.S.  
3485 PACHECO BLVD.  
MARTINEZ, CA 94553

JAY BHALLA  
INTERGY CORPORATION  
221 AZALEA LANE, SUITE F  
SAN RAMON, CA 94583

JUDY NICKEL  
FISHER-NICKEL, INC.  
FOOD SERVICE TECHNOLOGY CENTER  
12949 ALCOSTA BLVD., SUITE 101  
SAN RAMON, CA 94583

GREG TRAYNOR  
PROJECT MANAGER  
T. MARSHALL ASSOCIATES, LTD.  
7074 COMMERCE CIRCLE, UNIT D  
PLEASANTON, CA 94588

MARY SUTTER  
EQUIPOISE CONSULTING INC.  
4309 WHITTLE AVE.  
OAKLAND, CA 94602

TED POPE  
DIRECTOR  
COHEN VENTURES, INC./ENERGY SOLUTIONS  
1738 EXCELSIOR AVENUE  
OAKLAND, CA 94602

ERIC C. WOYCHIK  
STRATEGY INTEGRATION LLC  
9901 CALODEN LANE  
OAKLAND, CA 94605

JULIA K. LARKIN  
KEMA-XENERGY  
492 NINTH STREET, SUITE 220  
OAKLAND, CA 94607

RICHARD S. BARNES  
SR. VICE PRESIDENT  
KEMA-XENERGY  
492 NINTH STREET, SUITE 220  
OAKLAND, CA 94607

ROBERT L. KNIGHT  
BEVILACQUA-KNIGHT INC  
1000 BROADWAY, SUITE 410  
OAKLAND, CA 94607

KARIN CORFEE  
SENIOR CONSULTANT  
KEMA-XENERGY  
492 NINTH STREET, SUITE 220  
OAKLAND, CA 94607-4048

PAUL FENN  
LOCAL POWER  
4281 PIEDMONT AVE.  
OAKLAND, CA 94611

STEVE SCHILLER  
NEXANT, INC.  
111 HILLSIDE  
PIEDMONT, CA 94611

BRUCE MAST  
FRONTIER ASSOCIATES LLC  
610 16TH ST., SUITE 412  
OAKLAND, CA 94612

EBEN TWOMBLY  
KW ENGINEERING  
360 - 17TH STREET, SUITE 100  
OAKLAND, CA 94612

ROBERT B. WEISENMILLER  
MRW & ASSOCIATES, INC.  
1999 HARRISON STREET, STE 1440  
OAKLAND, CA 94612-3517

SCOTT WENTWORTH  
ENERGY ENGINEER  
PUBLIC WORKS DEPARTMENT, CITY OF OAKLAND  
7101 EDGEWATER DRIVE  
OAKLAND, CA 94621-3001

CYNTHIA WOOTEN  
NAVIGANT CONSULTING, INC.  
1126 DELAWARE STREET  
BERKELEY, CA 94702

REED V. SCHMIDT  
BARTLE WELLS ASSOCIATES  
1889 ALCATRAZ AVENUE  
BERKELEY, CA 94703

RYAN BELL  
CITIES FOR CLIMATE PROTECTION  
15 SHATTUCK SQUARE, SUITE 215  
BERKELEY, CA 94703

EILEEN PARKER  
QUANTUM CONSULTING  
2030 ADDISON STREET  
BERKELEY, CA 94704

NEAL DE SNOO  
CITY OF BERKELEY  
2180 MILVIA STREET, 2ND FLOOR  
BERKELEY, CA 94704

PHIL KAMLARZ  
CITY OF BERKELEY  
2180 MILVIA STREET  
BERKELEY, CA 94704

CHRIS KING  
EXECUTIVE DIRECTOR  
AMERICAN ENERGY INSTITUTE  
842 OXFORD ST.  
BERKELEY, CA 94707

BILL F. ROBERTS  
ECONOMIC SCIENCES CORPORATION  
1516 LEROY AVENUE  
BERKELEY, CA 94708

CRAIG TYLER  
TYLER & ASSOCIATES  
2760 SHASTA ROAD

EDWARD VINE  
LAWRENCE BERKELEY NATIONAL LAB  
BUILDING 90-4000

BERKELEY, CA 94708

MARCIA W. BECK  
LAWRENCE BERKELEY NATIONAL LABORATORY  
MS 90-3026  
1 CYCLOTRON ROAD  
BERKELEY, CA 94720

PHILIP SISSON  
SISSON AND ASSOCIATES  
42 MOODY COURT  
SAN RAFAEL, CA 94901

SAM RUARK  
COUNTY OF MARIN CDA  
3501 CIVIC CENTER DRIVE, ROOM 308  
SAN RAFAEL, CA 94903

TIM ROSENFELD  
HMW INTERNATIONAL, INC.  
359 MOLINO AVENUE  
MILL VALLEY, CA 94941

RITA NORTON  
RITA NORTON AND ASSOCIATES, LLC  
18700 BLYTHSWOOD DRIVE,  
LOS GATOS, CA 95030

GENE THOMAS  
ECOLOGY ACTION  
333 FRONT STREET, SUITE 103  
SANTA CRUZ, CA 95060

HANK RYAN  
N. CALIFORNIA DIRECTOR  
CENTER FOR SMALL BUSINESS  
4315 BAIN AVENUE  
SANTA ROSA, CA 95062

BERKELEY, CA 94720

JOHN PROCTOR  
PROCTOR ENGINEERING GROUP  
418 MISSION AVE  
SAN RAFAEL, CA 94901

ANDEE CHAMBERLAIN  
STRATEGIC ENERGY INNOVATIONS  
185 N REDWOOD DRIVE, SUITE 188  
SAN RAFAEL, CA 94903

JOHN NIMMONS  
PRESIDENT  
JOHN NIMMONS & ASSOCIATES, INC.  
175 ELINOR AVE., SUITE G  
MILL VALLEY, CA 94941

THOMAS P. CONLON  
PRINCIPAL  
GEOPRAXIS, INC.  
205 KELLER STREET, SUITE 202  
PETALUMA, CA 94952-2886

PETER HOFMANN  
BO ENTERPRISES  
43 E MAIN ST B  
LOS GATOS, CA 95030-6907

MAHLON ALDRIDGE  
ECOLOGY ACTION, INC.  
PO BOX 1188  
SANTA CRUZ, CA 95061

JENNIFER HOLMES  
ITRON INC.  
153 WOODCREST PLACE  
SANTA CRUZ, CA 95065

JOSEPH P. LEUNG, P.E.  
CAPITAL PROJECTS MANAGER, III  
CAPITAL PROGRAMS, GSA  
701 MILLER STREET, 2ND FLOOR  
SAN JOSE, CA 95110-2121

MIKE HODGSON  
CONSOL  
7407 TAM OSHANTER DRIVE, SUITE 200  
STOCKTON, CA 95210

TERRY HUGHES  
CALIFORNIA LIVING & ENERGY  
3649 MITCHELL ROAD, SUITE C  
CERES, CA 95307

JIM STONE  
CITY OF MANTECA DEPARTMENT OF PUBLIC WOR  
1001 WEST CENTER STREET  
MANTECA, CA 95337

JOSEPH THRASHER  
PROGRAM DIRECTOR  
RESOURCE ACTION PROGRAMS  
2351 TENAYA DRIVE  
MODESTO, CA 95354

JP BATMALE  
RENEWABLE ENERGY PROGRAM MANAGER  
GREAT VALLEY CENTER  
201 NEEDHAM ST.  
MODESTO, CA 95354

GLYNNIS JONES  
APPLIANCE RECYCLING CENTERS OF AMERICA  
PO BOX 1045  
BOONVILLE, CA 95415

MATT BROST  
RLW ANALYTICS, INC  
1055 BROADWAY, SUITE G  
SONOMA, CA 95476

MAUREEN HART  
EXECUTIVE DIRECTOR  
REDWOOD COAST ENERGY AUTHORITY  
C/O HUMBLDT COUNTY BOARD OF SUPERVISORS  
825 FIFTH STREET, ROOM 111  
EUREKA, CA 95501

BILL KNOX  
CITY OF DAVIS  
509 4TH STREET, SUITE A  
DAVIS, CA 95616

MARK J. BERMAN  
DIRECTOR OF BUSINESS DEVELOPMENT  
DAVIS ENERGY GROUP  
123 C STREET  
DAVIS, CA 95616

MIKE GOODISON  
CITY OF DAVIS, PUBLIC WORKS  
23 RUSSELL BLVD  
DAVIS, CA 95616

BRIAN HEARD  
EXECUTIVE DIRECTOR  
AEEES  
PO BOX 598  
DAVIS, CA 95617

CAROLYN M. KEHREIN  
ENERGY MANAGEMENT SERVICES  
1505 DUNLAP COURT  
DIXON, CA 95620-4208

DOUGLAS E. MAHONE  
HESCHONG MAHONE GROUP  
11626 FAIR OAKS BLVD., 302

NEHEMIAH STONE  
HESCHONG MAHONE GROUP  
11626 FAIR OAKS BLVD. 302

FAIR OAKS, CA 95628

FAIR OAKS, CA 95628

LAURIE PARK  
NAVIGANT CONSULTING, INC.  
3100 ZINFANDEL DRIVE, SUITE 600  
RANCHO CORDOVA, CA 95670-6078

TOM CROOKS  
NAVIGANT CONSULTING, INC.  
3100 ZINFANDEL DRIVE, SUITE 600  
RANCHO CORDOVA, CA 95670-6078

VICTORIA P. FLEMING  
NAVIGANT CONSULTING, INC.  
3100 ZINFANDEL DRIVE, SUITE 600  
RANCHO CORDOVA, CA 95670-6078

ROBERT K. WEATHERWAX  
SIERRA ENERGY & RISK ASSESSMENT, INC  
8170 CHRISTIAN LANE  
GRANITE BAY, CA 95746-8118

DAVID REYNOLDS  
ASPEN SYSTEMS CORPORATION  
5802 BALFOR ROAD  
ROCKLIN, CA 95765

ANDREW B. BROWN  
ELLISON, SCHNEIDER & HARRIS, LLP  
2015 H STREET  
SACRAMENTO, CA 95814

ANN L. TROWBRIDGE  
ATTORNEY AT LAW  
DOWNEY BRAND LLP  
555 CAPITOL MALL, STE. 1050  
SACRAMENTO, CA 95814

G. PATRICK STONER  
LOCAL GOVERNMENT COMMISSION  
1414 K STREET, SUITE 600  
SACRAMENTO, CA 95814

JAN MCFARLAND  
CAL SEIA  
1100, 11TH STREET, STE. 322  
SACRAMENTO, CA 95814

JENNIFER CASTLEBERRY  
RUNYON SALTZMAN & EINHORN  
ONE CAPITOL MALL, SUITE 400  
SACRAMENTO, CA 95814

LYNN HAUG  
ATTORNEY AT LAW  
ELLISON, SCHNEIDER & HARRIS, LLP  
2015 H STREET  
SACRAMENTO, CA 95814-3109

BRUCE MATULICH  
EXECUTIVE DIRECTOR  
ELECTRIC & GAS INDUSTRIES ASSOCIATION  
3800 WATT AVE, SUITE 105  
SACRAMENTO, CA 95821

KIRK UHLER  
CHIEF OPERATING OFFICER  
ELECTRIC & GAS INDUSTRIES ASSOCIATION  
3800 WATT AVE., 105  
SACRAMENTO, CA 95821

DONALD DOHRMANN  
ADM ASSOCIATES, INC.  
3239 RAMOS CIRCLE  
SACRAMENTO, CA 95827-2501

KAREN NORENE MILLS  
ATTORNEY AT LAW  
CALIFORNIA FARM BUREAU FEDERATION  
2300 RIVER PLAZA DRIVE  
SACRAMENTO, CA 95833

ROBERT E. BURT  
4153 NORTHGATE BLVD., NO. 6  
SACRAMENTO, CA 95834

KAREN LINDH  
LINDH & ASSOCIATES  
7909 WALERGA ROAD, NO. 112, PMB 119  
ANTELOPE, CA 95843

JIM PARKS  
SACRAMENTO MUNICIPAL UTILITY DIST.  
6301 S STREET  
SACRAMENTO, CA 95852-1830

ROBERT MOWRIS  
ROBERT MOWRIS & ASSOCIATES  
PO BOX 2141  
OLYMPIC VALLEY, CA 96146-2141

BETTINA FOSTER  
SENIOR ASSOCIATE  
GLOBAL ENERGY PARTNERS, LLC  
77-350 AINANANI STREET  
KAILA-KONA, HI 96740

MICHAEL ALCANTAR  
ATTORNEY AT LAW  
ALCANTAR & KAHL LLP  
1300 SW FIFTH AVENUE, SUITE 1750  
PORTLAND, OR 97201

PHIL WELKER  
PORTLAND ENERGY CONSERVATION INC.  
1400 SW 5TH AVENUE, SUITE 700  
PORTLAND, OR 97201

LOREN LUTZENHISER  
LUTZENHISER ASSOCIATES  
7010 SE 36TH AVENUE  
PORTLAND, OR 97202

JOHN GRAHAM  
SENIOR PROGRAM MANAGER  
ECOS CONSULTING  
309 SW 6TH AVENUE, STE 1000  
PORTLAND, OR 97204

SAM SIRKIN  
PROGRAM DEVELOPMENT DIRECTOR  
ECOS CONSULTING  
309 SW 6TH AVENUE, STE 1000  
PORTLAND, OR 97204

BRIAN HEDMAN  
VICE PRESIDENT  
QUANTEC  
720 SW WASHINGTON STREET, STE 400  
PORTLAND, OR 97205

DANIEL W. MEEK  
ATTORNEY AT LAW  
RESCUE  
10949 S.W. 4TH AVENUE  
PORTLAND, OR 97219

JOHN MCLAIN  
EARTH ADVANTAGE NATIONAL CENTER  
PORTLAND GENERAL ELECTRIC  
16280 SW BOONES FERRY ROAD  
PORTLAND, OR 97224

BEN WILDMAN  
SBW CONSULTING, INC.  
2820 NORTHUP WAY, SUITE 230

THOMAS ECKHART  
CAL-UCONS  
10612 NE 46TH STREET



BELLEVUE, WA 98004-1419

KIRKLAND, WA 98033

MICHAEL SHEEHAN  
MICROPLANET LTD  
100 SOUTH KING STREET, SUITE 240  
SEATTLE, WA 98104

ROBERT D. BORDNER  
PRESIDENT  
ENERGY MARKET INNOVATIONS, INC.  
83 COLUMBIA STREET, SUITE 303  
SEATTLE, WA 98104

STEPHEN HALL  
11-5651 LACKNER CRESCENT  
RICHMOND, BC V7E 6E8  
CANADA

## Information Only

AMELIA GULKIS  
ENSAVE ENERGY PERFORMANCE, INC.  
65 MILLER STREET, SUITE 105  
RICHMOND, VT 05477

TAFF TSCHAMLER  
KEMA, INC.  
OFFICE PLAZA ONE  
10333 EAST DRY CREEK, SUITE 200  
ENGLEWOOD, CO 80112

MIKE MCCORMICK  
CALIFORNIA CLIMATE ACTION REGISTRY  
515 S FLOWER ST. 1305  
LOS ANGELES, CA 90071

MAGGIE HEALY  
CITY OF REDONDO BEACH  
415 DIAMOND ST.  
REDONDO BEACH, CA 90277

SIDNEY PELSTON  
ENERGY INNOVATION GROUP, LLC  
4267 MARINA CITY DRIVE, SUITE 104  
MARINA DEL REY, CA 90292

MARILYN LYON  
PROJECT COORDINATOR  
3858 CARSON STREET, SUITE 110  
TORRANCE, CA 90503

FEIT ELECTRIC  
4901 GREGG ROAD  
PICO RIVERA, CA 90660

MONTE WINEGAR  
PROJECT DIRECTOR  
WINEGARD ENERGY  
1818 FLOWER AVENUE  
DUARTE, CA 91010

JEANETTE MEYER  
MARKETING MANAGER  
BURBANK WATER AND POWER

TORY S. WEBER  
SOUTHERN CALIFORNIA EDISON COMPANY  
2131 WALNUT GROVE AVENUE

164 W. MAGNOLIA BLVD.  
BURBANK, CA 91502

ROSEMEAD, CA 91770

ELIZABETH HULL  
DEPUTY CITY ATTORNEY  
CITY OF CHULA VISTA  
276 FOURTH AVENUE  
CHULA VISTA, CA 91910

DON WOOD  
PACIFIC ENERGY POLICY CENTER  
4539 LEE AVENUE  
LA MESA, CA 91941

MARK MCNULTY  
5150 RANDLETT DRIVE  
LA MESA, CA 91941

DONALD C. LIDDELL P. C.  
DOUGLASS & LIDDELL  
2928 2ND AVENUE  
SAN DIEGO, CA 92103

ALAN BALL  
QUALCOMM INCORPORATED  
5775 MOREHOUSE DR  
SAN DIEGO, CA 92121

CENTRAL FILES  
SAN DIEGO GAS & ELECTRIC  
CP31-E  
8330 CENTURY PARK COURT  
SAN DIEGO, CA 92123-1530

MARK SHIRILAU  
ALOHA SYSTEMS, INC.  
14801 COMET STREET  
IRVINE, CA 92604-2464

JAMES L. MATARESE  
PROJECT ASSISTANT  
THE ENERGY COALITION  
15615 ALTON PKWY. STE. 245  
IRVINE, CA 92618

KENT G. ANDERSEN  
INYO MONO ADVOCATES FOR COMMUNITY ACTION  
224 S. MAIN ST.  
BISHOP, CA 93545

RICHARD KEYES  
PRINCIPAL  
KEYES SOLUTIONS  
6572 N. LEAD AVE  
FRESNO, CA 93711

CAL BROOMHEAD  
DEPT OF ENVIRONMENT, ENERGY SECTION  
CITY AND COUNTY OF SAN FRANCISCO  
11 GROVE STREET  
SAN FRANCISCO, CA 94102

JOE COMO  
ATTORNEY AT LAW  
CITY AND COUNTY OF SAN FRANCISCO  
ONE DR. CARLTON B. GOODLETT PLACE  
SAN FRANCISCO, CA 94102

DANIELLE DOWERS  
S. F. PUBLIC UTILITIES COMMISSION  
1155 MARKET STREET 4TH FLOOR  
SAN FRANCISCO, CA 94103

MICHAEL HYAMS  
SAN FRANCISCO PUBLIC UTILITIES COMM  
1155 MARKET ST., 4/F  
SAN FRANCISCO, CA 94103

PETER MILLER  
CONSULTANT  
NATURAL RESOURCES DEFENSE COUNCIL  
111 SUTTER STREET 20/F  
SAN FRANCISCO, CA 94104

ANNETTE S. BEITEL  
PACIFIC GAS AND ELECTRIC COMPANY  
245 MARKET STREET, MAIL CODE N6G  
SAN FRANCISCO, CA 94105

CHONDA NWAMU  
ATTORNEY AT LAW  
PACIFIC GAS AND ELECTRIC COMPANY  
77 BEALE STREET, B30A  
SAN FRANCISCO, CA 94105

LUO JAY  
PACIFIC GAS AND ELECTRIC COMPANY  
77 BEALE STREET, MAIL CODE B9A  
SAN FRANCISCO, CA 94105

MIKE WAN  
PACIFIC GAS AND ELECTRIC COMPANY  
245 MARKET STREET, MAIL CODE N6G  
SAN FRANCISCO, CA 94105

CALIFORNIA ENERGY MARKETS  
517-B POTRERO AVENUE  
SAN FRANCISCO, CA 94110

SUSAN E. BROWN  
LATINO ISSUES FORUM  
160 PINE STREET, SUITE 700  
SAN FRANCISCO, CA 94111

JUDY PAU  
DAVIS, WRIGHT TREMAINE LLP  
ONE EMBARCADERO CENTER, SUITE 600  
SAN FRANCISCO, CA 94111-3834

LAW DEPARTMENT FILE ROOM  
PACIFIC GAS AND ELECTRIC COMPANY  
PO BOX 7442  
SAN FRANCISCO, CA 94120-7442

JENNIFER BARNES  
PACIFIC GAS AND ELECTRIC COMPANY  
MAIL STOP N6G  
PO BOX 770000  
SAN FRANCISCO, CA 94177

JOSEPHINE WU  
PACIFIC GAS AND ELECTRIC COMPANY  
77 BEALE STREET, MAIL CODE B9A  
SAN FRANCISCO, CA 94177

FLOYD KENEIPP  
SUMMIT BLUE CONSULTING  
5433 CLAYTON ROAD SUITE K-342  
CLAYTON, CA 94517

MARK REEDY  
GLOBAL ENERGY PARTNERS, LLC  
3569 MT. DIABLO BLVD., SUITE 200  
LAFAYETTE, CA 94549

JODY S. LONDON  
PO BOX 3629  
OAKLAND, CA 94609

JOHN CAVALLI  
QUANTUM CONSULTING, INC.  
2001 ADDISON ST., STE, 300

DANIEL C. GLASER  
2727 STUART ST.  
BERKELEY, CA 94705

BERKELEY, CA 94704

MARIA SANDERS  
COMMUNITY ENERGY SERVICES CORPORATION  
1013 PARDEE ST.  
BERKELEY, CA 94710

RYAN WISER  
BERKELEY LAB  
MS-90-4000  
ONE CYCLOTRON ROAD  
BERKELEY, CA 94720

IRINA KRISHPINOVICH  
HEMSTREET ASSOCIATES  
5760 CLINTON AVENUE  
RICHMOND, CA 94805

PATTY AVERY  
GENERAL MANAGER  
PROCTOR ENGINEERING GROUP  
418 MISSION AVENUE  
SAN RAFAEL, CA 94901

ELIZABETH I. EELLS  
52 LOVEJOY WAY  
NOVATO, CA 94949-6240

KEN MOORE  
PROGRAM MANAGER  
SMALL BUSINESS ENERGY ALLIANCE  
1055 BROADWAY, SUITE G  
SONOMA, CA 95476

SAM PIERCE  
RLW ANALYTICS, INC.  
1055 BROADWAY, SUITE G  
SONOMA, CA 95476

MARSHALL B. HUNT  
VALLEY ENERGY EFFICEINCY CORP  
509 4TH STREET, SUITE A  
DAVIS, CA 95616

SARAH SPURR  
YOLO ENERGY EFFICIENCY PROJECT  
509 4TH STREET, SUITE A  
DAVIS, CA 95616

VIKKI WOOD  
PRINCIPAL DEMAND-SIDE SPECIALIST  
SACRAMENTO MUNICIPAL UTILITY DISTRICT  
6301 S STREET, MS A103  
SACRAMENTO, CA 95618-1899

LEGAL AND REGULATORY DEPARTMENT  
CALIFORNIA ISO  
151 BLUE RAVINE ROAD  
FOLSOM, CA 95630

KRYSTY EMERY  
NAVIGANT CONSULTING, INC.  
3100 ZINFANDEL DRIVE, SUITE 600  
RANCHO CORDOVA, CA 95670-6078

JOHN BERLIN  
NORTHERN CALIFORNIA POWER AGENCY  
180 CIRBY WAY  
ROSEVILLE, CA 95678

KARI DOHN  
GCC ROSE&KINDEL (ON BEHALF OF CONSOL)  
915 L STREET, SUITE 1210  
SACRAMENTO, CA 95814

LAURA LANGERWERF  
RUNYON SALTZMAN & EINHORN, INC.  
ONE CAPITOL MALL, SUITE 400  
SACRAMENTO, CA 95814

MATTHEW GILFILLAN  
RUNYON, SALTZMAN & EINHORN, INC.  
1 CAPITOL MALL, SUITE 400  
SACRAMENTO, CA 95814

MOLLY HARCOS  
RUNYON, SALTZMAN & EINHORN, INC.  
1 CAPITOL MALL, SUITE 400  
SACRAMENTO, CA 95814

WILLIAM W. WESTERFIELD, III  
ATTORNEY AT LAW  
STOEL RIVES LLP  
770 L STREET, SUITE 800  
SACRAMENTO, CA 95814

TONY MODDESETTE  
UCDAVIS MEDICAL CENTER  
4800 2ND AVE. SUITE 1500  
SACRAMENTO, CA 95817

WILLIAM D. BOYCE  
SACRAMENTO MUNICIPAL UTILITY DISTRICT  
PO BOX 15830  
SACRAMENTO, CA 95852-1830

JONATHAN DUBE  
ECOS CONSULTING  
309 SW 6TH AVENUE, STE 1000  
PORTLAND, OR 97204

STEVE GROVER  
ECONORTHWEST  
888 SW FIFTH AVENUE, SUITE 1460  
PORTLAND, OR 97204

## State Service

MAXINE HARRISON  
CALIF PUBLIC UTILITIES COMMISSION  
EXECUTIVE DIVISION  
320 WEST 4TH STREET SUITE 500  
LOS ANGELES, CA 90013

PETER LAI  
CALIF PUBLIC UTILITIES COMMISSION  
NATURAL GAS, ENERGY EFFICIENCY AND RESOU  
320 WEST 4TH STREET SUITE 500  
LOS ANGELES, CA 90013

ARIANA MERLINO  
CALIF PUBLIC UTILITIES COMMISSION  
NATURAL GAS, ENERGY EFFICIENCY AND RESOU  
1350 FRONT ST., STATE BLDG. ROOM 4006  
SAN DIEGO, CA 92101

FUNDA EMINE SAYGIN  
CALIF PUBLIC UTILITIES COMMISSION  
ELECTRICITY RESOURCES & PRICING BRANCH  
1350 FRONT ST., STATE BLDG. ROOM 4006  
SAN DIEGO, CA 92101

AARON J JOHNSON  
CALIF PUBLIC UTILITIES COMMISSION  
EXECUTIVE DIVISION  
ROOM 5210  
505 VAN NESS AVENUE  
SAN FRANCISCO, CA 94102-3214

BRIAN D. SCHUMACHER  
CALIF PUBLIC UTILITIES COMMISSION  
ENGINEERING, ENVIRONMENTAL STUDIES, CUST  
AREA 4-A  
505 VAN NESS AVENUE  
SAN FRANCISCO, CA 94102-3214

CHERYL COX  
CALIF PUBLIC UTILITIES COMMISSION  
RATEPAYER REPRESENTATION BRANCH  
ROOM 3-B  
505 VAN NESS AVENUE  
SAN FRANCISCO, CA 94102-3214

CHRISTINE S TAM  
CALIF PUBLIC UTILITIES COMMISSION  
ELECTRICITY RESOURCES & PRICING BRANCH  
ROOM 4209  
505 VAN NESS AVENUE  
SAN FRANCISCO, CA 94102-3214

DAN ADLER  
CALIF PUBLIC UTILITIES COMMISSION  
DIVISION OF STRATEGIC PLANNING  
ROOM 5119  
505 VAN NESS AVENUE  
SAN FRANCISCO, CA 94102-3214

DIANA L. LEE  
CALIF PUBLIC UTILITIES COMMISSION  
LEGAL DIVISION  
ROOM 4300  
505 VAN NESS AVENUE  
SAN FRANCISCO, CA 94102-3214

DONALD R SMITH  
CALIF PUBLIC UTILITIES COMMISSION  
ELECTRICITY RESOURCES & PRICING BRANCH  
ROOM 4209  
505 VAN NESS AVENUE  
SAN FRANCISCO, CA 94102-3214

DONNA L. WAGONER  
CALIF PUBLIC UTILITIES COMMISSION  
ENGINEERING, ENVIRONMENTAL STUDIES, CUST  
AREA 4-A  
505 VAN NESS AVENUE  
SAN FRANCISCO, CA 94102-3214

JAN REID  
CALIF PUBLIC UTILITIES COMMISSION  
ELECTRICITY RESOURCES & PRICING BRANCH  
ROOM 4209  
505 VAN NESS AVENUE  
SAN FRANCISCO, CA 94102-3214

GEORGE S TAGNIPES  
CALIF PUBLIC UTILITIES COMMISSION  
ENGINEERING, ENVIRONMENTAL STUDIES, CUST  
AREA 4-A  
505 VAN NESS AVENUE  
SAN FRANCISCO, CA 94102-3214

JULIE A FITCH  
CALIF PUBLIC UTILITIES COMMISSION  
EXECUTIVE DIVISION  
ROOM 5203  
505 VAN NESS AVENUE  
SAN FRANCISCO, CA 94102-3214

LAINIE MOTAMEDI  
CALIF PUBLIC UTILITIES COMMISSION  
DIVISION OF STRATEGIC PLANNING  
ROOM 5119  
505 VAN NESS AVENUE  
SAN FRANCISCO, CA 94102-3214

MARYAM EBKE  
CALIF PUBLIC UTILITIES COMMISSION  
DIVISION OF STRATEGIC PLANNING  
ROOM 5119  
505 VAN NESS AVENUE  
SAN FRANCISCO, CA 94102-3214

MEG GOTTSTEIN  
CALIF PUBLIC UTILITIES COMMISSION  
DIVISION OF ADMINISTRATIVE LAW JUDGES  
ROOM 5044  
505 VAN NESS AVENUE  
SAN FRANCISCO, CA 94102-3214

NORA Y. GATCHALIAN  
CALIF PUBLIC UTILITIES COMMISSION  
NATURAL GAS, ENERGY EFFICIENCY AND RESOU  
AREA 4-A  
505 VAN NESS AVENUE  
SAN FRANCISCO, CA 94102-3214

PHILIPPE AUCLAIR  
CALIF PUBLIC UTILITIES COMMISSION  
EXECUTIVE DIVISION  
ROOM 5218  
505 VAN NESS AVENUE  
SAN FRANCISCO, CA 94102-3214

ROBERT A. BARNETT  
CALIF PUBLIC UTILITIES COMMISSION  
DIVISION OF ADMINISTRATIVE LAW JUDGES

SHANNON EDDY  
CALIF PUBLIC UTILITIES COMMISSION  
EXECUTIVE DIVISION

ROOM 5008  
505 VAN NESS AVENUE  
SAN FRANCISCO, CA 94102-3214

ROOM 4102  
505 VAN NESS AVENUE  
SAN FRANCISCO, CA 94102-3214

STEVEN A. WEISSMAN  
CALIF PUBLIC UTILITIES COMMISSION  
DIVISION OF ADMINISTRATIVE LAW JUDGES  
ROOM 5125  
505 VAN NESS AVENUE  
SAN FRANCISCO, CA 94102-3214

TIM G DREW  
CALIF PUBLIC UTILITIES COMMISSION  
NATURAL GAS, ENERGY EFFICIENCY AND RESOU  
AREA 4-A  
505 VAN NESS AVENUE  
SAN FRANCISCO, CA 94102-3214

ZENAIDA G. TAPAWAN-CONWAY  
CALIF PUBLIC UTILITIES COMMISSION  
NATURAL GAS, ENERGY EFFICIENCY AND RESOU  
AREA 4-A  
505 VAN NESS AVENUE  
SAN FRANCISCO, CA 94102-3214

GERALD LAHR  
ASSOCIATION OF BAY AREA GOVERNMENTS  
PO BOX 2050  
OAKLAND, CA 94604-2050

MARY TUCKER  
SUPERVISING SPECIALIST  
ENVIRONMENTAL SERVICES DEPARTMENT  
777 N. 1ST STREET, SUITE 300  
SAN JOSE, CA 95112-6351

MEG GOTTSTEIN  
ADMINISTRATIVE LAW JUDGE  
PO BOX 210/21496 NATIONAL STREET  
VOLCANO, CA 95689

JOANNE VORHIES  
CA INTEGRATED WASTE MANAGEMENT BOARD  
1001 I STREET MS 14A  
SACRAMENTO, CA 95812

AL GARCIA  
CALIFORNIA ENERGY COMMISSION  
1516 9TH STREET  
SACRAMENTO, CA 95814

ALAN LOFASO  
CALIF PUBLIC UTILITIES COMMISSION  
EXECUTIVE DIVISION  
770 L STREET, SUITE 1050  
SACRAMENTO, CA 95814

DON SCHULTZ  
CALIF PUBLIC UTILITIES COMMISSION  
ELECTRICITY RESOURCES & PRICING BRANCH  
770 L STREET, SUITE 1050  
SACRAMENTO, CA 95814

JENNIFER TACHERA  
ATTORNEY AT LAW  
CALIFORNIA ENERGY COMMISSION  
1516 - 9TH STREET  
SACRAMENTO, CA 95814

MICHAEL MESSENGER  
CALIFORNIA ENERGY COMMISSION  
1516 9TH STREET  
SACRAMENTO, CA 95814

NANCY JENKINS  
PIER BUILDINGS PROGRAM MANAGER  
CALIFORNIA ENERGY COMMISSION  
1516 NINTH STREET MS43  
SACRAMENTO, CA 95814

SYLVIA BENDER  
CALIFORNIA ENERGY COMMISSION  
1516 9TH STREET, MS22  
SACRAMENTO, CA 95814

STAN PRICE  
NORTHWEST ENERGY EFFICIENCY COUNCIL  
157 YESLER WAY, SUITE 409  
SEATTLE, WA 98104

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# **Appendix A**

## **SoCalGas' Financial Statement, Balance Sheet and Income Statement**

**SOUTHERN CALIFORNIA GAS COMPANY  
FINANCIAL STATEMENT  
MARCH 31, 2005**

(a) Amounts and Kinds of Stock Authorized:

|                  |                    |                        |
|------------------|--------------------|------------------------|
| Preferred Stock  | 160,000 shares     | Par Value \$4,000,000  |
| Preferred Stock  | 840,000 shares     | Par Value \$21,000,000 |
| Preferred Stock  | 5,000,000 shares   | Without Par Value      |
| Preference Stock | 5,000,000 shares   | Without Par Value      |
| Common Stock     | 100,000,000 shares | Without Par Value      |

Amounts and Kinds of Stock Outstanding:

**PREFERRED STOCK**

|      |                |             |
|------|----------------|-------------|
| 6.0% | 79,011 shares  | \$1,975,275 |
| 6.0% | 783,032 shares | 19,575,800  |

**COMMON STOCK**

|                   |             |
|-------------------|-------------|
| 91,300,000 shares | 834,888,907 |
|-------------------|-------------|

(b) Terms of Preferred Stock:

Full information as to this item is given in connection with Application No. 92-08-018, to which reference is hereby made.

(c) Brief Description of Mortgage:

Full information as to this item is given in Application No. 93-07-012, 96-09-036 and 03-07-008 to which references are hereby made.

(d) Number and Amount of Bonds Authorized and Issued:

|   | Nominal<br>Date of<br>Issue | Par Value                |             | Interest Paid<br>in 2004 |
|---|-----------------------------|--------------------------|-------------|--------------------------|
|   |                             | Authorized<br>and Issued | Outstanding |                          |
| <u>First Mortgage Bonds:</u>                    |                             |                          |             |                          |
| 6.875% Series EE, due 2025                      | 11-01-93                    | 175,000,000              | 0           | 2,840,712                |
| 4.80% Series GG, due 2012                       | 10-02-02                    | 250,000,000              | 250,000,000 | 12,000,000               |
| 5.45% Series HH, due 2018                       | 10-14-03                    | 250,000,000              | 250,000,000 | 13,549,306               |
| 4.375% Series II, due 2011                      | 12-15-03                    | 250,000,000              | 250,000,000 | 6,380,208                |
| Var% Series JJ, due 2009                        | 12-10-04                    | 100,000,000              | 100,000,000 | 0                        |
| <u>Other Long-Term Debt</u>                     |                             |                          |             |                          |
| 6.375% SFr. Foreign Interest Payment Securities | 05-14-86                    | 7,877,038                | 7,877,038   | 502,157                  |
| 5.67% Medium-Term Note, due 2028                | 01-15-03                    | 5,000,000                | 5,000,000   | 283,500                  |

**SOUTHERN CALIFORNIA GAS COMPANY**  
**FINANCIAL STATEMENT**  
**MARCH 31, 2005**

| <u>Other Indebtedness:</u>       | <u>Date of Issue</u> | <u>Date of Maturity</u> | <u>Interest Rate</u> | <u>Outstanding</u> | <u>Interest Paid in 2004</u> |
|----------------------------------|----------------------|-------------------------|----------------------|--------------------|------------------------------|
| Commercial Paper & ST Bank Loans | 11/01/04             | 01/03/05                | 2.25%                | 0                  | \$20,466                     |

Amounts and Rates of Dividends Declared:

The amounts and rates of dividends during the past five fiscal years are as follows:

| <u>Preferred Stock</u> | <u>Shares Outstanding @ 12-31-04</u> | <u>Dividends Declared</u> |                    |                    |                    |                    |
|------------------------|--------------------------------------|---------------------------|--------------------|--------------------|--------------------|--------------------|
|                        |                                      | 2000                      | 2001               | 2002               | 2003               | 2004               |
| 6.0%                   | 79,011                               | \$118,517                 | \$118,516          | \$118,516          | \$118,516          | \$118,516          |
| 6.0%                   | 783,032                              | 1,174,548                 | 1,174,548          | 1,174,548          | 1,174,548          | 1,174,548          |
|                        | <u>862,043</u>                       | <u>\$1,293,065</u>        | <u>\$1,293,064</u> | <u>\$1,293,064</u> | <u>\$1,293,064</u> | <u>\$1,293,064</u> |

Common Stock  
Amount

\$200,000,000    \$190,000,000    \$200,000,000    \$200,000,000    \$200,000,000 [1]

A balance sheet and a statement of income and retained earnings of Applicant for the three months ended March 31, 2005, are attached hereto.

[1] Southern California Gas Company dividend to parent company, Sempra Energy.

**SOUTHERN CALIFORNIA GAS COMPANY  
BALANCE SHEET  
ASSETS AND OTHER DEBITS  
MARCH 31, 2005**

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| <b>1. UTILITY PLANT</b>        |   | <u>2005</u>          |
|--------------------------------|---|----------------------|
| 101                            | UTILITY PLANT IN SERVICE                                | \$7,121,586,201      |
| 102                            | UTILITY PLANT PURCHASED OR SOLD                         | -                    |
| 105                            | PLANT HELD FOR FUTURE USE                               | -                    |
| 106                            | COMPLETED CONSTRUCTION NOT CLASSIFIED                   | -                    |
| 107                            | CONSTRUCTION WORK IN PROGRESS                           | 130,009,303          |
| 108                            | ACCUMULATED PROVISION FOR DEPRECIATION OF UTILITY PLANT | (4,354,431,930)      |
| 111                            | ACCUMULATED PROVISION FOR AMORTIZATION OF UTILITY PLANT | (15,600,365)         |
| 117                            | GAS STORED-UNDERGROUND                                  | 57,031,531           |
| <b>TOTAL NET UTILITY PLANT</b> |   | <u>2,938,594,740</u> |

| <b>2. OTHER PROPERTY AND INVESTMENTS</b>    |   |                   |
|---|---|-------------------|
| 121   | NONUTILITY PROPERTY   | 114,337,509       |
| 122   | ACCUMULATED PROVISION FOR DEPRECIATION AND<br>AMORTIZATION OF NONUTILITY PROPERTY | (91,928,384)      |
| 123   | INVESTMENTS IN SUBSIDIARY COMPANIES   | -                 |
| 124   | OTHER INVESTMENTS   | 2,020,680         |
| 125   | SINKING FUNDS   | -                 |
| 128   | OTHER SPECIAL FUNDS   | 5,428,474         |
| <b>TOTAL OTHER PROPERTY AND INVESTMENTS</b> |   | <u>29,858,279</u> |

**SOUTHERN CALIFORNIA GAS COMPANY  
BALANCE SHEET  
ASSETS AND OTHER DEBITS  
MARCH 31, 2005**

**3. CURRENT AND ACCRUED ASSETS**

|     |  | <u>2005</u>               |
|-----|--|---------------------------|
| 131 | CASH   | 19,483,181                |
| 132 | INTEREST SPECIAL DEPOSITS                        | -                         |
| 134 | OTHER SPECIAL DEPOSITS                           | 5,537                     |
| 135 | WORKING FUNDS                                    | 103,105                   |
| 136 | TEMPORARY CASH INVESTMENTS                       | -                         |
| 141 | NOTES RECEIVABLE                                 | 855                       |
| 142 | CUSTOMER ACCOUNTS RECEIVABLE                     | 531,725,928               |
| 143 | OTHER ACCOUNTS RECEIVABLE                        | 7,768,448                 |
| 144 | ACCUMULATED PROVISION FOR UNCOLLECTIBLE ACCOUNTS | (5,911,071)               |
| 145 | NOTES RECEIVABLE FROM ASSOCIATED COMPANIES       | 333,388,741               |
| 146 | ACCOUNTS RECEIVABLE FROM ASSOCIATED COMPANIES    | 5,400,692                 |
| 151 | FUEL STOCK                                       | -                         |
| 152 | FUEL STOCK EXPENSE UNDISTRIBUTED                 | -                         |
| 154 | PLANT MATERIALS AND OPERATING SUPPLIES           | 11,961,630                |
| 155 | MERCHANDISE                                      | 13,326                    |
| 156 | OTHER MATERIALS AND SUPPLIES                     | -                         |
| 163 | STORES EXPENSE UNDISTRIBUTED                     | -                         |
| 164 | GAS STORED                                       | 5,068,133                 |
| 165 | PREPAYMENTS                                      | 2,521,103                 |
| 171 | INTEREST AND DIVIDENDS RECEIVABLE                | 31,439,229                |
| 173 | ACCRUED UTILITY REVENUES                         | -                         |
| 174 | MISCELLANEOUS CURRENT AND ACCRUED ASSETS         | 2,127,363                 |
| 175 | DERIVATIVE INSTRUMENT ASSETS                     | 650,117                   |
| 176 | LONG TERM PORTION OF DERIVATIVE ASSETS - HEDGES  | -                         |
|     | <b>TOTAL CURRENT AND ACCRUED ASSETS</b>          | <u><b>945,746,317</b></u> |

**4. DEFERRED DEBITS**

|     |   |                           |
|-----|---|---------------------------|
| 181 | UNAMORTIZED DEBT EXPENSE                      | 4,694,293                 |
| 182 | UNRECOVERED PLANT AND OTHER REGULATORY ASSETS | 278,795,185               |
| 183 | PRELIMINARY SURVEY & INVESTIGATION CHARGES    | 1,620,436                 |
| 184 | CLEARING ACCOUNTS                             | 617                       |
| 185 | TEMPORARY FACILITIES                          | -                         |
| 186 | MISCELLANEOUS DEFERRED DEBITS                 | 41,973,409                |
| 188 | RESEARCH AND DEVELOPMENT                      | -                         |
| 189 | UNAMORTIZED LOSS ON REACQUIRED DEBT           | 42,866,166                |
| 190 | ACCUMULATED DEFERRED INCOME TAXES             | -                         |
| 191 | UNRECOVERED PURCHASED GAS COSTS               | -                         |
|     | <b>TOTAL DEFERRED DEBITS</b>                  | <u><b>369,950,106</b></u> |

|  |                             |
|--|-----------------------------|
|  | <u><b>4,284,149,442</b></u> |
|--|-----------------------------|

**SOUTHERN CALIFORNIA GAS COMPANY  
BALANCE SHEET  
LIABILITIES AND OTHER CREDITS  
MARCH 31, 2005**

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**5. PROPRIETARY CAPITAL**

|  | <u>2005</u>              |
|--|--------------------------|
| 201 COMMON STOCK ISSUED                    | \$834,888,907            |
| 204 PREFERRED STOCK ISSUED                 | 21,551,075               |
| 207 PREMIUM ON CAPITAL STOCK               | -                        |
| 208 OTHER PAID-IN CAPITAL                  | -                        |
| 210 GAIN ON RETIRED CAPITAL STOCK          | 9,722                    |
| 211 MISCELLANEOUS PAID-IN CAPITAL          | 31,306,680               |
| 214 CAPITAL STOCK EXPENSE                  | (143,261)                |
| 216 UNAPPROPRIATED RETAINED EARNINGS       | 542,127,547              |
| 219 ACCUMULATED OTHER COMPREHENSIVE INCOME | <u>(4,329,361)</u>       |
| <br>TOTAL PROPRIETARY CAPITAL              | <br><u>1,425,411,309</u> |

**6. LONG-TERM DEBT**

|  |                        |
|--|------------------------|
| 221 BONDS                                  | 850,000,000            |
| 224 OTHER LONG-TERM DEBT                   | 12,877,038             |
| 225 UNAMORTIZED PREMIUM ON LONG-TERM DEBT  | -                      |
| 226 UNAMORTIZED DISCOUNT ON LONG-TERM DEBT | <u>(1,168,191)</u>     |
| <br>TOTAL LONG-TERM DEBT                   | <br><u>861,708,847</u> |

**7. OTHER NONCURRENT LIABILITIES**

|   |                       |
|---|-----------------------|
| 227 OBLIGATIONS UNDER CAPITAL LEASES - NONCURRENT     | -                     |
| 228.2 ACCUMULATED PROVISION FOR INJURIES AND DAMAGES  | 70,568,909            |
| 228.3 ACCUMULATED PROVISION FOR PENSIONS AND BENEFITS | 16,169,804            |
| 228.4 ACCUMULATED MISCELLANEOUS OPERATING PROVISIONS  | -                     |
| 230 ASSET RETIREMENT OBLIGATIONS                      | <u>9,161,848</u>      |
| <br>TOTAL OTHER NONCURRENT LIABILITIES                | <br><u>95,900,561</u> |

**SOUTHERN CALIFORNIA GAS COMPANY  
BALANCE SHEET  
LIABILITIES AND OTHER CREDITS  
MARCH 31, 2005**

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**8. CURRENT AND ACCRUED LIABILITES**

|   | <u>2005</u>          |
|---|----------------------|
| 231 NOTES PAYABLE                                 | -                    |
| 232 ACCOUNTS PAYABLE                              | 392,781,210          |
| 233 NOTES PAYABLE TO ASSOCIATED COMPANIES         | -                    |
| 234 ACCOUNTS PAYABLE TO ASSOCIATED COMPANIES      | 16,079,483           |
| 235 CUSTOMER DEPOSITS                             | 57,465,543           |
| 236 TAXES ACCRUED                                 | 53,536,639           |
| 237 INTEREST ACCRUED                              | 14,940,384           |
| 238 DIVIDENDS DECLARED                            | 323,266              |
| 241 TAX COLLECTIONS PAYABLE                       | 23,378,010           |
| 242 MISCELLANEOUS CURRENT AND ACCRUED LIABILITIES | 506,180,337          |
| 243 OBLIGATIONS UNDER CAPITAL LEASES - CURRENT    | -                    |
| 244 DERIVATIVE INSTRUMENT LIABILITIES             | 122,406,865          |
| 245 DERIVATIVE INSTRUMENT LIABILITIES - HEDGES    | -                    |
|   | <hr/>                |
| TOTAL CURRENT AND ACCRUED LIABILITIES             | <u>1,187,091,737</u> |

**9. DEFERRED CREDITS**

|   |                    |
|---|--------------------|
| 252 CUSTOMER ADVANCES FOR CONSTRUCTION              | 40,681,295         |
| 253 OTHER DEFERRED CREDITS                          | 244,236,045        |
| 254 OTHER REGULATORY LIABILITIES                    | 253,330,473        |
| 255 ACCUMULATED DEFERRED INVESTMENT TAX CREDITS     | 40,397,439         |
| 257 UNAMORTIZED GAIN ON REACQUIRED DEBT             | -                  |
| 281 ACCUMULATED DEFERRED INCOME TAXES - ACCELERATED | -                  |
| 282 ACCUMULATED DEFERRED INCOME TAXES - PROPERTY    | 135,391,736        |
| 283 ACCUMULATED DEFERRED INCOME TAXES - OTHER       | -                  |
|   | <hr/>              |
| TOTAL DEFERRED CREDITS                              | <u>714,036,988</u> |

TOTAL LIABILITIES AND OTHER CREDITS 4,284,149,442

**SOUTHERN CALIFORNIA GAS COMPANY  
STATEMENT OF INCOME AND RETAINED EARNINGS  
THREE MONTHS ENDED MARCH 31, 2005**

**1. UTILITY OPERATING INCOME**

|       |  |                 |                 |
|-------|--|-----------------|-----------------|
| 400   | OPERATING REVENUES                           |                 | \$1,242,855,298 |
| 401   | OPERATING EXPENSES                           | \$1,010,481,670 |                 |
| 402   | MAINTENANCE EXPENSES                         | 24,470,514      |                 |
| 403-7 | DEPRECIATION AND AMORTIZATION EXPENSES       | 65,708,923      |                 |
| 408.1 | TAXES OTHER THAN INCOME TAXES                | 15,640,357      |                 |
| 409.1 | INCOME TAXES                                 | 35,440,751      |                 |
| 410.1 | PROVISION FOR DEFERRED INCOME TAXES          | 14,715,000      |                 |
| 411.1 | PROVISION FOR DEFERRED INCOME TAXES - CREDIT | (2,210,000)     |                 |
| 411.4 | INVESTMENT TAX CREDIT ADJUSTMENTS            | (804,000)       |                 |
| 411.6 | GAIN FROM DISPOSITION OF UTILITY PLANT       | -               |                 |
|       |  |                 |                 |
|       | TOTAL OPERATING REVENUE DEDUCTIONS           |                 | 1,163,443,215   |
|       | NET OPERATING INCOME                         |                 | 79,412,083      |

**2. OTHER INCOME AND DEDUCTIONS**

|       |   |           |              |
|-------|---|-----------|--------------|
| 415   | REVENUE FROM MERCHANDISING, JOBBING AND CONTRACT WORK | -         |              |
| 417   | REVENUES FROM NONUTILITY OPERATIONS                   | -         |              |
| 417.1 | EXPENSES OF NONUTILITY OPERATIONS                     | (27,717)  |              |
| 418   | NONOPERATING RENTAL INCOME                            | 75,801    |              |
| 418.1 | EQUITY IN EARNINGS OF SUBSIDIARIES                    | -         |              |
| 419   | INTEREST AND DIVIDEND INCOME                          | 374,288   |              |
| 419.1 | ALLOWANCE FOR OTHER FUNDS USED DURING CONSTRUCTION    | 1,221,723 |              |
| 421   | MISCELLANEOUS NONOPERATING INCOME                     | 192,210   |              |
| 421.2 | LOSS ON DISPOSITION OF PROPERTY                       | -         |              |
|       |   |           |              |
|       | TOTAL OTHER INCOME                                    | 1,836,305 |              |
| 425   | MISCELLANEOUS AMORTIZATION                            | -         |              |
| 426   | MISCELLANEOUS OTHER INCOME DEDUCTIONS                 | 823,084   |              |
|       |   | 823,084   |              |
| 408.2 | TAXES OTHER THAN INCOME TAXES                         | 52,776    |              |
| 409.2 | INCOME TAXES  | 694,000   |              |
| 410.2 | PROVISION FOR DEFERRED INCOME TAXES                   | 29,000    |              |
| 411.2 | PROVISION FOR DEFERRED INCOME TAXES - CREDIT          | (409,000) |              |
| 420   | INVESTMENT TAX CREDITS                                | (36,000)  |              |
|       |   | 330,776   |              |
|       | TOTAL TAXES ON OTHER INCOME AND DEDUCTIONS            | 330,776   |              |
|       | TOTAL OTHER INCOME AND DEDUCTIONS                     |           | 682,445      |
|       | INCOME BEFORE INTEREST CHARGES                        |           | 80,094,528   |
|       | NET INTEREST CHARGES*                                 |           | 10,967,579   |
|       | NET INCOME  |           | \$69,126,949 |

\*NET OF ALLOWANCE FOR BORROWED FUNDS USED DURING CONSTRUCTION. (\$345,812).



**SOUTHERN CALIFORNIA GAS COMPANY  
STATEMENT OF INCOME AND RETAINED EARNINGS  
THREE MONTHS ENDED MARCH 31, 2005**

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**3. RETAINED EARNINGS**

|  |                      |
|--|----------------------|
| RETAINED EARNINGS AT BEGINNING OF PERIOD, AS PREVIOUSLY REPORTED | \$523,323,863        |
| NET INCOME (FROM PRECEDING PAGE)                                 | 69,126,949           |
| DIVIDEND TO PARENT COMPANY                                       | (323,265)            |
| DIVIDENDS DECLARED - PREFERRED STOCK                             | (50,000,000)         |
| OTHER RETAINED EARNINGS ADJUSTMENT                               | -                    |
| RETAINED EARNINGS AT END OF PERIOD                               | <u>\$542,127,547</u> |

# **Appendix B**

## **Statement of Original Cost & Depreciation Reserve**

## SOUTHERN CALIFORNIA GAS COMPANY

Plant Investment and Accumulated Depreciation

As of March 31, 2005

| ACCOUNT<br>NUMBER                 | DESCRIPTION                       | ORIGINAL<br>COSTS       | ACCUMULATED<br>RESERVE  |
|-----------------------------------|-----------------------------------|-------------------------|-------------------------|
| <b>INTANGIBLE ASSETS</b>          |                                   |                         |                         |
| 301                               | Organization                      | \$ 76,457               | \$ -                    |
| 302                               | Franchise and Consents            | 515,639                 |                         |
|                                   | Total Intangible Assets           | <u>\$ 592,096</u>       | <u>\$ -</u>             |
| <b>UNDERGROUND STORAGE:</b>       |                                   |                         |                         |
| 350                               | Land                              | \$ 5,289,613            | \$ -                    |
| 350                               | Storage Rights                    | 17,338,835              | 15,588,101              |
| 350                               | Rights-of-Way                     | 25,354                  | 9,596                   |
| 351                               | Structures and Improvements       | 23,842,117              | 15,135,469              |
| 352                               | Wells                             | 164,346,437             | 111,812,047             |
| 353                               | Lines                             | 80,489,124              | 83,845,131              |
| 354                               | Compressor Station and Equipment  | 95,194,579              | 63,279,257              |
| 355                               | Measuring And Regulator Equipment | 2,210,264               | 1,214,908               |
| 356                               | Purification Equipment            | 73,559,216              | 51,467,641              |
| 357                               | Other Equipment                   | 5,898,082               | 1,918,965               |
|                                   | Total Underground Storage         | <u>\$ 468,193,621</u>   | <u>\$ 344,271,115</u>   |
| <b>TRANSMISSION PLANT- OTHER:</b> |                                   |                         |                         |
| 365                               | Land                              | \$ 2,012,666            | \$ -                    |
| 365                               | Land Rights                       | 20,434,291              | 11,212,421              |
| 366                               | Structures and Improvements       | 27,733,735              | 18,838,419              |
| 367                               | Mains                             | 715,053,348             | 450,959,656             |
| 368                               | Compressor Station and Equipment  | 157,661,955             | 81,449,634              |
| 369                               | Measuring And Regulator Equipment | 41,319,506              | 25,133,845              |
| 371                               | Other Equipment                   | 3,441,435               | 1,047,738               |
|                                   | Total Transmission Plant          | <u>\$ 967,656,935</u>   | <u>\$ 588,641,712</u>   |
| <b>DISTRIBUTION PLANT:</b>        |                                   |                         |                         |
| 374                               | Land                              | \$ 28,252,058           | \$ -                    |
| 374                               | Land Rights                       | 2,557,798               | 12,264                  |
| 375                               | Structures and Improvements       | 165,190,498             | 42,019,896              |
| 376                               | Mains                             | 2,424,835,483           | 1,326,830,162           |
| 378                               | Measuring And Regulator Equipment | 50,026,597              | 32,199,424              |
| 380                               | Services                          | 1,712,430,769           | 1,362,825,544           |
| 381                               | Meters                            | 348,546,663             | 130,000,396             |
| 382                               | Meter Installation                | 228,024,229             | 165,899,192             |
| 383                               | House Regulators                  | 103,976,050             | 44,015,000              |
| 387                               | Other Equipment                   | 22,550,378              | 14,929,349              |
|                                   | Total Distribution Plant          | <u>\$ 5,086,390,522</u> | <u>\$ 3,118,731,227</u> |
| <b>GENERAL PLANT:</b>             |                                   |                         |                         |
| 389                               | Land                              | \$ 1,414,274            | \$ -                    |
| 389                               | Land Rights                       | 74,300                  |                         |
| 390                               | Structures and Improvements       | 96,195,196              | 68,042,563              |
| 391                               | Office Furniture and Equipment    | 319,201,121             | 136,155,976             |
| 392                               | Transportation Equipment          | 1,701,669               | 1,524,034               |
| 393                               | Stores Equipment                  | 768,778                 | 663,584                 |
| 394                               | Shop and Garage Equipment         | 48,158,806              | 20,255,664              |
| 395                               | Laboratory Equipment              | 7,011,481               | 3,471,413               |
| 396                               | Construction Equipment            | 95,317                  | 60,996                  |

**SOUTHERN CALIFORNIA GAS COMPANY**

Plant Investment and Accumulated Depreciation

As of March 31, 2005

| <b>ACCOUNT<br/>NUMBER</b> | <b>DESCRIPTION</b>       | <b>ORIGINAL<br/>COSTS</b> | <b>ACCUMULATED<br/>RESERVE</b> |
|---------------------------|--------------------------|---------------------------|--------------------------------|
| 397                       | Communication Equipments | 118,828,237               | 71,311,203                     |
| 398                       | Miscellaneous Equipment  | 5,200,202                 | (2,561,681)                    |
|                           | Total General Plant      | <u>\$ 598,649,381</u>     | <u>\$ 298,923,753</u>          |

# **Appendix C**

## **Summary of Earnings**

**SOUTHERN CALIFORNIA GAS COMPANY  
SUMMARY OF EARNINGS  
THREE MONTHS ENDED MARCH 31, 2005  
(DOLLARS IN MILLIONS)**

| <u>Line No.</u> | <u>Item</u>                | <u>Amount</u> |
|-----------------|----------------------------|---------------|
| 1               | Operating Revenue          | 1,243         |
| 2               | Operating Expenses         | <u>1,164</u>  |
| 3               | Net Operating Income       | <u>79</u>     |
| 4               | Weighted Average Rate Base | 2,376         |
| 5               | Rate of Return*            | 8.68%         |

\*Authorized Cost of Capital

# **Appendix D**

## **State/Government Service List**

ATTORNEY GENERAL  
STATE OF CALIFORNIA  
1300 "I" STREET  
SACRAMENTO, CA 95814

DEPARTMENT OF GENERAL SERVICES  
STATE OF CALIFORNIA  
915 CAPITOL MALL  
SACRAMENTO, CA 95814

COUNTY CLERK  
FRESNO COUNTY  
2221 KERN ST.  
FRESNO, CA 93721

COUNTY COUNSEL  
FRESNO COUNTY  
2220 TULARE ST., 5TH FLOOR  
FRESNO, CA 93721

HARRY M. FREE  
COUNTY CLERK  
IMPERIAL COUNTY  
EL CENTRO, CA 92243

WILLIAM JAMES  
DISTRICT ATTORNEY  
IMPERIAL COUNTY  
940 W. MAIN ST., STE. 101  
EL CENTRO, CA 92243

RALPH B. JORDAN  
COUNTY COUNSEL  
KERN COUNTY  
1415 TRUXTON  
BAKERSFIELD, CA 93301

SUE PICKETT  
CLERK OF THE BOARD  
KERN COUNTY  
1115 TRUXTON  
BAKERSFIELD, CA 93301

J. G. O'ROURKE  
DISTRICT ATTORNEY  
KINGS COUNTY  
1400 W. LACEY BLVD.  
HANFORD, CA 93230

JOAN L. BULLOCK  
COUNTY CLERK  
KINGS COUNTY  
1400 W. LACEY BLVD.  
HANFORD, CA 93230

DISTRICT ATTORNEY  
LOS ANGELES COUNTY  
111 NO. HILL STREET  
LOS ANGELES, CA 90012

COUNTY CLERK  
LOS ANGELES COUNTY  
12400 E. IMPERIAL HIGHWAY  
NORWALK, CA 90650

DISTRICT ATTORNEY  
ORANGE COUNTY  
700 CIVIC CENTER DRIVE WEST  
SANTA ANA, CA 92701

LEE A. BRANCH  
COUNTY CLERK  
ORANGE COUNTY  
700 CIVIC CENTER DR. RM D100  
SANTA ANA, CA 92701

DISTRICT ATTORNEY  
RIVERSIDE COUNTY  
2041 IOWA AVE.  
RIVERSIDE, CA 92501

COUNTY CLERK  
RIVERSIDE COUNTY  
4080 LEMON STREET  
RIVERSIDE, CA 92501

COUNTY CLERK  
SAN BERNARDINO COUNTY  
175 W. 5TH ST  
SAN BERNARDINO, CA 92415

DISTRICT ATTORNEY  
SAN BERNARDINO COUNTY  
175 W. 5TH ST.  
SAN BERNARDINO, CA 92415

COUNTY CLERK  
SAN LUIS OBISPO COUNTY  
COURT HOUSE ANNEX  
SAN LUIS OBISPO, CA 93408

DISTRICT ATTORNEY  
SAN LUIS OBISPO COUNTY  
COURT HOUSE ANNEX  
SAN LUIS OBISPO, CA 93408

H. C. MENZEL  
COUNTY CLERK  
SANTA BARBARA COUNTY  
105 E. ANAPUMA ST.  
SANTA BARBARA, CA 93102

S. M. RODEN  
DISTRICT ATTORNEY  
SANTA BARBARA COUNTY  
105 E. ANAPUMA ST.  
SANTA BARBARA, CA 93102

JAY BAYLESS  
COUNTY CLERK  
TULARE COUNTY  
CIVIC CENTER  
VISALIA, CA 93277

WILLIAM A. RICHMOND  
DISTRICT ATTORNEY  
TULARE COUNTY  
CIVIC CENTER  
VISALIA, CA 93277

MICHAEL D. BRADBURY  
DISTRICT ATTORNEY  
VENTURA COUNTY  
800 SO. VICTORIA AVE.  
VENTURA, CA 93009

R. L. HAMM  
COUNTY CLERK  
VENTURA COUNTY  
800 SO. VICTORIA AVE.  
VENTURA, CA 93009



CITY ATTORNEY  
ADELANTO CITY HALL  
P.O. BOX 10  
ADELANTO, CA 92301

CITY CLERK  
ADELANTO CITY HALL  
P. O. BOX 10  
ADELANTO, CA 92301

CITY ATTORNEY  
AGOURA HILLS CITY HALL  
30101 AGOURA CT., #102  
AGOURA HILLS, CA 91301

CITY CLERK  
AGOURA HILLS CITY HALL  
30101 AGOURA CT., #102  
AGOURA HILLS, CA 91301

CITY ATTORNEY  
ALHAMBRA CITY HALL  
111 S. FIRST ST  
ALHAMBRA, CA 91801

CITY CLERK  
ALHAMBRA CITY HALL  
111 S. FIRST ST.  
ALHAMBRA, CA 91801

CITY ATTORNEY  
ANAHEIM CITY HALL  
P.O. BOX 3222  
ANAHEIM, CA 92803

CITY CLERK  
ANAHEIM CITY HALL  
P.O. BOX 3222  
ANAHEIM, CA 92803

CITY CLERK  
ARCADIA CITY HALL  
240 W. HUNTINGTON DR.  
ARCADIA, CA 91006

CITY ATTORNEY  
ARCADIA CITY HALL  
240 W. HUNTINGTON DR  
ARCADIA, CA 91006

CITY ATTORNEY  
ARROYO GRANDE CITY HALL  
214 E. BRANCH ST  
ARROYO GRANDE, CA 93420

CITY CLERK  
ARROYO GRANDE CITY HALL  
214 E. BRANCH ST.  
ARROYO GRANDE, CA 93420

CITY ATTORNEY  
ARTESIA CITY HALL  
18747 CLARKDALE AVE.  
ARTESIA, CA 90701

CITY CLERK  
ARTESIA CITY HALL  
18747 CLARKDALE AVE.  
ARTESIA, CA 90701

CITY ATTORNEY  
ARVIN CITY HALL  
200 CAMPUS DR.  
ARVIN, CA 93203

CITY CLERK  
ARVIN CITY HALL  
200 CAMPUS DR.  
ARVIN, CA 93203

CITY ATTORNEY  
ATASCADERO CITY HALL  
6500 PALMA AVE.  
ATASCADERO, CA 93422

CITY CLERK  
ATASCADERO CITY HALL  
6500 PALMA AVE.  
ATASCADERO, CA 93422

CITY ATTORNEY  
AVENAL CITY HALL  
919 SKYLINE AVE.  
AVENAL, CA 93204

CITY CLERK  
AVENAL CITY HALL  
919 SKYLINE AVE.  
AVENAL, CA 93204

CITY ATTORNEY  
AZUSA CITY HALL  
213 E. FOOTHILL BLVD.  
AZUSA, CA 91702

CITY CLERK  
AZUSA CITY HALL  
213 E. FOOTHILL BLVD.  
AZUSA, CA 91702

CITY ATTORNEY  
BAKERSFIELD CITY HALL  
1501 TRUXTUN AVE.  
BAKERSFIELD, CA 93301

CITY CLERK  
BAKERSFIELD CITY HALL  
1501 TRUXTUN AVE.  
BAKERSFIELD, CA 93301

CITY ATTORNEY  
BALDWIN PARK CITY HALL  
14403 E. PACIFIC AVE.  
BALDWIN PARK, CA 91706

CITY CLERK  
BALDWIN PARK CITY HALL  
14403 E. PACIFIC AVE.  
BALDWIN PARK, CA 91706

CITY ATTORNEY  
BANNING CITY HALL  
99 EAST RAMSEY ST.  
BANNING, CA 92220

CITY CLERK  
BANNING CITY HALL  
99 EAST RAMSEY ST.  
BANNING, CA 92220

CITY ATTORNEY  
BEAUMONT CITY HALL  
550 6TH AVE.  
BEAUMONT, CA 92223

CITY CLERK  
BEAUMONT CITY HALL  
550 6TH AVE.  
BEAUMONT, CA 92223

CITY ATTORNEY  
BELL CITY HALL  
6330 PINE AVE.  
BELL, CA 90201

CITY CLERK  
BELL CITY HALL  
6330 PINE AVE.  
BELL, CA 90201

CITY ATTORNEY  
BELL GARDENS CITY HALL  
7100 SO. GARFIELD AVE.  
BELL GARDENS, CA 90201

CITY CLERK  
BELL GARDENS CITY HALL  
7100 SO. GARFIELD AVE.  
BELL GARDENS, CA 90201

CITY ATTORNEY  
BELLFLOWER CITY HALL  
16600 E. CIVIC CENTER DR.  
BELLFLOWER, CA 90706

CITY CLERK  
BELLFLOWER CITY HALL  
16600 E. CIVIC CENTER DR.  
BELLFLOWER, CA 90706

CITY ATTORNEY  
BEVERLY HILLS CITY HALL  
450 NO. CRESCENT DR.  
BEVERLY HILLS, CA 90210

CITY CLERK  
BEVERLY HILLS CITY HALL  
450 NO. CRESCENT DR.  
BEVERLY HILLS, CA 90210

CITY ATTORNEY  
BIG BEAR LAKE CITY  
P. O. BOX 2800  
BIG BEAR LAKE, CA 92315

CITY CLERK  
BIG BEAR LAKE CITY  
P. O. BOX 2800  
BIG BEAR LAKE, CA 92315

CITY CLERK  
BLYTHE CITY HALL  
200 NO. SPRING ST.  
CITY OF BLYTHE, CA 92225

CITY ATTORNEY  
BLYTHE CITY HALL  
200 NO. SPRING ST.  
CITY OF BLYTHE, CA 92225

CITY ATTORNEY  
BRADBURY CITY HALL  
600 WINSTON AVE.  
BRADBURY, CA 91010

CITY CLERK  
BRADBURY CITY HALL  
600 WINSTON AVE.  
BRADBURY, CA 91010

CITY ATTORNEY  
BRAWLEY CITY HALL  
400 MAIN ST.  
BRAWLEY, CA 92227

CITY CLERK  
BRAWLEY CITY HALL  
400 MAIN STREET  
BRAWLEY, CA 92227

CITY ATTORNEY  
BREA CITY HALL  
1 CIVIC CENTER CIRCLE  
BREA, CA 92621

CITY CLERK  
BREA CITY HALL  
1 CIVIC CENTER CIRCLE  
BREA, CA 92621

CITY ATTORNEY  
BUENA PARK CITY HALL  
6650 BEACH BLVD.  
BUENA PARK, CA 90620

CITY CLERK  
BUENA PARK CITY HALL  
6650 BEACH BLVD.  
BUENA PARK, CA 90620

CITY ATTORNEY  
BURBANK CITY HALL  
275 E. OLIVE AVE.  
BURBANK, CA 91502

CITY CLERK  
BURBANK CITY HALL  
275 E. OLIVE AVE.  
BURBANK, CA 91502

CITY CLERK  
CALEXICO CITY HALL  
408 HEBER AVE.  
CALEXICO, CA 92231

CITY ATTORNEY  
CALIFORNIA CITY CITY HALL  
21000 HACIENDA BLVD.  
CALIFORNIA CITY, CA 93505

CITY CLERK  
CALIFORNIA CITY CITY HALL  
21000 HACIENDA BLVD.  
CALIFORNIA CITY, CA 93505

CITY ATTORNEY  
CALIPATRIA CITY HALL  
101 NO. LAKE AVE.  
CALIPATRIA, CA 92233

CITY CLERK  
CALIPATRIA CITY HALL  
101 NO. LAKE AVE.  
CALIPATRIA, CA 92233

CITY ATTORNEY  
CAMARILLO CITY HALL  
601 CARMEN DRIVE  
CAMARILLO, CA 93010

CITY CLERK  
CAMARILLO CITY HALL  
601 CARMEN DRIVE  
CAMARILLO, CA 93010

CITY ATTORNEY  
CANYON LAKE CITY  
31532 RAILROAD CANYON RD, #101  
CANYON LAKE, CA 92587

CITY CLERK  
CANYON LAKE CITY  
31532 RAILROAD CANYON RD, #101  
CANYON LAKE, CA 92587

CITY ATTORNEY  
CARPINTERIA CITY HALL  
5775 CARPINTERIA AVE.  
CARPINTERIA, CA 93013

CITY CLERK  
CARPINTERIA CITY HALL  
5775 CARPINTERIA AVE.  
CARPINTERIA, CA 93013

CITY ATTORNEY  
CARSON CITY HALL  
701 E. CARSON ST.  
CARSON, CA 90745

CITY CLERK  
CARSON CITY HALL  
701 E. CARSON ST.  
CARSON, CA 90745

CITY ATTORNEY  
CATHEDRAL CITY CITY HALL  
68625 PEREZ ROAD  
CATHEDRAL CITY, CA 92234

CITY CLERK  
CATHEDRAL CITY CITY HALL  
68625 PEREZ ROAD  
CATHEDRAL CITY, CA 92234

CITY ATTORNEY  
CERRITOS CITY HALL  
BLOOMFIELD AND 183RD ST.  
CERRITOS, CA 90701

CITY CLERK  
CERRITOS CITY HALL  
BLOOMFIELD AND 183RD ST.  
CERRITOS, CA 90701

CITY ATTORNEY  
CHINO CITY HALL  
13220 CENTRAL AVE.  
CHINO, CA 91710

CITY CLERK  
CHINO CITY HALL  
13220 CENTRAL AVE.  
CHINO, CA 91710

CITY CLERK  
CLAREMONT CITY HALL  
207 HARVARD AVE.  
CLAREMONT, CA 91711

CITY ATTORNEY  
CLAREMONT CITY HALL  
207 HARVARD AVE.  
CLAREMONT, CA 91711

CITY ATTORNEY  
COACHELLA CITY HALL  
1515 SIXTH ST.  
COACHELLA, CA 92236

CITY CLERK  
COACHELLA CITY HALL  
1515 SIXTH ST.  
COACHELLA, CA 92236

CITY ATTORNEY  
COLTON CITY HALL  
650 N. LACADENA DR.  
COLTON, CA 92324

CITY CLERK  
COLTON CITY HALL  
650 N. LACADENA DR.  
COLTON, CA 92324

CITY ATTORNEY  
COMMERCE CITY HALL  
5655 JILSON ST.  
COMMERCE, CA 90040

CITY CLERK  
COMMERCE CITY HALL  
5655 JILSON ST.  
COMMERCE, CA 90040

CITY ATTORNEY  
COMPTON CITY HALL  
205 SO. WILLOWBROOK AVE.  
COMPTON, CA 90220

CITY CLERK  
COMPTON CITY HALL  
205 SO. WILLOWBROOK AVE.  
COMPTON, CA 90220

CITY ATTORNEY  
CORCORAN CITY HALL  
1033 CHITTENDEN AVE.  
CORCORAN, CA 93212

CITY CLERK  
CORCORAN CITY HALL  
1033 CHITTENDEN AVE.  
CORCORAN, CA 93212

CITY ATTORNEY  
CORONA CITY HALL  
815 W. SIXTH ST.  
CORONA, CA 91720

CITY CLERK  
CORONA CITY HALL  
815 W. SIXTH ST.  
CORONA, CA 91720

CITY ATTORNEY  
COSTA MESA CITY HALL  
77 FAIR DRIVE  
COSTA MESA, CA 92626

CITY CLERK  
COSTA MESA CITY HALL  
77 FAIR DRIVE  
COSTA MESA, CA 92626

CITY ATTORNEY  
COVINA CITY HALL  
125 E. COLLEGE ST.  
COVINA, CA 91723

CITY CLERK  
COVINA CITY HALL  
125 E. COLLEGE ST.  
COVINA, CA 91723

CITY ATTORNEY  
CUDAHY CITY HALL  
5240 SANTA ANA ST.  
CUDAHY, CA 90201

CITY CLERK  
CUDAHY CITY HALL  
5240 SANTA ANA ST.  
CUDAHY, CA 90201

CITY ATTORNEY  
CULVER CITY CITY HALL  
9770 CULVER BLVD.  
CULVER CITY, CA 90230

CITY CLERK  
CULVER CITY CITY HALL  
9770 CULVER BLVD.  
CULVER CITY, CA 90230

CITY ATTORNEY  
CYPRESS CITY HALL  
5275 ORANGE AVE.  
CYPRESS, CA 90630

CITY CLERK  
CYPRESS CITY HALL  
5275 ORANGE AVE.  
CYPRESS, CA 90630

CITY ATTORNEY  
DANA POINT CITY  
33282 GOLDEN LANTERN ST.  
DANA POINT, CA 92629

CITY CLERK  
DANA POINT CITY  
33282 GOLDEN LANTERN ST.  
DANA POINT, CA 92629

CITY ATTORNEY  
DELANO CITY HALL  
1015 11TH AVE.  
DELANO, CA 93215

CITY CLERK  
DELANO CITY HALL  
1015 11TH AVE.  
DELANO, CA 93215

CITY ATTORNEY  
DESERT HOT SPRINGS CITY HALL  
65950 PIERSON BL.  
DESERT HOT SPRINGS, CA 92240

CITY CLERK  
DESERT HOT SPRINGS CITY HALL  
65950 PIERSON BL.  
DESERT HOT SPRINGS, CA 92240

CITY ATTORNEY  
DIAMOND BAR CITY  
21660 E. COPLEY DR. #100  
DIAMOND BAR, CA 91765

CITY CLERK  
DIAMOND BAR CITY  
21660 E. COPLEY DR., #100  
DIAMOND BAR, CA 91765

CITY ATTORNEY  
DINUBA CITY HALL  
1390 E. ELIZABETH WAY  
DINUBA, CA 93618

CITY CLERK  
DINUBA CITY HALL  
1390 E. ELIZABETH WAY  
DINUBA, CA 93618

CITY ATTORNEY  
DOWNEY CITY HALL  
8425 2ND ST.  
DOWNEY, CA 90241

CITY CLERK  
DOWNEY CITY HALL  
8425 2ND ST.  
DOWNEY, CA 90241

CITY CLERK  
DUARTE CITY HALL  
1600 HUNTINGTON DR.  
DUARTE, CA 91010

CITY ATTORNEY  
DUARTE CITY HALL  
1600 HUNTINGTON DR.  
DUARTE, CA 91010

CITY ATTORNEY  
EL CENTRO CITY HALL  
1275 MAIN ST.  
EL CENTRO, CA 92243

CITY CLERK  
EL CENTRO CITY HALL  
1275 MAIN ST.  
EL CENTRO, CA 92243

CITY ATTORNEY  
EL MONTE CITY HALL  
11333 VALLEY BLVD.  
EL MONTE, CA 91734

CITY CLERK  
EL MONTE CITY HALL  
11333 VALLEY BLVD.  
EL MONTE, CA 91734

CITY ATTORNEY  
EL SEGUNDO CITY HALL  
350 MAIN ST.  
EL SEGUNTO, CA 90245

CITY CLERK  
EL SEGUNDO CITY HALL  
350 MAIN ST.  
EL SEGUNDO, CA 90245

CITY ATTORNEY  
EXETER CITY HALL  
P. O. BOX 237  
EXETER, CA 93221

CITY CLERK  
EXETER CITY HALL  
P. O. BOX 237  
EXETER, CA 93221

CITY ATTORNEY  
FARMERSVILLE CITY HALL  
147 E. FRONT ST.  
FARMERSVILLE, CA 93223

CITY CLERK  
FARMERSVILLE CITY HALL  
147 E. FRONT ST.  
FARMERSVILLE, CA 93223

CITY ATTORNEY  
FILLMORE CITY HALL  
524 SESPE AVE.  
FILLMORE, CA 93015

CITY CLERK  
FILLMORE CITY HALL  
524 SESPE AVE.  
FILLMORE, CA 93015

DEP. CITY CLERK  
FONTANA CITY  
8353 SIERRA AVE.  
FONTANA, CA 92335

CITY ATTORNEY  
FONTANA CITY HALL  
8353 SIERRA AVE.  
FONTANA, CA 92335

CITY ATTORNEY  
FOUNTAIN VALLEY CITY HALL  
10200 SLATER AVE.  
FOUNTAIN VALLEY, CA 92708

CITY CLERK  
FOUNTAIN VALLEY CITY HALL  
10200 SLATER AVE.  
FOUNTAIN VALLEY, CA 92708

CITY ATTORNEY  
FOWLER CITY  
128 SOUTH FIFTH  
FOWLER, CA 23625

CITY CLERK  
FOWLER CITY  
128 SOUTH FIFTH  
FOWLER, CA 93625

CITY ATTORNEY  
FULLERTON CITY HALL  
303 W. COMMONWEALTH  
FULLERTON, CA 92632

CITY CLERK  
FULLERTON CITY HALL  
303 W. COMMONWEALTH  
FULLERTON, CA 92632

CITY ATTORNEY  
GARDEN GROVE CITY HALL  
11300 STANFORD AVE.  
GARDEN GROVE, CA 92640

CITY CLERK  
GARDEN GROVE CITY HALL  
11300 STANFORD AVE.  
GARDEN GROVE, CA 92640

CITY ATTORNEY  
GARDENA CITY HALL  
1700 W 162ND ST.  
GARDENA, CA 90247

CITY CLERK  
GARDENA CITY HALL  
1700 W 162ND ST.  
GARDENA, CA 90247

CITY ATTORNEY  
GLENDALE CITY HALL  
613 E. BROADWAY  
GLENDALE, CA 91205

CITY CLERK  
GLENDALE CITY HALL  
613 E. BROADWAY  
GLENDALE, CA 91205

CITY ATTORNEY  
GLENDORA CITY HALL  
116 E. FOOTHILL BLVD.  
GLENDORA, CA 91740

CITY CLERK  
GLENDORA CITY HALL  
116 E. FOOTHILL BLVD.  
GLENDORA, CA 91740

CITY ATTORNEY  
GRAND TERRACE CITY HALL  
22795 BARTON ROAD  
GRAND TERRACE, CA 92324

CITY CLERK  
GRAND TERRACE CITY HALL  
22795 BARTON ROAD  
GRAND TERRACE, CA 92324

CITY ATTORNEY  
GROVER CITY CITY HALL  
154 SO. 8TH ST.  
GROVER CITY, CA 93433

CITY CLERK  
GROVER CITY CITY HALL  
154 SO. 8TH ST.  
GROVER CITY, CA 93433

CITY ATTORNEY  
GUADALUPE CITY HALL  
918 OBISPO ST.  
GUADALUPE, CA 93434

CITY CLERK  
GUADALUPE CITY HALL  
21815 PIONEER BLVD.  
GUADALUPE, CA 93434

CITY ATTORNEY  
HANFORD CITY HALL  
400 NO. DOUTY  
HANFORD, CA 93230

CITY CLERK  
HANFORD CITY HALL  
400 NO. DOUTY  
HANFORD, CA 93230

CITY ATTORNEY  
HAWAIIAN GARDENS CITY HALL  
21815 PIONEER BLVD.  
HAWAIIAN GARDENS, CA 90716

CITY CLERK  
HAWAIIAN GARDENS CITY HALL  
21815 PIONEER BLVD.  
HAWAIIAN GARDENS, CA 90716

CITY ATTORNEY  
HAWTHORNE CITY HALL  
4455 W. 126TH ST.  
HAWTHORNE, CA 90250

CITY CLERK  
HAWTHORNE CITY HALL  
4455 W. 126TH ST.  
HAWTHORNE, CA 90250

CITY ATTORNEY  
HEMET CITY HALL  
450 E. LATHAM AVE.  
HEMET, CA 92343

CITY CLERK  
HEMET CITY HALL  
450 E. LATHAM AVE.  
HEMET, CA 92343

CITY ATTORNEY  
HERMOSA BEACH CITY HALL  
1315 VALLEY DR.  
HERMOSA BEACH, CA 90254

CITY CLERK  
HERMOSA BEACH CITY HALL  
1315 VALLEY DR.  
HERMOSA BEACH, CA 90254

CITY ATTORNEY  
HESPERIA CITY  
15776 MAIN STREET  
HESPERIA, CA 92345

CITY CLERK  
HESPERIA CITY  
15776 MAIN STREET  
HESPERIA, CA 92345

CITY ATTORNEY  
HIDDEN HILLS CITY HALL  
6165 SPRING VALLEY RD.  
HIDDEN HILLS, CA 91302

CITY CLERK  
HIDDEN HILLS CITY HALL  
6165 SPRING VALLEY RD.  
HIDDEN HILLS, CA 91302

CITY ATTORNEY  
HIGHLAND CITY  
26985 BASE LINE  
HIGHLAND, CA 92346

CITY CLERK  
HIGHLAND CITY  
26985 BASE LINE  
HIGHLAND, CA 92346

CITY ATTORNEY  
HOLTVILLE CITY HALL  
121 W. 5TH ST.  
HOLTVILLE, CA 92250

CITY CLERK  
HOLTVILLE CITY HALL  
121 W. 5TH ST.  
HOLTVILLE, CA 92250

CITY ATTORNEY  
HUNTINGTON BEACH CITY HALL  
2000 MAIN ST.  
HUNTINGTON BEACH, CA 92648

CITY CLERK  
HUNTINGTON BEACH CITY HALL  
2000 MAIN ST.  
HUNTINGTON BEACH, CA 92648

CITY ATTORNEY  
HUNTINGTON PARK CITY HALL  
6550 MILES AVE.  
HUNTINGTON PARK, CA 90255

CITY CLERK  
HUNTINGTON PARK CITY HALL  
6550 MILES AVE.  
HUNTINGTON PARK, CA 90255

CITY ATTORNEY  
IMPERIAL CITY HALL  
420 SO. IMPERIAL AVE.  
IMPERIAL, CA 92251

CITY CLERK  
IMPERIAL CITY HALL  
420 SO. IMPERIAL AVE.  
IMPERIAL, CA 92251

CITY ATTORNEY  
INDIAN WELLS CITY HALL  
44-950 EL DORADO DR.  
INDIAN WELLS, CA 92210

CITY CLERK  
INDIAN WELLS CITY HALL  
44-950 EL DORADO DR.  
INDIAN WELLS, CA 92210

CITY ATTORNEY  
INDIO CITY HALL  
150 CIVIC CENTER MALL  
INDIO, CA 92202

CITY CLERK  
INDIO CITY HALL  
150 CIVIC CENTER MALL  
INDIO, CA 92202

CITY ATTORNEY  
INDUSTRY CITY HALL  
15651 STANFORD ST.  
CITY OF INDUSTRY, CA 91744

CITY CLERK  
INDUSTRY CITY HALL  
15651 STANFORD ST.  
CITY OF INDUSTRY, CA 91744

CITY ATTORNEY  
INGLEWOOD CITY HALL  
1 MANCHESTER BLVD.  
INGLEWOOD, CA 90301

CITY CLERK  
INGLEWOOD CITY HALL  
1 MANCHESTER BLVD.  
INGLEWOOD, CA 90301

CITY ATTORNEY  
IRVINE CITY HALL  
P. O. BOX 19575  
IRVINE, CA 92713

CITY CLERK  
IRVINE CITY HALL  
P. O. BOX 19575  
IRVINE, CA 92713

CITY ATTORNEY  
IRWINDALE CITY HALL  
5050 NO. IRWINDALE AVE.  
IRWINDALE, CA 91706

CITY CLERK  
IRWINDALE CITY HALL  
5050 NO. IRWINDALE AVE.  
IRWINDALE, CA 91706

CITY ATTORNEY  
KINGSBURG CITY HALL  
1401 DRAPER ST.  
KINGSBURG, CA 93631

CITY CLERK  
KINGSBURG CITY HALL  
1401 DRAPER ST.  
KINGSBURG, CA 93631

CITY ATTORNEY  
LA CANADA FLINTRIDGE  
300 SOUTH GRAND SUITE 1500  
LOS ANGELES, CA 90071

CITY CLERK  
LA CANADA FLINTRIDGE CITY HALL  
1327 FOOTHILL BLVD.  
LA CANADA FLINTRIDGE, CA 91011

CITY ATTORNEY  
LA HABRA CITY HALL  
CIVIC CENTER  
LA HABRA, CA 90631

CITY CLERK  
LA HABRA CITY HALL  
CIVIC CENTER  
LA HABRA, CA 90631

CITY ATTORNEY  
LA HABRA HEIGHTS CITY HALL  
1245 NO. HACIENDA BLVD.  
LA HABRA HEIGHTS, CA 90631

CITY CLERK  
LA HABRA HEIGHTS CITY HALL  
1245 NO. HACIENDA BLVD.  
LA HABRA HEIGHTS, CA 90631

CITY ATTORNEY  
LA MIRADA CITY HALL  
13700 SO. LA MIRADA BLVD.  
LA MIRADA, CA 90638

CITY CLERK  
LA MIRADA CITY HALL  
13700 SO. LA MIRADA BLVD.  
LA MIRADA, CA 90638

CITY ATTORNEY  
LA PALMA CITY HALL  
7822 WALKER ST.  
LA PALMA, CA 90623

CITY CLERK  
LA PALMA CITY HALL  
7822 WALKER ST.  
LA PALMA, CA 90623

CITY ATTORNEY  
LA PUENTE CITY HALL  
15900 E. MAIN ST.  
LA PUENTE, CA 91744

CITY CLERK  
LA PUENTE CITY HALL  
15900 E. MAIN ST.  
LA PUENTE, CA 91744

CITY ATTORNEY  
LA QUINTA CITY HALL  
P. O. BOX 1504  
LA QUINTA, CA 92253

CITY CLERK  
LA QUINTA CITY HALL  
P. O. BOX 1504  
LA QUINTA, CA 92253

CITY ATTORNEY  
LA VERNE CITY HALL  
3660 D STREET  
LA VERNE, CA 91750

CITY CLERK  
LA VERNE CITY HALL  
3660 D STREET  
LA VERNE, CA 91750

CITY ATTORNEY  
LAGUNA BEACH CITY HALL  
505 FOREST AVE.  
LAGUNA BEACH, CA 92651

CITY CLERK  
LAGUNA BEACH CITY HALL  
505 FOREST AVE.  
LAGUNA BEACH, CA 92651

CITY ATTORNEY  
LAGUNA NIGUEL CITY  
27821 LA PAZ ROAD  
LAGUNA NIGUEL, CA 92656

CITY CLERK  
LAGUNA NIGUEL CITY  
27821 LA PAZ ROAD  
LAGUNA NIGUEL, CA 92656

CITY ATTORNEY  
LAKE ELSINORE CITY HALL  
130 S. MAIN ST.  
LAKE ELSINORE, CA 92330

CITY CLERK  
LAKE ELSINORE CITY HALL  
130 S. MAIN ST.  
LAKE ELSINORE, CA 92330

CITY ATTORNEY  
LAKEWOOD CITY HALL  
5050 CLARK AVE.  
LAKEWOOD, CA 90714

CITY CLERK  
LAKEWOOD CITY HALL  
5050 CLARK AVE.  
LAKEWOOD, CA 90714

CITY ATTORNEY  
LANCASTER CITY HALL  
44933 N. FERN AVE.  
LANCASTER, CA 93534

CITY CLERK  
LANCASTER CITY HALL  
44933 N. FERN AVE.  
LANCASTER, CA 93534

CITY ATTORNEY  
LAWNDALE CITY  
611 ANTON BL., SUITE 1400  
COSTA MESA, CA 92628

CITY CLERK  
LAWNDALE CITY HALL  
14717 BURIN AVE.  
LAWNDALE, CA 90260

CITY ATTORNEY  
LEMOORE CITY HALL  
119 FOX ST.  
LEMOORE, CA 93245

CITY CLERK  
LEMOORE CITY HALL  
119 FOX ST.  
LEMOORE, CA 93245

CITY ATTORNEY  
LINDSAY CITY HALL  
251 E. HONOLULU ST.  
LINDSAY, CA 93247

CITY CLERK  
LINDSAY CITY HALL  
251 E. HONOLULU ST.  
LINDSAY, CA 93247

CITY ATTORNEY  
LOMA LINDA CITY  
11800 Central Ave, Suite 125  
CHINO, CA 91710

CITY CLERK  
LOMA LINDA CITY HALL  
25541 BARTON RD.  
LOMA LINDA, CA 92354

CITY ATTORNEY  
LOMITA CITY HALL  
24300 NARBONNE AVE.  
LOMITA, CA 90717

CITY CLERK  
LOMITA CITY HALL  
24300 NARBONNE AVE.  
LOMITA, CA 90717

CITY ATTORNEY  
LOMPOC CITY HALL  
100 CIVIC CENTER PLAZA  
LOMPOC, CA 93438



CITY CLERK  
LOMPOC CITY HALL  
100 CIVIC CENTER PLAZA  
LOMPOC, CA 93438

CITY ATTORNEY  
LONG BEACH CITY HALL  
333 W. OCEAN BLVD.  
LONG BEACH, CA 90802

CITY CLERK  
LONG BEACH CITY HALL  
333 W. OCEAN BLVD.  
LONG BEACH, CA 90802

CITY ATTORNEY  
LOS ALAMITOS CITY HALL  
3191 KATELLA  
LOS ALAMITOS, CA 90720

CITY CLERK  
LOS ALAMITOS CITY HALL  
3191 KATELLA  
LOS ALAMITOS, CA 90720

CITY ATTORNEY  
LOS ANGELES CITY HALL  
200 NO. SPRING ST.  
LOS ANGELES, CA 90012

CITY CLERK  
LOS ANGELES CITY HALL  
200 NO. Main St., Ste 1216.  
LOS ANGELES, CA 90012-4125

CITY ATTORNEY  
LYNWOOD CITY HALL  
11330 BULLIS RD.  
LYNWOOD, CA 90262

CITY CLERK  
LYNWOOD CITY HALL  
11330 BULLIS RD.  
LYNWOOD, CA 90262

CITY ATTORNEY  
MANHATTAN BEACH CITY HALL  
1400 HIGHLAND AVE.  
MANHATTAN BEACH, CA 90266

CITY CLERK  
MANHATTAN BEACH CITY HALL  
1400 HIGHLAND AVE.  
MANHATTAN BEACH, CA 90266

CITY ATTORNEY  
MARICOPA CITY HALL  
P. O. BOX 548  
MARICOPA, CA 93252

CITY CLERK  
MARICOPA CITY HALL  
P. O. BOX 548  
MARICOPA, CA 93252

CITY ATTORNEY  
MAYWOOD CITY HALL  
4319 E. SLAUSON AVE.  
MAYWOOD, CA 90270

CITY CLERK  
MAYWOOD CITY HALL  
4319 E. SLAUSON AVE.  
MAYWOOD, CA 90270

CITY ATTORNEY  
MCFARLAND CITY HALL  
401 W. KERN  
MCFARLAND, CA 93250

CITY CLERK  
MCFARLAND CITY HALL  
401 W. KERN  
MCFARLAND, CA 93250

CITY ATTORNEY  
MISSION VIEJO CITY  
25909 PALA, STE. 150  
MISSION VIEJO, CA 92691

CITY CLERK  
MISSION VIEJO CITY  
25909 PALA, STE. 150  
MISSION VIEJO, CA 92691

CITY ATTORNEY  
MONROVIA CITY HALL  
415 SO. IVY AVE.  
MONROVIA, CA 91016

CITY CLERK  
MONROVIA CITY HALL  
415 SO. IVY AVE.  
MONROVIA, CA 91016

CITY ATTORNEY  
MONTCLAIR CITY HALL  
5111 BENITO ST.  
MONTCLAIR, CA 91763

CITY CLERK  
MONTCLAIR CITY HALL  
5111 BENITO ST.  
MONTCLAIR, CA 91763

CITY ATTORNEY  
MONTEBELLO CITY HALL  
1600 BEVERLY BLVD.  
MONTEBELLO, CA 90640

CITY CLERK  
MONTEBELLO CITY HALL  
1600 BEVERLY BLVD.  
MONTEBELLO, CA 90640

CITY ATTORNEY  
MONTEREY PARK CITY HALL  
320 W. NEWMARK AVE.  
MONTEREY PARK, CA 91754

CITY CLERK  
MONTEREY PARK CITY HALL  
320 W. NEWMARK AVE.  
MONTEREY PARK, CA 91754

CITY ATTORNEY  
MOORPARK CITY HALL  
799 MOORPARK AVE.  
MOORPARK, CA 93021

CITY CLERK  
MOORPARK CITY HALL  
799 MOORPARK AVE.  
MOORPARK, CA 93021

CITY ATTORNEY  
MORENO VALLEY CITY HALL  
P. O. BOX 1440  
MORENO VALLEY, CA 92556

CITY CLERK  
MORENO VALLEY CITY HALL  
P. O. BOX 1440  
MORENO VALLEY, CA 92556

CITY ATTORNEY  
MORRO BAY CITY HALL  
DUNES ST. & SHASTA AVE.  
MORRO BAY, CA 93442

CITY CLERK  
MORRO BAY CITY HALL  
DUNES ST. & SHASTA AVE.  
MORRO BAY, CA 93442

CITY ATTORNEY  
MURIETA CITY HALL  
26442 BECKMAN CT.  
MURIETA, CA 92562

CITY CLERK  
MURIETA CITY HALL  
26442 BECKMAN CT.  
MURIETA, CA 92562

CITY ATTORNEY  
NEEDLES CITY  
817 3<sup>rd</sup> Street  
NEEDLES, CA 92363

CITY CLERK  
NEEDLES CITY  
1111 BAILEY AVE.  
NEEDLES, CA 92363

CITY ATTORNEY  
NEWPORT BEACH CITY HALL  
3300 NEWPORT BLVD.  
NEWPORT BEACH, CA 92660

CITY CLERK  
NEWPORT BEACH CITY HALL  
3300 NEWPORT BLVD.  
NEWPORT BEACH, CA 92660

CITY ATTORNEY  
NORCO CITY HALL  
3954 OLD HAMNER AVE.  
NORCO, CA 91760

CITY CLERK  
NORCO CITY HALL  
3954 OLD HAMNER AVE.  
NORCO, CA 91760

CITY ATTORNEY  
NORWALK CITY HALL  
12700 NORWALK BLVD.  
NORWALK, CA 90650

CITY CLERK  
NORWALK CITY HALL  
12700 NORWALK BLVD.  
NORWALK, CA 90650

CITY ATTORNEY  
OJAI CITY HALL  
401 SO. VENTURA ST.  
OJAI, CA 93023

CITY CLERK  
OJAI CITY HALL  
401 SO. VENTURA ST.  
OJAI, CA 93023

CITY ATTORNEY  
ONTARIO CITY HALL  
303 "B" ST.  
ONTARIO, CA 91764

CITY CLERK  
ONTARIO CITY HALL  
303 "B" ST.  
ONTARIO, CA 91764

CITY ATTORNEY  
ORANGE CITY HALL  
303 E. CHAPMAN AVE.  
ORANGE, CA 92666

CITY CLERK  
ORANGE CITY HALL  
300 E. CHAPMAN AVE.  
ORANGE, CA 92666

CITY ATTORNEY  
ORANGE COVE CITY HALL  
555 SIXTH ST.  
ORANGE COVE, CA 93646

CITY CLERK  
ORANGE COVE CITY HALL  
555 SIXTH ST.  
ORANGE COVE, CA 93646

CITY ATTORNEY  
OXNARD CITY HALL  
305 W. THIRD ST.  
OXNARD, CA 93030

CITY CLERK  
OXNARD CITY HALL  
305 W. THIRD ST  
OXNARD, CA 93030

CITY ATTORNEY  
PALM DESERT CITY HALL  
73510 FRED WARING DR.  
PALM DESERT, CA 92260

CITY CLERK  
PALM DESERT CITY HALL  
73510 FRED WARING DR.  
PALM DESERT, CA 92260

CITY ATTORNEY  
PALM SPRINGS CITY HALL  
P. O. BOX 2743  
PALM SPRINGS, CA 92263

CITY CLERK  
PALM SPRINGS CITY HALL  
P. O. BOX 2743  
PALM SPRINGS, CA 92263

CITY ATTORNEY  
PALMDALE CITY HALL  
708 EAST PALMDALE BLVD.  
PALMDALE, CA 93550

CITY CLERK  
PALMDALE CITY HALL  
708 EAST PALMDALE BLVD.  
PALMDALE, CA 93550

CITY CLERK  
PALOS VERDES ESTATES  
340 PALOS VERDES DRIVE W.  
PALOS VERDES ESTATES, CA 90274

CITY ATTORNEY  
PALOS VERDES ESTATES CITY  
300 SO. GRAND AVE., STE. 1500  
LOS ANGELES, CA 90071

CITY ATTORNEY  
PARAMOUNT CITY HALL  
16400 SO. COLORADO ST.  
PARAMOUNT, CA 90274

CITY CLERK  
PARAMOUNT CITY HALL  
16400 SO. COLORADO ST.  
PARAMOUNT, CA 90274

CITY ATTORNEY  
PARLIER CITY HALL  
1100 E. PARLIER AVE.  
PARLIER, CA 93648

CITY CLERK  
PARLIER CITY HALL  
1100 E. PARLIER AVE.  
PARLIER, CA 93648

CITY ATTORNEY  
PASADENA CITY HALL  
100 NO. GARFIELD AVE.  
PASADENA, CA 91109

CITY CLERK  
PASADENA CITY HALL  
100 NO. GARFIELD AVE.  
PASADENA, CA 91109

CITY ATTORNEY  
PASO ROBLES CITY HALL  
801 4TH ST.  
PASO ROBLES, CA 93446

CITY CLERK  
PASO ROBLES CITY HALL  
801 4TH ST.  
PASO ROBLES, CA 93446

CITY ATTORNEY  
PERRIS CITY HALL  
101 NO. "D" ST.  
PERRIS, CA 92370

CITY CLERK  
PERRIS CITY HALL  
101 NO. "D" ST.  
PERRIS, CA 92370

CITY ATTORNEY  
PICO RIVERA CITY HALL  
6615 PASSONS BLVD.  
PICO RIVERA, CA 90660

CITY CLERK  
PICO RIVERA CITY HALL  
6615 PASSONS  
PICO RIVERA, CA 90660

CITY ATTORNEY  
PISMO BEACH CITY HALL  
1000 BELLO ST.  
PISMO BEACH, CA 93449

CITY CLERK  
PISMO BEACH CITY HALL  
1000 BELLO ST.  
PISMO BEACH, CA 93449

CITY ATTORNEY  
PLACENTIA CITY HALL  
401 E. CHAPMAN AVE.  
PLACENTIA, CA 92670

CITY CLERK  
PLACENTIA CITY HALL  
401 E. CHAPMAN AVE  
PLACENTIA, CA 92670.

CITY ATTORNEY  
POMONA CITY HALL  
505 SO. GAREY  
POMONA, CA 91769

CITY CLERK  
POMONA CITY HALL  
505 SO. GAREY  
POMONA, CA 91769

CITY ATTORNEY  
PORT HUENEME CITY HALL  
250 NO. VENTURA RD.  
PORT HUENEME, CA 93041

CITY CLERK  
PORT HUENEME CITY HALL  
250 NO. VENTURA RD.  
PORT HUENEME, CA 93041

CITY ATTORNEY  
PORTERVILLE CITY HALL  
291 NO. MAIN ST.  
PORTERVILLE, CA 93257

CITY CLERK  
PORTERVILLE CITY HALL  
291 NO. MAIN ST.  
PORTERVILLE, CA 93257

CITY ATTORNEY  
RANCHO CUCAMONGA CITY HALL  
P. O. Box 807  
RANCHO CUCAMONGA, CA 91729

CITY CLERK  
RANCHO CUCAMONGA CITY HALL  
P. O. Box 807  
RANCHO CUCAMONGA, CA 91729

CITY ATTORNEY  
RANCHO MIRAGE CITY  
RANCHO MIRAGE CITY HALL  
RANCHO MIRAGE, CA 92270

CITY CLERK  
RANCHO MIRAGE CITY  
RANCHO MIRAGE CITY HALL  
RANCHO MIRAGE, CA 92270

CITY CLERK  
RANCHO PALOS VERDES  
30940 HAWTHORNE BLVD.  
RANCHO PALOS VERDES, CA 90274

CITY ATTORNEY  
RANCHO PALOS VERDES CITY  
333 SOUTH HOPE, 38TH FLOOR  
LOS ANGELES, CA 90071

CITY ATTORNEY  
REDLANDS CITY HALL  
P. O. BOX 280  
REDLANDS, CA 92373

CITY CLERK  
REDLANDS CITY HALL  
P. O. BOX 280  
REDLANDS, CA 92373

CITY ATTORNEY  
REDONDO BEACH CITY HALL  
415 DIAMOND ST.  
REDONDO BEACH, CA 90277

CITY CLERK  
REDONDO BEACH CITY HALL  
415 DIAMOND ST.  
REDONDO BEACH, CA 90277

CITY ATTORNEY  
REEDLEY CITY HALL  
845 "G" ST.  
REEDLEY, CA 93654

CITY CLERK  
REEDLEY CITY HALL  
845 "G" ST.  
REEDLEY, CA 93654

CITY ATTORNEY  
RIALTO CITY HALL  
150 SO. PALM AVE.  
RIALTO, CA 92376

CITY CLERK  
RIALTO CITY HALL  
150 SO. PALM AVE.  
RIALTO, CA 92376

CITY ATTORNEY  
RIVERSIDE CITY HALL  
3900 MAIN ST.  
RIVERSIDE, CA 92522

CITY CLERK  
RIVERSIDE CITY HALL  
3900 MAIN ST.  
RIVERSIDE, CA 92522

CITY ATTORNEY  
ROLLING HILLS CITY HALL  
#2 PORTUGUESE BEND RD.  
ROLLING HILLS, CA 90274

CITY CLERK  
ROLLING HILLS CITY HALL  
#2 PORTUGUESE BEND RD.  
ROLLING HILLS, CA 90274

CITY ATTORNEY  
ROLLING HILLS ESTS. CITY HALL  
4045 PALOS VERDES DR.  
ROLLING HILLS ESTS., CA 90274

CITY CLERK  
ROLLING HILLS ESTS. CITY HALL  
4045 PALOS VERDES DR.  
ROLLING HILLS ESTS., CA 90274

CITY ATTORNEY  
ROSEMEAD CITY HALL  
8838 E. VALLEY BLVD.  
ROSEMEAD, CA 91770

CITY CLERK  
ROSEMEAD CITY HALL  
8838 E. VALLEY BLVD.  
ROSEMEAD, CA 91770

CITY CLERK  
SAN BERNARDINO CITY HALL  
300 NO. "D" STREET  
SAN BERNARDINO, CA 92418

CITY ATTORNEY  
SAN BERNARDINO CITY HALL  
300 NO. "D" STREET  
SAN BERNARDINO, CA 92418

CITY ATTORNEY  
SAN CLEMENTE CITY HALL  
100 AVENIDA PRESIDIO  
SAN CLEMENTE, CA 92672

CITY CLERK  
SAN CLEMENTE CITY HALL  
100 AVENIDA PRESIDIO  
SAN CLEMENTE, CA 92672

CITY ATTORNEY  
SAN DIMAS CITY HALL  
245 E. BONITA AVE.  
SAN DIMAS, CA 91773

CITY CLERK  
SAN DIMAS CITY HALL  
245 E. BONITA AVE.  
SAN DIMAS, CA 91773

CITY ATTORNEY  
SAN FERNANDO CITY HALL  
117 MACNEIL ST.  
SAN FERNANDO, CA 91340

CITY CLERK  
SAN FERNANDO CITY HALL  
117 MACNEIL ST.  
SAN FERNANDO, CA 91340

CITY ATTORNEY  
SAN GABRIEL CITY HALL  
532 WEST MISSION DR.  
SAN GABRIEL, CA 91778

CITY CLERK  
SAN GABRIEL CITY HALL  
532 WEST MISSION DR.  
SAN GABRIEL, CA 91778

CITY ATTORNEY  
SAN JACINTO CITY HALL  
209 E. MAIN ST.  
SAN JACINTO, CA 92383

CITY CLERK  
SAN JACINTO CITY HALL  
209 E. MAIN ST.  
SAN JACINTO, CA 92383

CITY ATTORNEY  
SAN JUAN CAPISTRANO CITY HALL  
32400 PASEO ADELANTO  
SAN JUAN CAPISTRANO, CA 92675

CITY CLERK  
SAN JUAN CAPISTRANO CITY HALL  
32400 PASEO ADELANTO  
SAN JUAN CAPISTRANO, CA 92675

CITY ATTORNEY  
SAN LUIS OBISPO CITY HALL  
990 PALM STREET  
SAN LUIS OBISPO, CA 93401

CITY CLERK  
SAN LUIS OBISPO CITY HALL  
990 PALM ST.  
SAN LUIS OBISPO, CA 93401

CITY ATTORNEY  
SAN MARINO CITY HALL  
2200 HUNTINGTON DR.  
SAN MARINO, CA 91108

CITY CLERK  
SAN MARINO CITY HALL  
2200 HUNTINGTON DR.  
SAN MARINO, CA 91108

CITY ATTORNEY  
SANGER CITY  
1700 7TH STREET  
SANGER, CA 93657

CITY CLERK  
SANGER CITY  
1700 7TH STREET  
SANGER, CA 93657

CITY ATTORNEY  
SANTA ANA CITY HALL  
22 CIVIC CENTER PLAZA  
SANTA ANA, CA 92701

CITY CLERK  
SANTA ANA CITY HALL  
22 CIVIC CENTER PLAZA  
SANTA ANA, CA 92701

CITY ATTORNEY  
SANTA BARBARA CITY HALL  
DE LA GUERRA PLAZA  
SANTA BARBARA, CA 93102

CITY CLERK  
SANTA BARBARA CITY HALL  
DE LA GUERRA PLAZA  
SANTA BARBARA, CA 93102

CITY ATTORNEY  
SANTA CLARITA CITY  
23920 VALENCIA BLVD., #300  
SANTA CLARITA, CA 91355

CITY CLERK  
SANTA CLARITA CITY  
23920 VALENCIA BLVD., #300  
SANTA CLARITA, CA 91355

CITY ATTORNEY  
SANTA FE SPRINGS CITY HALL  
11710 TELEGRAPH RD.  
SANTA FE SPRINGS, CA 90670

CITY CLERK  
SANTA FE SPRINGS CITY HALL  
11710 TELEGRAPH RD.  
SANTA FE SPRINGS, CA 90670

CITY ATTORNEY  
SANTA MARIA CITY HALL  
110 EAST COOK ST.  
SANTA MARIA, CA 93454

CITY CLERK  
SANTA MARIA CITY HALL  
110 EAST COOK ST.  
SANTA MARIA, CA 93454

CITY ATTORNEY  
SANTA MONICA CITY HALL  
1685 MAIN ST.  
SANTA MONICA, CA 90401

CITY CLERK  
SANTA MONICA CITY HALL  
1685 MAIN ST.  
SANTA MONICA, CA 90401

CITY ATTORNEY  
SANTA PAULA CITY HALL  
970 VENTURA ST.  
SANTA PAULA, CA 93060

CITY CLERK  
SANTA PAULA CITY HALL  
970 VENTURA ST.  
SANTA PAULA, CA 93060

CITY ATTORNEY  
SEAL BEACH CITY HALL  
211 8TH ST.  
SEAL BEACH, CA 90740

CITY CLERK  
SEAL BEACH CITY HALL  
211 8TH ST.  
SEAL BEACH, CA 90740

CITY ATTORNEY  
SELMA CITY HALL  
1814 TUCKER ST.  
SELMA, CA 93662

CITY CLERK  
SELMA CITY HALL  
1814 TUCKER ST.  
SELMA, CA 93662

CITY ATTORNEY  
SHAFTER CITY HALL  
336 PACIFIC AVE.  
SHAFTER, CA 93263

CITY CLERK  
SHAFTER CITY HALL  
336 PACIFIC AVE.  
SHAFTER, CA 93263

CITY ATTORNEY  
SIERRA MADRE CITY HALL  
232 W. SIERRA MADRE BLVD.  
SIERRA MADRE, CA 91024

CITY CLERK  
SIERRA MADRE CITY HALL  
232 W. SIERRA MADRE BLVD.  
SIERRA MADRE, CA 91024

CITY ATTORNEY  
SIGNAL HILL CITY HALL  
2175 CHERRY AVE.  
SIGNAL HILL, CA 90806

CITY CLERK  
SIGNAL HILL CITY HALL  
2175 CHERRY AVE.  
SIGNAL HILL, CA 90806

CITY ATTORNEY  
SIMI VALLEY CITY HALL  
3200 COCHRAN ST.  
SIMI VALLEY, CA 93065

CITY CLERK  
SIMI VALLEY CITY HALL  
3200 COCHRAN ST.  
SIMI VALLEY, CA 93065

CITY ATTORNEY  
SOLVANG CITY HALL  
P. O. BOX 107  
SOLVANG, CA 93464

CITY CLERK  
SOLVANG CITY HALL  
P. O. BOX 107  
SOLVANG, CA 93464

CITY ATTORNEY  
SOUTH EL MONTE CITY HALL  
1415 SANTA ANITA DR.  
SOUTH EL MONTE, CA 91733

CITY CLERK  
SOUTH EL MONTE CITY HALL  
1415 SANTA ANITA DR.  
SOUTH EL MONTE, CA 91733

CITY ATTORNEY  
SOUTH GATE CITY HALL  
8650 CALIFORNIA AVE.  
SOUTH GATE, CA 90280

CITY CLERK  
SOUTH GATE CITY HALL  
8650 CALIFORNIA AVE.  
SOUTH GATE, CA 90280

CITY ATTORNEY  
SOUTH PASADENA CITY HALL  
1414 MISSION STREET  
SOUTH PASADENA, CA 91030

CITY CLERK  
SOUTH PASADENA CITY HALL  
1414 MISSION STREET  
SOUTH PASADENA, CA 91030

CITY ATTORNEY  
STANTON CITY HALL  
7800 KATELLA ST.  
STANTON, CA 90680

CITY CLERK  
STANTON CITY HALL  
7800 KATELLA ST.  
STANTON, CA 90680

CITY ATTORNEY  
TAFT CITY HALL  
209 E. KERN ST.  
TAFT, CA 93268

CITY CLERK  
TAFT CITY HALL  
209 E. KERN ST.  
TAFT, CA 93268

CITY ATTORNEY  
TEHACHAPI CITY HALL  
115 SO. ROBINSON ST  
TEHACHAPI, CA 93561

CITY CLERK  
TEHACHAPI CITY HALL  
115 SO. ROBINSON ST  
TEHACHAPI, CA 93561

CITY ATTORNEY  
TEMECULA CITY  
P. O. BOX 9033  
TEMECULA, CA 92589-9033

CITY CLERK  
TEMECULA CITY  
P. O. BOX 9033  
TEMECULA, CA 92589-9033

CITY ATTORNEY  
TEMPLE CITY CITY HALL  
9701 LAS TUNAS  
TEMPLE CITY, CA 91780

CITY CLERK  
TEMPLE CITY CITY HALL  
9701 LAS TUNAS  
TEMPLE CITY, CA 91780

CITY ATTORNEY  
THOUSAND OAKS CITY HALL  
2100 E. THOUSAND OAKS BLVD.  
THOUSAND OAKS, CA 91362

CITY CLERK  
THOUSAND OAKS CITY HALL  
2100 E. THOUSAND OAKS BLVD.  
THOUSAND OAKS, CA 91362

CITY ATTORNEY  
TORRANCE CITY HALL  
3031 TORRANCE BLVD.  
TORRANCE, CA 90503

CITY CLERK  
TORRANCE CITY HALL  
3031 TORRANCE BLVD.  
TORRANCE, CA 90503

CITY ATTORNEY  
TULARE CITY  
1220 W. MAIN ST.  
VISALIA, CA 93291

CITY CLERK  
TULARE CITY  
411 E. KERN AVE.  
TULARE, CA 93274

CITY ATTORNEY  
TUSTIN CITY HALL  
300 CENTENNIAL WAY  
TUSTIN, CA 92680

CITY CLERK  
TUSTIN CITY HALL  
300 CENTENNIAL WAY  
TUSTIN, CA 92680

CITY ATTORNEY  
UPLAND CITY HALL  
460 NO. EUCLID AVE.  
UPLAND, CA 91786

CITY CLERK  
UPLAND CITY HALL  
460 NO. EUCLID AVE.  
UPLAND, CA 91786

CITY ATTORNEY  
VENTURA CITY HALL  
P. O. BOX 99  
VENTURA, CA 93002

CITY CLERK  
VENTURA CITY HALL  
P. O. BOX 99  
VENTURA, CA 93002

CITY ATTORNEY  
VERNON CITY HALL  
4305 SANTA FE AVE.  
VERNON, CA 90058

CITY CLERK  
VERNON CITY HALL  
4305 SANTA FE AVE.  
VERNON, CA 90058

CITY ATTORNEY  
VICTORVILLE CITY HALL  
14343 CIVIC DRIVE  
VICTORVILLE, CA 92392

CITY CLERK  
VICTORVILLE CITY HALL  
14343 CIVIC DRIVE  
VICTORVILLE, CA 92392

CITY ATTORNEY  
VILLA PARK CITY HALL  
17855 SANTIAGO BLVD.  
VILLA PARK, CA 92667

CITY CLERK  
VILLA PARK CITY HALL  
17855 SANTIAGO BLVD.  
VILLA PARK, CA 92667

CITY ATTORNEY  
VISALIA CITY HALL  
707 W. ACEQUIA ST.  
VISALIA, CA 93291

CITY CLERK  
VISALIA CITY HALL  
707 W. ACEQUIA ST.  
VISALIA, CA 93291

CITY ATTORNEY  
WALNUT CITY HALL  
21201 LA PUENTE RD.  
WALNUT, CA 91789

CITY CLERK  
WALNUT CITY HALL  
21201 LA PUENTE RD.  
WALNUT, CA 91789

CITY ATTORNEY  
WASCO CITY HALL  
764 "E" STREET  
WASCO, CA 93280

CITY CLERK  
WASCO CITY HALL  
764 "E" STREET  
WASCO, CA 93280

CITY ATTORNEY  
WEST COVINA CITY HALL  
1444 W. GARVEY AVE.  
WEST COVINA, CA 91790

CITY CLERK  
WEST COVINA CITY HALL  
1444 W. GARVEY AVE.  
WEST COVINA, CA 91790

CITY CLERK  
YUCAIPA CITY  
34272 YUCAIPA BLVD.  
YUCAIPA, CA 92399

CITY CLERK  
WEST HOLLYWOOD CITY HALL  
8611 STA. MONICA BLVD.  
WEST HOLLYWOOD, CA 90069

CITY ATTORNEY  
WESTLAKE VILLAGE CITY HALL  
4373 PARK TERRACE DR.  
THOUSAND OAKS, CA 91361

CITY CLERK  
WESTLAKE VILLAGE CITY HALL  
4373 PARK TERRACE DR.  
THOUSAND OAKS, CA 91361

CITY ATTORNEY  
WESTMINSTER CITY HALL  
8200 WESTMINSTER AVE.  
WESTMINSTER, CA 92683

CITY CLERK  
WESTMINSTER CITY HALL  
8200 WESTMINSTER AVE.  
WESTMINSTER, CA 92683

CITY ATTORNEY  
WESTMORLAND CITY HALL  
355 SO. CENTER ST.  
WESTMORLAND, CA 92281

CITY CLERK  
WESTMORLAND CITY HALL  
355 SO. CENTER ST.  
WESTMORLAND, CA 92281

CITY ATTORNEY  
WHITTIER CITY HALL  
13230 PENN ST.  
WHITTIER, CA 96062

CITY CLERK  
WHITTIER CITY HALL  
13230 PENN ST.  
WHITTIER, CA 96062

CITY ATTORNEY  
WOODLAKE CITY HALL  
350 NO. VALENCIA BLVD.  
WOODLAKE, CA 93286

CITY CLERK  
WOODLAKE CITY HALL  
350 NO. VALENCIA BLVD.  
WOODLAKE, CA 93286

CITY CLERK  
YORBA LINDA CITY HALL  
4845 CASA LOMA AVE.  
P. O. BOX 87014  
YORBA LINDA, CA 92686

CITY ATTORNEY  
YORBA LINDA CITY HALL  
RUTAN & TUCKER, 611 ANTON BL.  
COSTA MESA, CA 92626

CITY ATTORNEY  
YUCAIPA CITY  
34272 YUCAIPA BLVD.  
YUCAIPA, CA 92399

# **Appendix E**

## **PRG Assessment**



**Peer Review Group Assessment of  
Southern California Gas Company's  
Proposed 2006 – 2008 Energy Efficiency Portfolio**

**Submitted to the California Public Utilities Commission**

Prepared by the  
Joint Southern California Edison/Southern California Gas Company Peer  
Review Group:

Devra Bachrach, Natural Resources Defense Council  
Peter Lai, Energy Division, CPUC  
Michael Messenger, California Energy Commission  
Cynthia Mitchell, Consultant for The Utility Reform Network  
Christine Tam, Office of Ratepayer Advocates, CPUC

June 1, 2005

## **Executive Summary**

The Joint Southern California Edison (SCE)/Southern California Gas Company (SoCalGas) Peer Review Group (PRG) respectfully submits to the California Public Utilities Commission (Commission) its assessment SoCalGas' proposed 2006-08 Energy Efficiency Portfolio of Programs plan.

This Joint SCE/SoCalGas PRG's assessment is based on draft versions of SoCalGas' proposed 2006-08 Portfolio of Energy Efficiency Programs Plan provided to the group by SoCalGas as of May 18, 2005. It contains an extensive summary of the information provided by SoCalGas portfolio administrators during the last three months of the energy efficiency planning process. Since then, SoCalGas continued to revise its portfolio beyond the date that the PRG began its assessment. Some of the observations or recommendations included in this assessment may not reflect SoCalGas' revisions to its portfolio after May 18, 2005 that SoCalGas' files on June 1, 2005.

We have attempted to include language in this assessment that reflects a consensus opinion, however, due to time constraints in writing this report, all members retain their right to submit individual comments to the Commission, or to provide recommendations to the Commission that are either outside of the scope of this assessment, or that differ from certain items or recommendations included herein.

During our discussions, we decided to create a placeholder or bin for recommendations drafted by PRG members that were not supported by all of the PRG members. Appendix E contains a listing of these recommendations that in some cases are designed to shake up the status quo and stimulate new lines of thought.

The Commission is expecting SoCalGas to more than double the annual therm savings achieved by its efficiency programs over a five-year period from 10 million therms/year in 2004 to 24 million therms/year in 2008. In the longer term, the utility is expected to triple its 2004 saving levels over the next ten years to 35.8 million therms/year in 2013. This PRG believes that SoCalGas' near-term program investments in advanced technologies and strategies are likely to contribute to SoCalGas meeting its longer-term savings goals.

This PRG believes that in the near term, for the 2006-08 cycle, SoCalGas' draft portfolio is likely to cost-effectively meet the Commission's targets. We find that the utility has maintained an adequate emphasis on programs with a proven track record of delivering savings, in addition to proposing innovative programs. Moreover, SoCalGas has built an adequate margin of error into its forecasted savings, although the margin of error is not large enough to make us entirely confident in its ability to meet the goals. In this assessment, we discuss our findings based on our review of SoCalGas' draft program portfolio plans, and provide our recommendations to ensure that SoCalGas will meet the Commission's near-term energy saving targets.

We believe SoCalGas has done a credible job of planning to produce a significant increase in likely future program savings. Throughout the PAG process, SoCalGas has done an

admirable job in reaching out to the effected private sector stakeholders to solicit input and recommendations. SoCalGas was responsive to a number of PAG recommendations to expend resources and make investments in the future. The utility has proposed to invest heavily in programs that are aimed at achieving long-term savings, but has provided little if any quantification of the savings opportunities. We are also concerned that SoCalGas has not devoted sufficient funds or programs to harvest the potential savings in the industrial sector and for the water heating end use in the residential and small commercial sectors. SoCalGas should continue to work with its PAG/PRG to jointly develop a vision of how to achieve the Commission's goals over next decade, and jointly develop strategies to get there.

One area that may have been shortchanged in the planning process was the exchange of information related to utility plans for running statewide programs with similar but not identical program designs. In D.05-01-055, the Commission directed the IOUs to form subgroups of their PAG members to closely collaborate and coordinate on statewide programs that cut across the IOU service territories. As part of statewide coordination, the Commission instructed PAGs and IOUs to collaborate on statewide program designs and implementation strategies that increasingly integrate energy efficiency with demand response and distributed generation offerings to end-users. While the IOUs have begun the process of addressing statewide coordination issues, the PRG believes that the process is far from complete. Generally speaking, the four IOUs appear to be developing two rather different approaches to IOU-implemented EE in their respective proposed portfolios. This may have lead to some of the confusion and inability to focus sooner and more clearly on statewide matters. Given the lack of discussion in coordinating statewide program designs, the PRG is unable to provide a meaningful assessment at this point. We recommend that the Commission direct the IOUs to continue the discussion with their PAG members and among themselves related to achieving similar designs and qualifying criteria for statewide programs.

The PRG generally supports SoCalGas's competitive bid plan, including the budget split between targeted and innovative program solicitations, the selected areas for targeted solicitations and SoCalGas's stated plan to consider replacing programs within the portfolio filed on June 1, 2005 if competitively bid programs can improve upon them. However, SoCalGas proposed a 2006 budget for 3<sup>rd</sup> party programs that represents 18.5% of the total portfolio budget when including the EM&V budget, and 20% of the total portfolio budget when excluding the EM&V budget. Based on D.05-01-055, the competitive bid requirement is stated as "a minimum of 20% of funding for the entire portfolio" (p. 83). Given the Decision's language, we recommend that the Commission require SoCalGas to adjust the budget for competitive bids to comply with the 20% minimum bidding requirement, with the EM&V funding included in the total portfolio budget.

The Commission asked the IOUs and their advisory groups to discuss and potentially recommend fund-shifting rules to govern what process, if any, the administrators should follow when shifting funds between programs over the next three years. In general, the PRG members support fund-shifting flexibility that will enable the utilities to meet the Commission's savings targets. We encourage the utilities to make use of this flexibility to

adjust the portfolio as market circumstances change and as it gauges the relative success of the programs within the portfolio. We also recognize that there may be situations when it would be necessary for the utility to quickly shift funds away from programs that are having difficulty meeting their savings goals without having to wait two to three months for Commission approval. However, some limits on fund-shifting flexibility may be desirable since (1) some of the program details, including cost-effectiveness information, remain vague, and in particular, we wish to ensure that utilities maintains an appropriate balance between programs that will provide near-term and long-term savings, and (2) there might be a tendency for some administrators to shift funds away from programs providing longer-term savings towards program focused solely on harvesting savings in the short-term. The PRG discussed two potential fund-shifting policies, but was not able to reach consensus on a recommendation to the Commission. We, therefore, outline the two options that the PRG discussed in Appendix I.

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## Introduction

By CPUC Decision (D.) 05-01-055, dated January 27, 2005, the Commission adopted an administrative structure for post-2005 energy efficiency programs that returns to the states' investor-owned utilities (IOUs) the lead role in program choice and portfolio management functions. With this new structure, the Commission also adopted quality control measures to ensure that the IOU program administrators select programs and manage them in a manner consistent with the Commission's objectives. The Commission directed the IOUs established an advisory group structure as safeguards against the potential for bias in the IOUs' program selection and portfolio management. The Commission envisions the advisory groups as a means to (1) promote transparency in the program administrator's decision-making process; (2) provide a forum to obtain valuable technical expertise from stakeholders and non-market participants; (3) encourage collaboration among stakeholders; and (4) create an additional venue for public participation.

The Commission directed the IOUs to establish three "Program Advisory Groups, or PAGs" drawing from the energy efficiency expertise of both market and non-market participants across the full spectrum of program areas and strategies. One PAG should be established for Pacific Gas & Electric Company's service territory, one for San Diego Gas & Electric Company's service territory, and one for the combined service territories of SCE/SoCalGas (Joint SCE/SoCalGas). The PAGs serve to provide guidance to the IOUs regarding region-specific customer and program needs, and provide a forum for input and collaboration with the local interests and stakeholders served by the programs.

Within each PAG, the Commission directed the IOUs to identify and select a subgroup of non-financially interested members with extensive energy efficiency expertise that are willing to serve as peer reviewers in their program planning and selection process. These subgroups are referred to as "Peer Review Groups (PRGs)." The Commission specified Energy Division to chair the PRG. The Joint SCE/SoCalGas PRG consists of the following representatives:

- Devra Bachrach, Natural Resources Defense Council (NRDC)
- Peter Lai, CPUC Energy Division (ED)
- Michael Messenger, California Energy Commission (CEC)
- Cynthia Mitchell, Consultant for The Utility Reform Network (TURN)
- Christine Tam, CPUC Office of Ratepayer Advocates (ORA)

As defined in D.05-01-055, the role of the PRG includes:

- a. Members of each PRG will participate in the ongoing PAG process.
- b. Review the IOUs' submittals to the Commission and assess the IOUs' (1) overall portfolio plans, (2) their plans for bidding out pieces of the portfolio per the minimum bidding requirement, (3) the bid evaluation criteria utilized by the IOUs, and (4) their application of that criteria in selecting third-party programs.

- c. The three PRGs are also expected to meet and assess the statewide portfolio (represented by the combination of the four IOUs separate portfolios) in terms of its ability to meet or exceed short and long-term savings goals in compliance with the Commission's policy rules.

The Joint SCE/SoCalGas PRG held three meetings (on April 5, April 20, and May 11, 2005) with the utilities to review and discuss the utilities' (1) overall portfolio plans, and (2) their plans for bidding out pieces of the portfolio per the minimum bidding requirement. During these meetings, the Joint PRG defined the assessment tasks, developed assessment criteria balancing cost effectiveness with other potential objectives, applied the criteria to the utility's proposed plan, identified strengths and weaknesses, and crafted a set of recommendations to enhance the proposed programs, portfolio, and third party process. Additionally the respective three PRGs met on a statewide level on March 10, and April 27, 2005 to discuss data expectations from the IOUs upon which the PRG assessment will be based.

This Joint SCE/SoCalGas PRG's assessment is based on draft versions of SoCalGas' proposed 2006-08 Portfolio of Energy Efficiency Programs Plan provided to the group by the utility as of May 18, 2005. Since then, the utility continued to revise its portfolio beyond the date that the PRG began its assessment. Some of the observations or recommendations included in this assessment may not reflect SoCalGas' revisions to its portfolio after May 18, 2005 that it files on June 1, 2005. Wherever possible, we have included language in this assessment that reflects a consensus opinion. All members retain their right to submit individual comments to the Commission, or to provide recommendations to the Commission that are either outside of the scope of this assessment, or that differ from certain items or recommendations included herein.

Our review of SoCalGas' proposed portfolio of energy efficiency programs plan includes (a) handouts provided at the PAG and PRG meetings, (b) our observations of how the administrators conducted these public meetings, and (c) Preliminary Program Application filings documents listed in Appendix A.

## **Criteria**

The Joint SCE/SoCalGas PRG established and provided both utilities in a memorandum dated April 14, 2005 a set of criteria that it used to evaluate their portfolio of energy efficiency programs to be submitted on June 1, 2005. The criteria are specific to the evaluation of SCE's and SoCalGas' portfolios, but are generally consistent with those proposed by other PRGs. Our criteria, listed in shorthand below, represent the PRGs' top priority criteria for assessing SoCalGas' portfolio, and are not intended to be a comprehensive list of criteria for the Commission's evaluation. A full explanation of each criteria and their impact of the ability to reach the Commission's savings goals are presented in the Appendix B.

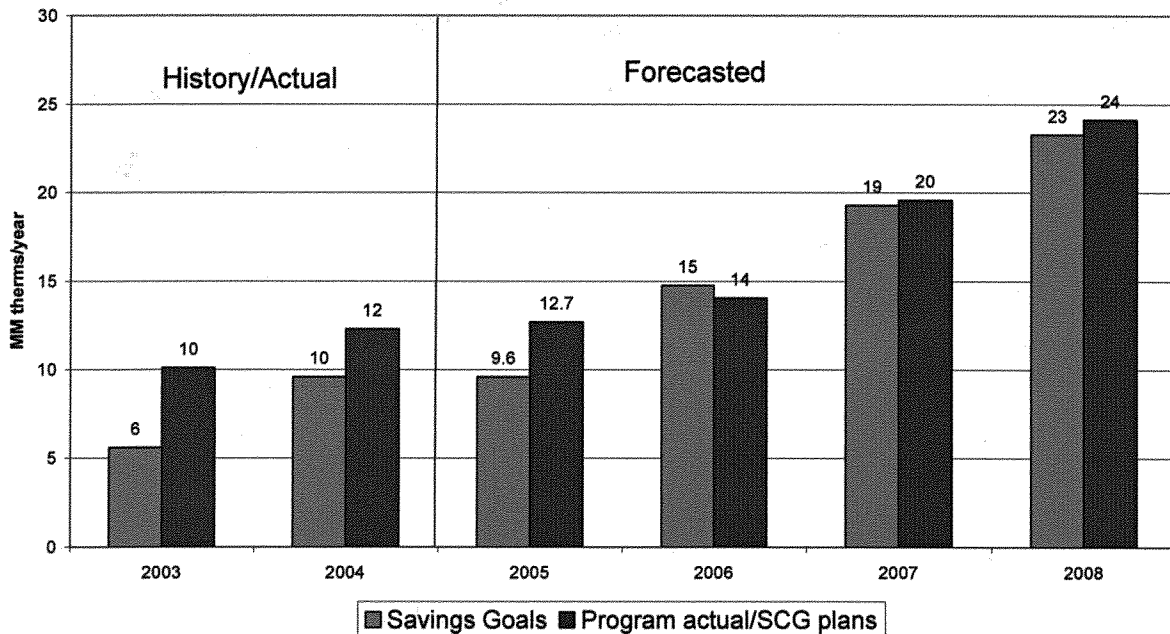
1. Vision to Motivate Employees and Contractors and outline strategies to get there.
2. Clear Statement of Program Goals
3. Flexibility to Redeploy Resources to Meet Goals
4. Diversification of Program Approaches to reduce risks of not Meeting savings goals
5. Leadership to Engage Stakeholders
6. Promote and Reward Innovation
7. Integration of EE opportunities with demand response and renewable options
8. Reward Excellence
9. Leverage Program and Private Sector Efforts
10. Strategy to Meet Long-term Savings Targets
11. Best Program Implementation
12. Coordination of program implementer efforts
13. Develop and Implement a Continuous Improvement Plan
14. Compliance with Policy Rules and other Commission directives
15. Responsiveness to the Green Building Initiative Executive Order

## **Likelihood That the Proposed Portfolio Will Meet Short-Term Savings Goals**

The Commission is expecting CoCalGas to more than double its annual therm savings achieved by its efficiency programs over a five-year period from 10 million therms/year in 2004 to 24 million therms/year in 2008. By 2013 annual program savings will need to triple to reach to 35.8MM therms/year goal adopted by the Commission. Figure 1 illustrates the steady progress made by SoCalGas in meeting these goals. SoCalGas has met its goals in each of the last 3 years by a significant margin. This section focuses on the probability that SoCalGas proposed program efforts would meet the 2006 to 2008 goals shown in this figure.



**Figure 1**  
**Comparison of SCG Energy Efficiency Program achievements**  
**vs CPUC savings goals- 2003 to 2008**



The PRG concludes that in the near term, for the 2006-08 cycle, SoCalGas' proposed portfolio is likely to cost-effectively meet the Commission's targets. We find that SoCalGas has maintained an adequate emphasis on programs with a proven track record of delivering savings (in addition to proposing innovative programs, as we discuss below). Moreover, SoCalGas has built an adequate margin of error into its forecasted savings, although the margin of error is not large enough to make us entirely confident in SoCalGas' ability to meet the goals. In this section, we discuss our findings based on our review of SoCalGas' draft application, and provide our recommendations to ensure that SoCalGas will meet the Commission's near-term energy saving targets.

1. SoCalGas' draft plan shows that they plan to almost reach the CPUC's goals based on its core programs. This core estimate excludes the energy savings from the partnership programs, the non-utility run programs selected through competitive solicitations, and the savings from the low-income efficiency programs. Assuming the partnerships deliver about 800,000 therms/yr and the low-income programs deliver 950,000 therms/yr (as SoCalGas has indicated), and assuming that the third party programs are slightly less cost-effective on average than the total portfolio (due to an increased emphasis on innovation) and that they deliver about 2.2 million therms, we estimate that SoCalGas should have a 6% margin of error in meeting the Commission's goal. While this provides a reasonable "buffer," it is not so large that we feel entirely confident in the utility's ability to meet the Commission's goals.

**Recommendation**– The Commission should encourage its staff and parties to evaluate SoCalGas’ application to ensure that the additional savings from partnerships, low-income efficiency programs, and the targeted savings for the third party programs will provide an adequate margin of error to ensure that SoCalGas is able to meet the Commission’s goals even if unforeseen circumstances arise. The PRG and SoCalGas should work to ensure that the third party programs selected through the competitive bid provide at least the targeted level of savings.

2. Five of the programs proposed by SoCalGas provide the vast majority of the portfolio’s near-term gas savings: the Local Business Energy Efficiency Program, Express Efficiency, Savings By Design, and the Single Family and Multi Family Rebate programs. And just the first two of these programs provide more than half of the portfolio’s savings. As such, the utility’s success at meeting the goals will hinge on the success of these programs. Since these programs all have a proven track record, we are relatively confident in SoCalGas’s ability to meet the targets. In addition, we note that SoCalGas’s portfolio appropriately targets the industrial sector, an area with large remaining cost-effective potential. However, SoCalGas proposes to expand the Local Business Energy Efficiency Program to more than double the size of the program in the 04-05 cycle. While the program has some new elements that will contribute to additional savings, we are concerned that the prescriptive element of the program may overlap with the Express Efficiency program, and it is unclear how these two programs will be coordinated; it may be a challenge for this program to meet its targets.

**Recommendation**– SoCalGas, the PAG/PRG, and the Commission should closely monitor the interim results from the top five programs (in terms of savings), and in particular the Local Business Energy Efficiency and Express Efficiency programs to ensure that they are on track to meet their goals.

3. In its draft application, SoCalGas reports a TRC benefit cost ratio of 1.14 and a PAC ratio of 1.29. While these numbers would appear not to afford much margin for error, we are confident SoCalGas’ portfolio will be cost-effective for two reasons. First, these ratios are calculated using the entire budget but only part of the savings (as we discussed above, the savings for the partnerships and third party programs are not included). Second, the Commission’s new avoided costs will likely improve the cost-effectiveness ratios. Although we are confident that the overall portfolio is cost-effective, the PRG is concerned that the portfolio’s ratio of administrative costs to total costs at 25%, may be too high.

**Recommendation**- SoCalGas should carefully monitor the cost-effectiveness ratios of the mix of programs in its application and periodically (perhaps semi-annually) report back on any anticipated TRC changes to the PRG and PAG as the many assumptions and variables that feed into these calculations are revised to ensure that the portfolio remains cost-effective. Within the next three months, SoCalGas should meet with representatives of the Energy Division and/or PRG to help explain why its administrative costs are so high and are important to achieving its energy savings goals.

## **Likelihood That the Proposed Portfolio Will Meet Long-Term Savings Goals**

As explained earlier, The Commission is expecting SoCalGas to more than double the annual therm savings achieved by its efficiency programs over a five-year period from 10 million therms/year in 2004 to 24 million therms/year in 2008. In the longer term, the utility is expected to triple the 2004 saving levels over the next ten years to 35.8 million therms/year. This review focuses on how SoCalGas near-term program investments in advanced technologies and strategies are likely to contribute to meeting the longer term savings goals. These goals ramp up from 27 Million therms/year in 2009 to 35.8 million therms/year in 2013.

To achieve the increases in long-term annual energy savings discussed above, we believe that the SoCalGas administrators should be developing a portfolio plan that includes the following components:

1. A vision or strategy of how to mobilize internal staff and the energy efficiency community to get from current savings levels to a 100% increase in savings for each market sector.
2. A clear statement of program goals and how progress toward these goals will be tracked over the next three years.
3. Strong Leadership that can guide and motivate the diverse elements of the energy efficiency delivery infrastructure into a coordinated effort to achieve common goals
4. A commitment to develop and implement innovative programs including new technologies and program approaches.
5. A plan to reward excellence for those customers, implementers and evaluators that contribute to reaching the savings goals.
6. A strategy to meet the long term savings targets (2009-2013) that clearly identifies near term program expenditures expected to yield significant savings in the outer years even though they will not contribute any significant reported savings in the short term.
7. An analysis of the risk of relying on specific technologies or strategies to achieve the bulk of the energy savings goals and a plan to diversify this risk.
8. A discussion of how the proposed programs will seek to leverage the resources of state and national energy organizations pursuing similar energy savings goals.
9. A plan to continuously improve program designs offerings to maximize the usefulness of ongoing tracking and evaluation studies.
10. A commitment from the highest levels of company management to “make it happen” by requesting the appropriate amount of program funding.

This section of the PRG report reviews the portfolio plans filed by So Cal Gas on May 9, 2005 and updated on May 16<sup>th</sup>, 2005 to determine if some or all of the elements listed

above are discussed and or completed in their plans.

#### A. Vision and Strategy-

“Vision is where tomorrow begins, for it expresses what you and others who share your vision will be working hard to create. Since most people don't take the time to think systematically about the future, those who do, and who base their strategies and actions on their visions, have inordinate power to shape the future. “

--Burt Nanus, author of Visionary Leadership

We believe SoCalGas has done a credible job of planning to produce a significant increase in likely future program savings. Throughout the PAG process, the utility has done an admirable job in reaching out to the effected private sector stakeholders to solicit input and recommendations. It was responsive to a number of PAG recommendations to expend resources and make investments in the future. For example, SoCalGas has proposed to search for new program ideas through its innovative Portfolio for the Future. In addition, it has proposed to invest heavily in programs that are aimed at achieving long-term savings. We estimate that 48% of the its program budget is planned to produce long term savings including Advanced Home Program, Codes and Standards, Emerging Technologies, On-bill Financing, Sustainable Communities, and Savings By Design. From a customer perspective, SoCalGas has committed to make it easier for customers to participate by developing online program applications and electronic databases of qualifying equipment. Furthermore, SoCalGas is experimenting with new approaches to incenting customers beyond the use of rebates. Promising approaches include community recognition, green certification and customized tracking of industrial process improvements

#### Positive signs of vision and leadership from SoCalGas observed to date-

1. SoCalGas has successfully partnered with SCE to bring a number of programs that save both gas and electricity to dual fuel customers with more than one service utility: These include the Advanced Home program, Savings by Design, Home Energy Surveys and Non residential surveys.
2. SoCalGas has developed programs designed to leverage the energy star and LEED benchmarks.
3. SoCalGas has spearheaded the effort to aggressively analyze and pursue opportunities to reduce gas usage in heating water.
4. SoCalGas proposes to further integrate its program offerings with municipal electric utilities to reach more customers and make it easier for them to participate.
5. SoCalGas Committed to make it easier for customers to participate by developing on line program application forms and electronic databases of qualifying equipment.
6. SoCalGas is experimenting with new approaches to motivating customers to invest in efficiency beyond just rebates. Promising approaches include community

recognition, green certification and developing customized tracking of the bottom line impacts of industrial process improvements

7. SoCalGas has developed several sets of interim milestones for key programs that will provide administrators with feedback they need to move funds to the programs that are “working”.
8. SoCalGas plans to partner with a number of organizations including CMTA, Association of Energy Engineers, US DOE and CEC to increase the breadth and scope of its program offerings in the industrial sector. Particularly important since 60% of economic potential for savings is in this sector.
9. SoCalGas is working cooperatively with SCE to field an ambitious Sustainable Communities program.
10. SoCalGas has adopted more sophisticated market segmentation strategies designed to target high-use customers, customers in pre-1970 homes, and rural home and small business owners in its audit programs;

Missing Component from the SoCalGas Plan that suggest or leave room for improvement:

1. Strategic Thinking- The challenges posed by the Commission’s accelerated savings goals require administrators to think differently about reaching out and engaging customers in the future. As we recommended during the planning process, SoCalGas needs to simultaneously increase:
  - i. its program’s reach to customers (breadth) and
  - ii. the level of the energy savings achieved per customer once contacted (depth) and
  - iii. the probability that these customers will maintain current savings and come back to SoCalGas or its representatives to achieve additional savings in future programs (repeat customers)

The PRG feels it is critical to develop quantitative metrics for each of these three objectives that will allow SoCalGas (and others) to judge if their programs are reaching new market entrants, or if they are achieving greater savings per customers (i.e., percent savings on bills) or if last years customers are becoming repeat customers. (i.e., percent of customers participating this year who have participated in any program over the last five years)

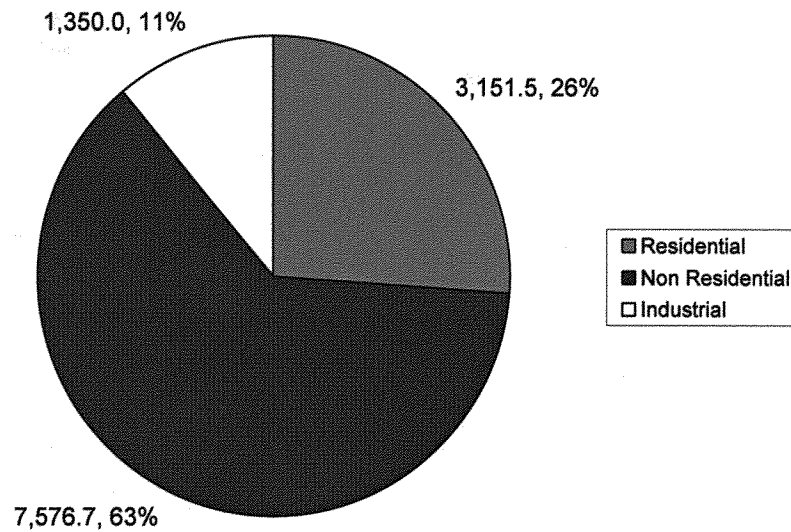
**Recommendation 1-** We recommend that SoCalGas work with its PAG to develop metrics that will allow them to track their progress in reaching a greater number of customers, at greater savings, and with a greater probability they will contact SoCalGas program reps again when making energy related investments. Representatives from the Flex Your Power organization and evaluation consultants should be asked to provide or help brainstorm metrics related to market reach, depth, and repeat business by attending these workshops.

2. Match of Proposed Program Plans to previous Estimates of Natural gas Savings potential

Figures 2 and 3 contrast estimates of economic potential from the Kema-Xenergy potential studies with SoCalGas' estimate of the savings to be achieved by their plan at the sector level. This review suggests SoCalGas program plans are not well matched to areas of potential identified in the Kema-Xenergy reports.

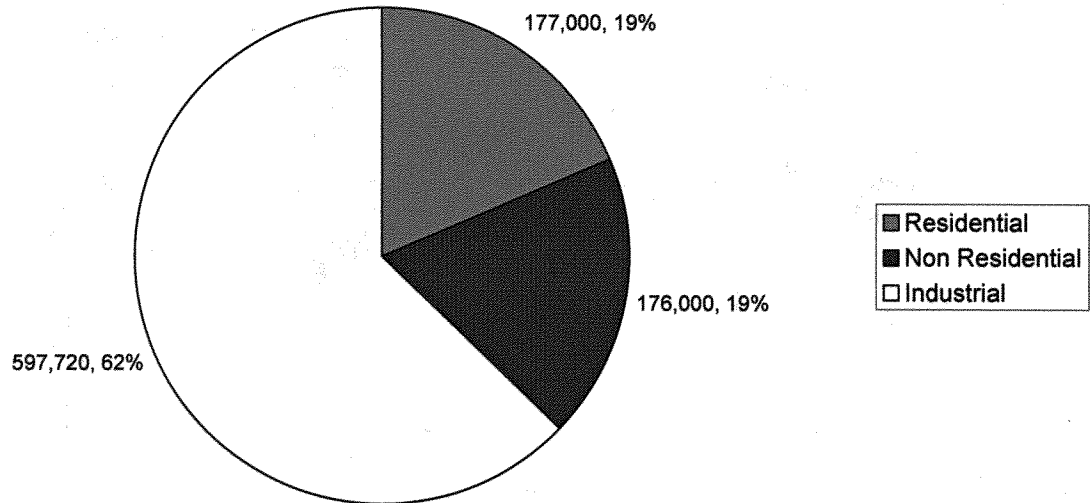
Figure 2

Program Savings by Sector  
Mmtherms/yr % of total



**Figure 3**

Economic Potential to save Natural Gas in SCG area  
MM therms/yr and % of total



These figures suggest that the SoCalGas portfolio may be over-weighted to achieving savings in the residential sector while under investing in programs in the industrial sector. SoCalGas is devoting only 11% of its funds to the industrial sector to capture 15% of the total portfolio savings when the Kema-Xenergy study suggests that fully 62% of the potential to save energy at a cost lower than supply options resides in the industrial sector.

We note that there is some possibility that SoCalGas has lumped some industrial savings measures into its non-residential program measures but we still think this difference between economic potential and program targeting deserves to be more fully discussed.

**Recommendation 2-** SoCalGas should meet and confer with its PRG/PAG teams by July 1, 2005 to discuss whether it is desirable to move additional funds toward the industrial sector, either through shifting funds from other sector budgets or requesting additional dollars.

In addition to our concerns about the relative weight or allocation of program funding by sector, we are concerned that SoCalGas' portfolio of programs is over weighted toward producing savings from space heating applications and under investing in water

heating opportunities. For example, SoCalGas reports that it expects savings from water heating measures to account for 23% of its residential program savings but the Kema-Xenergy report completed in 2003 estimates that savings from water heating measures accounted for 58% of the potential savings in this sector for SoCalGas.<sup>1</sup> Part of the difference is that the Kema-Xenergy analysis suggested that savings from solar hot water heaters replacing natural gas fired unit was both cost effective and a significant portion of their economic potential (solar water heaters represent 16% of the residential economic savings total). Another reason may be that SoCalGas is waiting for the results from the statewide committee currently assessing technical and program opportunities to save gas and water in the near and far term.

**Recommendation 3-** The PRG continues to recommend that SoCalGas reserve additional funds to use in funding any promising program ideas and analysis that emerge from the Statewide hot water group report in mid July. SoCalGas' current hot water funding allocation of less than 10% of the program funds to an end use that represents fully 38% of natural gas usage in the residential and small commercial sectors does not on its face seem rational and in any event deserves more discussion. We recommend setting aside a funding level proportionate to the savings opportunity and then discounting this estimate in half to account for uncertainties, Since savings from water heating represent 50% of the savings potential in residential and commercial buildings, the appropriate budget would be 50% of the current budget, roughly \$20 million times 50% discount due to cost effectiveness uncertainty yields a \$5 million annual budget. SoCalGas can then pool these resources with the funds being provided by SDGE and PG&E as part of the statewide water-heating program.

### 3. Focus on Exploring, Estimating, and Tracking Future Savings Opportunities.

SoCalGas has allocated a significant amount of its budget to long-term programs but has provided little if any quantification of the savings opportunities. For example consider SoCalGas' discussion of emerging technologies program. We expected to see a more detailed list of cutting edge technology research or commercialization projects with the estimated energy savings per unit or per system application that could be achieved by if the technology was commercialized (e.g. the new technology is a certain percent more efficient than current technology). Instead SoCalGas, (and other program administrators to be fair) provided a process discussion of the numerous steps and pitfalls needed to bring an idea to fruition. Nor was there any factual data provided with respect to the success of previous technologies promoted by their 2002 or 2003 ET programs. The CPUC should expect more evidence than a promise to conduct useful research to commercialize emerging technologies before authorizing a \$6 million dollar budget.

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<sup>1</sup> Source of SoCalGas program estimates, spreadsheet from SoCalGas and ckm "SoCalGas "W heat and industrial.xls": Source of economic potential estimates – Kema Xenergy , Residential Sector potential study, July 2003



**Recommendation 4-** SoCalGas should work together with the other portfolio administrators to re-file its emerging technology program description by October 1, 2005 to include the following items:

- a. Initial list of technologies/software/services to be explored over next three years
  - b. Estimated percent increase in efficiency for the new technology, system or service relative to existing practice in a typical application
  - c. Range of estimated additional natural gas savings that could occur if the ET projects are successful- probabilistic analysis
  - d. Cost reduction goals for each technology/service if applicable.
4. Develop a Plan to Reward excellence- In early April, PRG members had requested that SoCalGas develop a plan to motivate program implementers, internal staff and contractors. In addition we suggested in a PRG memo to SoCalGas dated April 14, 2006 (Appendix B) that the utility seek to reward customers who had successfully reduced their bills through program participation with publicity and or case studies of their peers achieving success. No such plan was identified in the May 17, 2005 draft filing.

**Recommendation 5-** We look forward to working with SoCalGas to help develop a plan to reward excellence for its internal staff, third-party implementers, and trade allies in the coming weeks. The plans should be developed presented to PAG for comment and then finalized by September 1, 2005.

**Summary of Overall Vision-**

SoCalGas should continue to work with its PAG to jointly develop a vision of how to achieve the Commission's goals over next decade, and jointly develop strategies to get there. Appendix F provides an example of elements of an energy efficiency vision and how the visions might be developed and implemented in a workshop process.

**B. Clear Statement of Program Goals-**

SoCalGas has done a good job in its application of describing its short and long term goals clearly. SoCalGas over arching goals are clearly stated as shown below:

- *Achieve or exceed the energy savings targets established by the Commission*
- *Provide programs integrating energy efficiency and renewable technologies*
- *Make it easy for our customers*
- *Create innovative offerings that will develop future savings streams*
- *Ensure that residential customers have access to a comprehensive range of technologies, information sources, and incentives*

- *Involve our communities and valued service providers by developing partnerships with various communities, and by utilizing third-parties to provide innovative technologies and marketing approaches*

These five overarching goals are then followed by eight market specific goals or priorities to guide program implementation<sup>2</sup>. We commend SoCalGas for providing specific and concrete goals for selected market sectors. We suggest this process be repeated when the new information on water heating and process opportunities is brought to the PRG meetings this summer

#### C. Leadership-

*“Leadership is the art of accomplishing more than the science of management says is possible” Colin Powell*

SoCalGas exhibited strong signs of leadership in the planning process. SoCalGas recognizes that the Commission’s goals will require SoCalGas to commit itself to a multi year effort to triple its annual savings levels. Rather than criticize the goals, SoCalGas has gone out of its way to partner with a variety of different program managers and companies to achieve more savings. SoCalGas representatives appeared open to suggestions from its citizen PAG members and went out of their way to follow up on their ideas. The only problem PRG identified was a lack of SoCalGas customer representatives at PRG meetings. We were expecting SoCalGas to round up some customers and have them express their views at the PAG meetings.

**Recommendation 6-** We suggest SoCalGas consider testing some of its new program designs and strategies for the mass market in focus groups and share the results at the next quarterly PRG meeting.

- D. Plan to Stimulate and Reward Innovation- We applaud SoCalGas for proposing several innovative programs including Sustainable Communities, an On-Bill Financing Pilot, Portfolio for the Future, and Advanced Home programs. The On-Bill Pilot description from the May 17, 2005 program description could be improved by clearly stating the criteria that will be used to define pilot success, what types of measures will be financed, and what conditions must be met or exceeded before SCE will be willing or able to expand on bill financing to other sectors.

**Recommendation 7-** SoCalGas should consider creating a small subcommittee of its PAG to guide the On-Bill Pilot and provide advice on setting up reasonable research objectives and methods to improve pilot performance.

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<sup>2</sup> See Appendix B for a list of these priorities.

**Recommendation 8-** SoCalGas should increase funding for the Sustainable Communities Program. It's unclear from the write-up whether the current funding request is just for the single Santa Monica project or for a few projects over the three-year cycle. This program has a significant potential to increase long-term savings by planning for efficient use of natural resources (electricity, gas, water, materials flow) at the community level and should be emphasized further.

- E. Develop a Balance between investments designed to create additional savings opportunities in the long run and funding for short run program acquisition efforts.

Developing this balance requires an understanding of the current funding split between short and long run programs and the expected energy savings from each category. We have enough data now to estimate the funding splits but lack the data necessary to even develop a range of expected savings from spending on long-term programs. This information will be needed to achieve a balance and a strategy to get there.

We estimate that roughly 27 % of SoCalGas' budget is targeted at achieving long-term saving through programs such as Advanced Homes, Emerging Technologies and Savings By Design.<sup>3</sup> SoCalGas has chosen to devote a higher fraction of its budget toward long-term savings than other utilities (e.g. 20% for SCE). The PRG supports this decision because of the tremendous need to create more savings opportunities over the next three to five years in the SoCalGas area.

Unfortunately long run savings estimates were not provided from the following key programs:

- a. Emerging technologies
- b. Codes and Standards
- c. Many of the Partnership proposals
- d. Third party solicitations.

**Recommendation 9-** The Commission should order the administrators to provide long-term savings estimates for each of these programs before August 15, 2005 and work with its PRG/PAG members to develop such estimates. Completing this analysis will require a systematic look at the probabilities that projects within the emerging technology programs, codes and standards and other long term programs will yield savings over a three to five year time frame.

- F. SoCalGas' long-term plans should include more efforts to encourage improvements in future building efficiency standards.

This PRG supports SoCalGas' Advanced Homes Program and the concept of using a tiered approach to incent more savings, but the write-up lacks sufficient detail. If

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<sup>3</sup> This estimate is uncertain because we were unable to split marketing, training or third party budgets with any accuracy. See Appendix D see for the derivation of these estimates.

successful, this program will make it much easier to commercialize new technologies and encourage their adoption into the building standards. SoCalGas appears to be planning to rely primarily on a prescriptive approach for the Residential New Construction Program that encourages projects to take a modest, but meaningful, step beyond the state's minimum building efficiency standard. In this context, a prescriptive approach runs the danger of limiting the creativity of the marketplace to respond to the desired challenge of exceeding code.

In addition SoCalGas has proposed a relatively small budget to fund the Codes and Standards support program, \$ 300,000/year compared to \$ 1.5 million/year for SCE.

**Recommendation 10-** SoCalGas should consider increasing its three year budget for Codes and Standards Programs after meeting with CEC staff to determine if there are some important analysis projects or CASE studies needed for the next round of building standards. In addition, there should be a performance component in the Residential New Construction Program to ensure that the whole house approach is utilized.

- G. Risk Analysis- SoCalGas did a credible job in this area. In Section 3.1.8 of the portfolio plan, SoCalGas identifies the market and external risks to achieving its goals and identifies clear steps to mitigate those risks.
- H. Plan to Leverage other national and state efforts- SoCalGas produced a complete description of its effort to leverage national efforts. See section 3.1.9.
- I. Continuous Improvement and funding flexibility- Very good description of SoCalGas' continuous improvement plan.

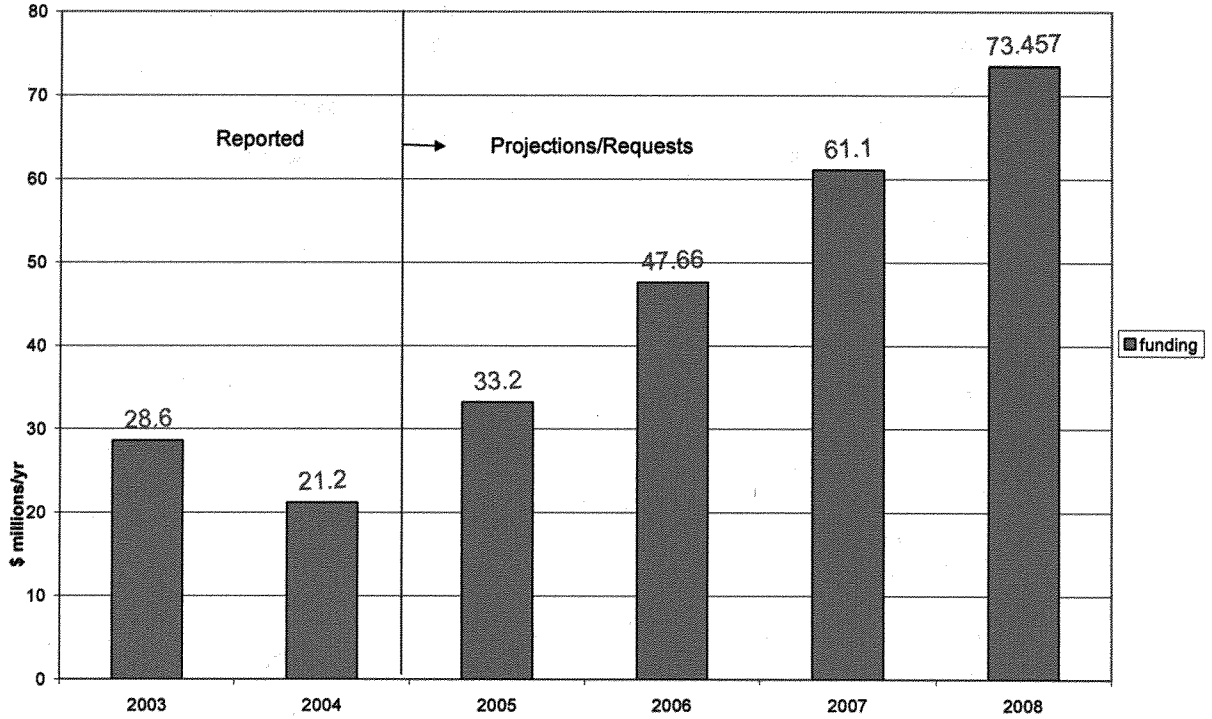
**Recommendation 11-** SoCalGas should coordinate closely with ED on ongoing changes to program design. (Also, see the section on Fund Shifting in Appendix I)

- J. Sufficient staff and funding resources to achieve long-term (2009 to 2013) savings goals.

SoCalGas appears to have requested sufficient funding to meet its long-term goal but has experienced some difficulty in spending all available funds in the last year. For example program spending dropped by 26% between 2003 and 2004. Figure 4 shows program spending over last three years and SoCalGas' request for the next three years.

Figure 4

SCG Efficiency Program funding over time



We are concerned that SoCalGas may not have enough staff to manage the significant expansion of program funding from \$22 million spent in 2004 to \$47 million planned spending in 2006 to \$73 million in 2008. This concern is particularly acute given our earlier observations that SoCalGas reports one of the highest ratios of administrative costs to total costs (25%) of all four administrators.

**Recommendation 12-** PRG members should meet with SoCalGas administrators, perhaps at next quarterly meeting, to try and understand the reasons for the 30% drop in program spending between 2003 and 2004 and the high administrative cost ratio. After this, the administrator and PRG members can determine if any steps need to be taken to increase SoCalGas' ability to deploy programs.

Table 1 below presents a summary of our overall assessment of SoCalGas' long-term portfolio plans.

Table 1  
**Overview of PRG Assessment of Portfolio Plans from SoCalGas**

| Planning Criteria   | So Cal Gas   |
|---|--------------|
| Vision & Strategy   | Satisfactory |
| Clear Program/Mkt Goals   | Excellent    |
| Strong Leadership   | Satisfactory |
| Cultivate and Reward Innovation   | Satisfactory |
| Reward Excellence in Execution  | Not Provided |
| Balance between savings potential estimates and program savings plans by sector and end use | Not Provided |
| Balance between short and long run program funding  | Satisfactory |
| Completed Risk Analysis to Increase Probability of meeting goals                            | Excellent    |
| Plan to Leverage outside resources  | Satisfactory |
| Continuous Improvement plan   | Satisfactory |
| Management Commitment to Achieve Goals  | Satisfactory |
| Likely to Meet Short Term Savings Goals   | Yes          |
| Likely to Meet Long Term Savings Goals  | Probably     |

**Guide to Understanding the Ratings**

1. Excellent- Plan exceeds expectations and will contribute to more long term savings
2. Satisfactory-Plan met our expectations and will not necessarily contribute to the long run
3. Needs improvement- Plan did not meet PRG expectations and chances of reaching savings goals will increase if administrator takes the time to pursue PRG recommendations
4. Not Provided- No information was presented in filings on this topic leading to high risk that overall long term savings goals will not be met. However PRG believes there is sufficient time to pursue and remedy these issues before the 2006 cycle begins

## Statewide Coordination

One area that may have been shortchanged in the planning process was the exchange of information related to utility plans for running statewide programs with similar but not identical program designs. In D.05-01-055, the Commission directed the IOUs to form subgroups of their PAG members to closely collaborate and coordinate on statewide programs that cut across the IOU service territories. As part of statewide coordination, the Commission instructed PAGs and IOUs to collaborate on statewide program designs and implementation strategies that increasingly integrate energy efficiency with demand response and distributed generation offerings to end-users.<sup>4</sup> While the IOUs have begun the process of addressing statewide coordination issues (two statewide PAG meetings have been held to date on April 7, 2005 and April 29, 2005), the PRG believes that the process is far from complete.

The proposed IOUs' portfolios are largely a product of regional planning and lack details on statewide coordination. Even so, Table 1 reflects that the IOUs will continue to allocate a significant portion of funds to statewide programs and rely heavily on statewide programs for the majority of savings.<sup>5</sup>

| Projected Funding by Geographical Scope (\$ millions) |           |         |             |         |            |         |          |         |
|---|-----------|---------|-------------|---------|------------|---------|----------|---------|
|   | PG&E 2006 |         | SCE 2006-08 |         | SDG&E 2006 |         | SoCalGas |         |
|   | % T       | % T     | % T         | % T     | % T        | % T     | % T      | % T     |
|   | Budget    | Savings | Budget      | Savings | Budget     | Savings | Budget   | Savings |
| Statewide   | n/a       | n/a     | 65%         | 83%     | 45%        | 47%     | 48%      | n/a     |
| Local   |           |         | 35%         | 17%     | 55%        | 53%     | 52%      |         |

| Table 1: Projected Funding by Geographical Scope (\$ millions) |           |         |             |         |            |         |          |         |
|--|-----------|---------|-------------|---------|------------|---------|----------|---------|
|  | PG&E 2006 |         | SCE 2006-08 |         | SDG&E 2006 |         | SoCalGas |         |
|  | % T       | % T     | % T         | % T     | % T        | % T     | % T      | % T     |
|  | Budget    | Savings | Budget      | Savings | Budget     | Savings | Budget   | Savings |
| Statewide  | n/a       | n/a     | 65%         | 83%     | 45%        | 47%     | 48%      | n/a     |
| Local  |           |         | 35%         | 17%     | 55%        | 53%     | 52%      |         |

PAG and PRG members have offered a plethora of suggestions on statewide activities and programs. Many of these ideas and recommendations have been picked up by the IOUs and incorporated in various places throughout their proposed portfolios. While this is a positive step forward, it still does not go to the heart of the matter, which is:

Certain fundamental aspects of economies of scale and scope in the manufacture, distribution, and purchase, of energy-using equipment and appliances call for a consistent, coordinated, and leveraged, statewide approach.

Generally speaking, the four IOUs appear to be developing two rather different approaches to IOU-implemented EE in their respective proposed portfolios. This may

<sup>4</sup> D 05-01-055 1/27/2005. *Interim Opinion on the Administrative Structure for EE: Threshold Issues*, page 93-94.

<sup>5</sup> PG&E has not yet proposed a state/local allocation; information was not provided in SoCalGas May filing.

have lead to some of the confusion and inability to focus sooner and more clearly on statewide matters.

SCE, SCG, and SDG&E are largely maintaining the existing framework of programs (with program enhancements and some new programs) defined along customer categories. (e.g. Single-family and Multifamily Retrofit Rebate Programs, Express Efficiency (small commercial) Standard Performance Contracting (larger commercial), etc. On the other hand, PG&E is in their words “blowing up all the boxes” and establishing one very large “mass market” program category, (encompasses primarily SF and MF existing, and existing Express Efficiency program, small commercial ) that will rely largely on deemed savings, with then a dozen or so programs targeted at specific market sectors and customer categories such as schools and colleges, retail stores, office buildings, medical facilities, etc. (somewhat the current Standard Performance Contracting Program niche) that will work largely with calculated savings.

Regardless of the apparent two different approaches to utility-delivered EE, (enhance existing customer-centric program categories or define new programs along market categories) certain fundamental aspects of customer approaches to energy efficiency, market opportunities for interacting with the customer, market barriers, and strategies to overcome barriers, remain.

For instance, each time consumers face a market choice involving energy use it is a golden opportunity to engage consumers in assessing energy usage and efficiency potential on a comprehensive basis, and developing plans and strategies for carrying out those improvements. The critical junctures in the marketplace to positively engage consumers, businesses, and communities in energy efficiency are:

- In the design and construction of new homes and buildings; and the manufacture and distribution of equipment and appliances.
- At the point of purchase and point of installation of equipment and appliances.
- During the retrofit and refurbishment of existing homes and businesses, and the operation and maintenance of equipment and appliances.

Given the lack of discussion in coordinating statewide program designs, the PRG is unable to provide a meaningful assessment at this point. We recommend that the Commission direct the IOUs to continue the discussion with their PAG members and among themselves related to achieving similar designs and qualifying criteria for statewide programs. Specifically we recommend the IOU's provide more details in their subsequent filing to the Commission in the following areas:

1. Statewide marketing and outreach.



The IOUs and Efficiency Partnership should submit a joint plan on statewide marketing and outreach initiatives. Currently that is a general lack of knowledge and confusion on how the IOUs local marketing and outreach efforts will integrate without duplicating or confusing statewide activities. A joint statewide plan would help mitigate these problems. The plan should address issues including: co-branding with 3<sup>rd</sup> party programs, coordination with both IOU and non-IOU program-specific marketing activities (particularly for non-resource programs), and marketing targeted at hard-to-reach segments (this includes the activities carried out by Runyon Saltzman & Einhorn and Univision Television Group funded in the 2004-05 program cycle).

## 2. Statewide manufacture, distribution, and retail programs.

A coordinated statewide manufacture, distribution, and retail program should be considered the starting point for making energy efficiency California's first loading order resource. Statewide marketing and outreach as noted above is part and parcel.

Upstream programs promote higher production levels and more aggressive distribution of high efficiency equipment through midstream contractor and downstream consumer demand. Upstream equipment and appliance efficiency programs have been practiced by many utilities throughout the country for a number of years. Through such programs, manufacturers and distributors often agree to discount the cost of higher efficiency equipment based on improved certainty of larger scale market demand. Also, but not always, manufacturers and distributors are offered financial incentives for increased production and distribution of higher efficiency equipment.

As a first step, PAG and PRG members encouraged the IOUs to develop a full menu of energy saving equipment and appliances, assess whether increasing the production and distribution of the mass market measures is most workable at the manufacturer level, distribution level, or both. It was suggested that a summary possibly in a matrix format would be helpful, along with a discussion of what works, and why and why not. The IOUs did some of this (albeit very late in the PAG process) largely demonstrating certain aspects of consistency, with coordination and market leverage, largely unaddressed.

Coordination and market leverage (exertion of market power) are concepts the IOUs are familiar with, and the PRGs hope that such advancements are happening "off line".

The IOUs should coordinate upstream programs targeting manufacturers and distributors to best leverage their combined market power. SDG&E currently plans to competitively bid out the Upstream HVAC/Motor Distributor Rebate program. It remains unclear how SDG&E and the other utilities will coordinate on the negotiations with manufacturers and distributors. Ideally, the utilities

should jointly pursue any upstream efforts, or designate a single third-party to represent all the utilities in the negotiation and implementation process.

Preliminary potentials estimates could be readily calculated working with annual sales data, assuming normal replacement or retrofit, point of sale discounts (no consumer rebate processing increasing consumer participation), and possibly varying levels of manufacturer incentives. Program design and potentials estimates should work to achieve broad retail market participation in point of sale efforts.

3. Statewide collaboration to integrate energy efficiency with demand response and distributed generation offerings to end users.

The market integration of demand-side programs is a new program concept that affects all market sectors. By exchanging ideas and soliciting comments from the PAG members, we expect that the IOUs will be able produce a more concrete strategy that delivers demand-side programs at the most cost effective manner without adding more confusion from the customer perspective.

4. Statewide Emerging Technology program planning.

The IOUs should jointly develop a detailed plan for the 2006-08 Emerging Technology program. The plan should include a target list of technologies/software/services to be explored over the next three years, estimated time to commercialize each item on the target list, as well as the range of estimated aggregate savings from the target list.

5. Statewide Codes & Standards program planning.

The IOUs should jointly develop a detailed plan for the 2006-08 Codes & Standards program. The plan should include a target list of case studies, projected timeline for adoption by the CEC, and the estimated aggregate savings.

### **Third Party Bid Solicitation Process**

The PRG reviewed SoCalGas's proposed budget for competitive solicitations, areas for targeted solicitations, process for soliciting third party bids, and criteria to evaluate the bids. SoCalGas proposed a 2006 budget for 3<sup>rd</sup> party programs that represents 18.5% of the total portfolio budget when including the EM&V budget, and 20% of the total portfolio budget when excluding the EM&V budget. Based on D.05-01-055, the competitive bid requirement is stated as "a minimum of 20% of funding for the entire portfolio" (p. 83). Given the Decision's language, we recommend that the Commission require SoCalGas to

adjust the budget for competitive bids to comply with the 20% minimum bidding requirement, with the EM&V funding included in the total portfolio budget.

Aside the 3<sup>rd</sup> party program budget, we generally support SoCalGas's competitive bid plan, including the budget split between targeted and innovative program solicitations, the selected areas for targeted solicitations and SoCalGas's stated plan to consider replacing programs within the portfolio filed on June 1<sup>st</sup> if competitively bid programs can improve upon them. Our detailed comments on SoCalGas's plan and our recommendations for improvements are discussed below.

Comments on Projected 3<sup>rd</sup> party Program Budget:

1. Within the 3<sup>rd</sup> party program budget, 76% is allocated to Targeted solicitations and 24% to the Innovative Program Idea Solicitation (refer to Appendix G for summary of SoCalGas's competitive bid plan). The PRG believes this is an appropriate balance between the areas, given that many of the Targeted programs are a result of the PAG recommendation process and represent key areas with large potential savings.
2. Within the Targeted program budget, \$2 million is allocated to the Residential HVAC upstream and midstream program, \$1 million to the Comprehensive Coin-operated commercial clothes washing replacement, and \$.55 million to the Comprehensive Water Heating replacement program (refer to Appendix H for summary of SoCalGas' targeted program solicitations). Given the energy savings potential (nearly half of the remaining potential in the residential sector is in water heating) and the scope of the Comprehensive Water Heating replacement program, which covers upstream and midstream incentives to manufacturers, distributors and contractors as well as advance technology demonstration, the PRG recommends that SoCalGas increase the funding allocation to this program.

**Recommendations:** SoCalGas should increase the funding allocation to the comprehensive Water Heating replacement program.

Comments on Areas Selected for Targeted Solicitations:

1. SoCalGas has provided a thumbnail sketch of each targeted solicitation, along with the anticipated funding level and expected energy savings. The PRG generally supports the areas identified for targeted competitive solicitations and believes that they will contribute to improvements and innovation within the portfolio. In its RFP, SoCalGas should make it clear that the brief descriptions it has provided for each competitive solicitation are very general, and that bidders should seek to improve upon them. For example, providing kiosks in the lobbies of financial institutions may not be the best way to reach the market at the time of financing or re-financing if many people conduct this business online or by phone rather than in person; bidders should be free to propose other ways to reach the same market.

**Recommendations:** SoCalGas should clarify that bidders should not limit their program design based on the proposed program description given for each targeted solicitation area.

Comments on the RFP process:

1. The PRG recommends that SoCalGas and SCE jointly solicit third party bids in as many areas as possible that can logically target both gas and electric savings. In particular, we recommend joint solicitations for the following areas as targeted solicitations: retrocommissioning and time-of-sale home inspection. By consolidating the solicitation process for these program areas, the IOU administrators will benefit from reduced administrative overhead and avoiding duplicative efforts by third parties targeting the same customers within the SoCalGas/SCE service territories.
2. Upstream rebate programs targeting manufacturers and distributors should be closely coordinated across the utilities to best leverage their combined market power. We recommend that SoCalGas separate the upstream incentive components from the Comprehensive HVAC and Water Heating programs to further refine the details of statewide coordination. Furthermore, should the utilities decide to use a 3<sup>rd</sup> party to manage the relationships with upstream market actors, there should be a single entity contracted to represent all the utilities.

**Recommendations:** SoCalGas should coordinate with SCE to jointly solicit third-party bids for local programs that target both gas and electric savings. For upstream incentive programs, SoCalGas should coordinate with the other utility administrators to ensure that there is a single entity coordinating all activities with manufacturers and distributors.

Comments on RFP schedule:

1. SoCalGas currently expects to issue the RFP in September. The PRG notes that any delays in the launch date of programs may jeopardize the ability of the program implementers to meet their program goals and may cause a delay in any future portfolio evaluation activities. To ensure that there is adequate time to select 3<sup>rd</sup> party program bids and to allow them to begin implementation by the first of the year, the PRG recommends that the Commission bifurcate its decision on this application and authorize SoCalGas to begin the RFP and bid screening process as soon as possible and prior to the Commission's approval of SoCalGas' full application.
2. In SoCalGas' proposed solicitation schedule, the utility has scheduled only one discussion with the PRG after its review of the stage two proposals. The PRG recommends that SoCalGas review its selection of stage one abstracts with the PRG prior to notifying bidders to submit full proposals.

- For the Innovative Program Idea Solicitation, SoCalGas proposed to allow the winning bidders up to two years to implement and complete their programs. However, it is unclear whether SoCalGas plans to conduct additional program solicitations beyond 2005. The PRG is supportive of a staggered solicitation schedule to encourage third parties to submit innovative program proposals throughout the program cycle. To that end, we recommend that SoCalGas conduct program solicitations in 2006 and 2007, and designate one-year contract provisions for selected programs which may be extended based on the demonstrated performance.

**Recommendations:** The PRG recommends that the Commission bifurcate its decision on SoCalGas' application and authorize SoCalGas' competitive solicitation process as soon as possible and prior to the Commission's approval of SoCalGas' full application. We further recommend that SoCalGas reviews its selection of stage one abstracts with the PRG prior to noticing the stage one selection results. The PRG also recommends that SoCalGas conduct 3<sup>rd</sup> party program solicitations in 2006 and 2007, and designate one-year contract provisions for selected programs.

Comments on the Program Solicitation Criteria:

- The PRG generally supports the weights assigned to the categories of (i) kWh and kW Potential, (ii) Cost Effectiveness, (iii) Cost Efficiencies, (iv) Program Implementation and Feasibility, (v) Program Innovation, and (vi) Minimizing Lost Opportunities for the Targeted resource and non-resource 3<sup>rd</sup> party programs. However, for the Innovative Program Idea Solicitations, we recommend that SoCalGas place more emphasis on the Program Innovation criteria. As such, the PRG recommends the weights presented in the table below:

| Criteria  | Innovative Program Idea Solicitation – Resource Programs | Innovative Program Idea Solicitation – Non-Resource Programs |
|---|--|--|
| kWh and kW Potential  | 20%  | na   |
| Cost Effectiveness (for resource programs)/ Cost Efficiencies (for non-resource programs) | 20%  | 25%  |
| Program Implementation and Feasibility  | 15%  | 15%  |
| Program Innovation  | 30%  | 45%  |
| Skill and Experience  | 10%  | 10%  |
| Minimizing Lost Opportunities   | 5%   | 5%   |

- The first stage screening process described in the draft portfolio application provided to the PRG seems to be too subjective. We recommend that the criteria that will be used in screening Stage I submissions be more explicitly defined.

3. SoCalGas's proposed bid evaluation criteria provides a detailed breakdown of the criteria it proposes to use in evaluating individual bids, and states that the utility's portfolio managers will ensure that all programs and technologies fit into its overall portfolio. This proposed bid selection process provides inadequate detail on the portfolio-level criteria SoCalGas will use to evaluate bids and assemble the final portfolio. We suggest that SoCalGas further clarify these portfolio-level criteria, such as ensuring that the portfolio is cost-effective, comprehensive, reaches a diversity of target markets, does not result in overlapping or competing programs, adequately lays the groundwork for reaching the Commission's long-term savings targets, etc.

**Recommendations:** The PRG recommends that SoCalGas modify the stage two bid evaluation criteria weights for the Innovative Program solicitations as above. Furthermore, we recommend that SoCalGas provide a more explicitly defined set of criteria for screening stage one submissions as well as clarify the stage two portfolio-level criteria.

*Comments on the Continuation of Successful Non-IOU Programs:*

1. While D.05-01-055 explicitly instructed the IOUs to continue successful non-IOU programs, there is no common definition of "success" across the IOUs in their assessment of ongoing non-IOU programs. Of the eight existing third party programs operating in its territory, SoCalGas proposed to continue only the CUWCC Pre-rinse Spray Head Installation Program. However, as of the date this PRG assessment began, SoCalGas did not have a program description for this program in its draft June 1 filing; as such, it will remain unclear as to whether this third party can reasonably expect to be part of the 2006-08 portfolio or whether it should bid into the competitive solicitations. At the same time, other programs that have met their program targets, delivered high quality work, and are deemed cost effective will need to re-bid in the 2005 solicitation process as part of SoCalGas's plan to develop more comprehensive programs. The PRG is concerned that SoCalGas did not use a sufficiently robust process to select existing programs to continue in the 2006-08 program cycle.
2. We believe that a "mainstreaming" process to move successful third-party programs into the "80%" portfolio needs to be further refined. The PRG plans to continue working with the IOUs to establish a process to move innovative programs into the core (80%) portfolio and replace existing programs with third-party programs that are more cost effective and/or comprehensive in the program approach.

**Recommendations:** SoCalGas should continue to work with the PRG to develop a more robust process to mainstream non-IOU implemented programs.

## **Fund Shifting**

The Commission asked the PRG to discuss and potentially recommend fund-shifting rules to govern what process, if any, the administrators should follow when shifting funds

between programs over the next three years. In general, the PRG members support fund-shifting flexibility that will enable the utilities to meet the Commission's savings targets. There may be situations when it would be necessary for the utility to quickly shift funds away from programs that are having difficulty meeting their savings goals without having to wait two to three months for Commission approval. However, some limits on fund-shifting flexibility may be desirable since (1) some of the program details, including cost-effectiveness information, remain vague, and in particular, we wish to ensure that utilities maintains an appropriate balance between programs that will provide near-term and long-term savings, and (2) there might be a tendency for some administrators to shift funds away from programs providing longer-term savings towards program focused solely on harvesting savings in the short-term. The PRG discussed two potential fund-shifting policies, but was not able to reach consensus on a recommendation to the Commission. We, therefore, outlined the two options that the PRG discussed in Appendix I<sup>6</sup>.

## Conclusions

We have attempted to include language in this assessment that reflects a consensus opinion, however, due to time constraints in writing this report, all members retain their right to submit individual comments to the Commission, or to provide recommendations to the Commission that are either outside of the scope of this assessment, or that differ from certain items or recommendations included herein.

The PRG concludes that in the near term, for the 2006-08 cycle, SoCalGas' draft portfolio is likely to cost-effectively meet the Commission's targets. We find that the utility has maintained an adequate emphasis on programs with a proven track record of delivering savings, in addition to proposing innovative programs. Moreover, SoCalGas has built an adequate margin of error into its forecasted savings, although the margin of error is not large enough to make us entirely confident in its ability to meet the goals. In this assessment, we discussed our findings based on our review of SoCalGas' draft program portfolio plans, and provided our recommendations to ensure that SoCalGas will meet the Commission's near-term energy saving targets.

We believe SoCalGas has done a credible job of planning to produce a significant increase in likely future program savings. Throughout the PAG process, SoCalGas has done an admirable job in reaching out to the effected private sector stakeholders to solicit input and recommendations. SoCalGas was responsive to a number of PAG recommendations to expend resources and make investments in the future. The utility has proposed to invest

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<sup>6</sup> Although Energy Division does not endorse either of the PRG recommendations, it does not wish to impinge upon the PRG's freedom to request an expanded role, or to request that it be vested with the following responsibility. However, Energy Division may deem it as part of its responsibility to advise the Commission to make a recommendation on a fund-shifting request and approval process that differs from that suggested by this PRG. Energy Division has not yet determined what the staff position will be as it has not yet reviewed the filings or yet consulted with Commission decision makers on their desired level of staff oversight of utility portfolio administration and expenditures, however ED might have concerns about the feasibility and propriety of the recommended process. Energy Division does not wish to either undermine the PRG process by seeming obstructionist or appear duplicitous.

heavily in programs that are aimed at achieving long-term savings, but has provided little if any quantification of the savings opportunities. We are also concerned that SoCalGas has not devoted sufficient funds or programs to harvest the potential savings in the industrial sector and for the water heating end use in the residential and small commercial sectors. SoCalGas should continue to work with its PAG/PRG to jointly develop a vision of how to achieve the Commission's goals over next decade, and jointly develop strategies to get there.

One area that may have been shortchanged in the planning process was the exchange of information related to utility plans for running statewide programs with similar but not identical program designs. In D.05-01-055, the Commission directed the IOUs to form subgroups of their PAG members to closely collaborate and coordinate on statewide programs that cut across the IOU service territories. As part of statewide coordination, the Commission instructed PAGs and IOUs to collaborate on statewide program designs and implementation strategies that increasingly integrate energy efficiency with demand response and distributed generation offerings to end-users. While the IOUs have begun the process of addressing statewide coordination issues, the PRG believes that the process is far from complete. Generally speaking, the four IOUs appear to be developing two rather different approaches to IOU-implemented EE in their respective proposed portfolios. This may have led to some of the confusion and inability to focus sooner and more clearly on statewide matters. Given the lack of discussion in coordinating statewide program designs, the PRG is unable to provide a meaningful assessment at this point. We recommend that the Commission direct the IOUs to continue the discussion with their PAG members and among themselves related to achieving similar designs and qualifying criteria for statewide programs.

The PRG reviewed SoCalGas' proposed budget for competitive solicitations, areas for targeted solicitations, process for soliciting third party bids, and criteria to evaluate the bids. We generally support SoCalGas' competitive bid plan. However, we recommend that the Commission require SoCalGas to adjust the budget for competitive bids to comply with the 20% minimum bidding requirement, with the EM&V funding included in the total portfolio budget. Furthermore, we recommend that SoCalGas increase the funding allocation to the comprehensive Water Heating Replacement program and coordinate with the other utilities on joint solicitation for local programs targeting both gas and electric savings as well as statewide upstream incentive programs.

The Commission asked the PRG to discuss and potentially recommend fund-shifting rules to govern what process, if any, the administrators should follow when shifting funds between programs over the next three years. In general, the PRG members support fund-shifting flexibility that will enable the utilities to meet the Commission's savings targets. The PRG discussed two potential fund-shifting policies, but was not able to reach consensus on a recommendation to the Commission. We, therefore, outlined the two options that the PRG discussed in Appendix I.



## **Appendix A**

1. SoCalGas: 2006-08 Energy Efficiency Program Concept Papers – May 9, 2005
2. SoCalGas' Portfolio Application Outline, Energy Efficiency Program Year 2006-08, provided on May 9, 2005
3. SoCalGas' Energy Efficiency Summary Tables, June 1<sup>st</sup> Filing (Excel Workbook file), revised May 16, 2005
4. SoCalGas' May 18, 2005 response to PRG's data request

## Appendix B

April 14, 2005

To: Utility Energy Efficiency Portfolio Managers  
From: Mike Messenger, CEC  
Devra Bachrach, NRDC  
Cynthia Mitchell, TURN  
Zenaida Tapawan Conway, CPUC Staff  
Peter Lai, CPUC staff  
Christine Tam, ORA

Subject: Criteria for evaluating the portfolio of energy efficiency programs to be submitted on June 1, 2005.

In the interests of full disclosure and no surprises, here are the criteria we plan to use in assessing whether the utility portfolio manager submittals on June 1<sup>st</sup>, 2005 are consistent with the Commission's energy efficiency policy goals.

1. **Vision-** The utility administrators should present a strategic vision and set 3 year stretch goals for each market segment (beyond just the quantitative energy saving goals set by the Commission) that will motivate employees, stakeholders and the regulatory community. This vision should include a thoughtful analysis of how today's emerging trends will effect program opportunities between now and 2008.
2. **Clear Statement of Program Goals-** Maximize cost effectiveness or achieve energy and peak savings goals or others? Also, the application should contain a clear description of how the programs in the portfolio will minimize lost opportunities and reflects "best practices" drawing upon experience and information to date on both IOU and non-IOU implemented programs.. In addition, the application should demonstrate that it is designed to displace or defer more costly supply-side resources by demonstrating that the portfolio of programs is cost effective.
3. **Flexibility-** Plan should contain the milestones to verify that the programs are on track to achieve savings goals and mechanisms to shift program funding as market circumstances change and evaluation results become available.
4. **Diversification of Program Savings Risk-** Discuss how the portfolio diversifies risk, and how the elements of portfolio are divided on the spectrum between "tried and true" programs and new programs to "test the waters." Provide an expected value analysis of the risks of over reliance on specific programs or measures for to achieve large portions of the portfolio savings goals. Demonstrate that the plan provides an adequate margin of error in meeting the Commission's targets, and identify the key uncertainties in savings estimates that must be confirmed over time.
5. **Leadership-** Provide evidence that portfolio managers have worked hard to bring ideas and concepts from various stakeholders and PAG members into finished program concepts within the application and bringing successful ideas from third party programs into the main stream.
6. **Innovation-** Explore end uses where energy savings have not been significant over the past ten years (e.g., gas water heaters ), new end uses (e.g., home entertainment

- systems), and new approaches (e.g., on bill financing, feedback from utility bills, and co branding).
7. **DSM Integration** - Integration of EE opportunities with demand response and renewable options as part of program delivery options.
  8. **Reward Excellence**-Define a process to develop a plan to reward excellent execution from program planners and implementers under contract to the portfolio manager.
  9. **Leverage** – Demonstrate that the portfolio is leveraging national efforts through participation with CEE, Energy Star, etc. and statewide efforts through coordination with other utilities (including municipal utilities, water utilities, etc.) and agencies (e.g. the CEC).
  10. **Strategy to Meet Long-term Targets** – Demonstrate that the portfolio “plants the seeds” for a future ramp-up in savings in order to meet the more aggressive targets beyond 2008 and capture *all* cost-effective savings. Describe the balance of long-term vs. short-term programs within the portfolio. Demonstrate that the portfolio builds the energy efficiency infrastructure to achieve greater future savings.
  11. **Best Program Implementation** – Explanation of how the areas to be competitively bid and the funding levels were chosen in order to meet the Commission’s goal of improving programs and spurring innovation.
  12. **Coordination** – Clear plan to coordinate all program implementers (both utility and non-utility) to ensure the success of the entire portfolio, and a plan to help *all* program implementers be successful.
  13. **Continuous Improvement Plan** – Outline a plan to continually improve the portfolio of programs through process evaluations, market assessments, etc. and ongoing portfolio planning and stakeholder input (i.e. the portfolio planning process should not rush now and then cease in 2006, it should be ongoing to make mid-course changes and to take the time necessary to plan an even better portfolio for 2009 and beyond).
  14. **Compliance with Policy Rules and other Commission directives** – demonstrate how the portfolio/programs comply with the policy rules (expected to be adopted on April 21) and other directives set forth in prior Commission decisions, as applicable.
  15. **Responsiveness to the Green Building Initiative Executive Order** – Demonstrate how the portfolio/programs address the goals set forth in the Executive Order with respect to improving energy efficiencies in state and commercial buildings, and informing building owners/operators about energy efficiency

Please contact Mike Messenger if you have any questions about these criteria or how we plan to apply them. Thanks.

## **Appendix C**

### **SoCalGas market level goals**

1. By 2013, SoCalGas will replace all standard coin operated laundry machines with high efficiency clothes washers and dryers.
2. By 2013, SoCalGas will perform energy efficiency surveys on every home in our service area built before 1960.
3. By 2013, every SoCalGas residential customer will have an interactive electronic assessment device that will provide real time energy consumption and site-specific energy conservation/efficiency recommendations. (Virtual Auditor).
4. By 2013, every commercial kitchen in SoCalGas ' service area will produce 20% more product for the same gas input in 2004.
5. By 2013, inefficient natural gas-related industrial plumbing designs will be eliminated.
6. By 2013, hybrid natural gas/electric space cooling systems will be a viable solution for electric-peak load reduction in the residential and small commercial segments.
7. By 2013, residential space heating energy consumption in SoCalGas' service area will be the same as that recorded in 2004.

## Appendix D

### Short and Long Run Efficiency Program Budget

|  |                               |                     |
|--|-------------------------------|---------------------|
| <b>SCG Budget and Savings</b>                    | <b>Long-term Budget</b>       | <b>\$12,832,295</b> |
| <i>source: May9DR_SCG_June1Filing(revised 5-</i> | <b>Portfolio Budget</b>       | <b>\$47,868,782</b> |
|  | <b>Long-term as Percent c</b> | <b>27%</b>          |

| Program  | Budget       | Category         |                |
|--|--------------|------------------|----------------|
| 3rd party programs   | \$8,864,589  | long-term at 50% | \$4,432,294.50 |
| SCG3501 CS4-Codes & Standards Program                          | \$300,000    | long-term        |                |
| SCG3502 EED4-Advanced Home Program                             | \$2,250,000  | long-term        |                |
| SCG3506 ETP4-Emerging Tech Program                             | \$1,000,000  | long-term        |                |
| SCG3511 NEW4-Savings By Design                                 | \$1,500,000  | long-term        |                |
| SCG SCE Program  | \$1,000,000  | long-term        |                |
| SCG3512 NEW5-Savings By Design                                 | \$1,000,000  | long-term        |                |
| SCG Muni Program   | \$1,250,000  | long-term        |                |
| SCG3514 OBF4-On-Bill Financing for Energy Efficiency Equipment | \$4,000,000  | long-term at 20% | \$800,000.0    |
| SCG3515 PP4-Partnership Programs                               | \$300,000    | long-term        |                |
| SCG3516 SCD4-Sustainable Communities Demo/City of Santa Monica | \$1,800,000  |                  |                |
| SCG3503 EET4-Education & Training Program                      | \$1,000,000  |                  |                |
| SCG3504 EMO4-Energy Efficiency Marketing & Outreach            | \$3,545,836  |                  |                |
| SCG3505 EMV4-Evaluation Measurement & Verification             | \$5,308,050  |                  |                |
| SCG3507 EXP4-Express Efficiency Rebate Program                 | \$2,013,043  |                  |                |
| SCG3508 FYP4-Flex Your Power                                   | \$600,000    |                  |                |
| SCG3509 HES4-Home Energy Efficiency Survey                     | \$2,500,000  |                  |                |
| SCG3510 MFR4-Multi-Family Rebate Program                       | \$6,137,264  |                  |                |
| SCG3513 NRF4-Local Business Energy Efficiency Program          | \$4,500,000  |                  |                |
| SCG3517 SFR4-Home Efficiency Rebate Program                    | \$47,868,782 |                  |                |
| <b>Portfolio</b>   |              |                  |                |

## Appendix E

### Recommendations from PRG members that were not universally supported by all PRG members

The following is a list of recommendations that some PRG members felt were potentially important but did not enjoy the support of all PRG members. They are reprinted because the PRG members from the CEC and TURN felt they raise interesting issues that the Program Administrator may decide to address in the short or long term. Other PRG members, including NRDC and ORA, intend to address their individual issues through their comments on the utilities' applications after June 1, 2005.

A. Promote comprehensive savings— SoCalGas should emphasize the need to achieve greater depth or a higher percentage reduction in a customer bill once they are engaged or participating in a program. The current SoCalGas program descriptions contain very little if any discussion or description of how their audit, rebate or new construction programs will encourage deeper or more comprehensive savings once at the customer site.

**Recommendation:** Explore possible approaches to encouraging more depth or comprehensive savings at the next PAG meeting. Opportunities for participating customers include routine follow up emails, visits, recognition of customers or customized feedback on energy bills after investments are made.

B. Cultivate repeat customer business- Repeat efficiency Customers are cheaper to acquire than new ones. It is an accepted fact in the business world that it is both easier and cheaper to cultivate repeat business by devoting effort to ensure customers are satisfied and have an easy way to get back in touch for future needs. This is clearly cheaper than trying to reach new customers again through mass media and marketing campaigns. In fact, satisfied customers who confirm that they have achieved bill savings are SoCalGas' best way to increase the prospects for additional long-term savings.

**Recommendation:** The portfolio administrators should make a strong effort to cultivate positive relationships with participating customers to reduce costs and to maximize word of mouth opportunities. SoCalGas should track the number of repeat customers by class in an interactive data base and report how many customers are actually repeat customers on an annual basis. In addition, SoCalGas should consider giving some form of recognition to successful efficiency customers such as handing out energy efficiency hero cards that can be used for future product discounts or contacting host utility when the customer is making their next energy related investment.

C. Financing, On- and Off-bill, as a supplement and/or alternative to rebates.

There is a strong need for low- and no-interest financing of residential and small commercial energy efficiency equipment such as HVAC and major efficiency retrofit and refurbishments as an effective mechanism to overcoming significant market barriers that exist in inducing the majority of homeowners and businesses to invest in saving energy.

Financing is also one of way to effectively address the split-incentive landlord-tenant barrier at least in the commercial sector. Energy saving measures with a payback period less than the length of the tenant's lease are ripe for financing, with additional options including the ability to transfer an existing financing contract to the next tenant.<sup>7</sup>

The new federal standards for residential central air conditioning units effective 2006 heighten the need for financing. As lower-cost (lower efficiency) units are no longer available, customers may increasingly delay replacement. Appropriate financing could prevent the decline in replacement of older, less efficiency systems.

While all the utilities to one degree or another are testing on-bill financing,<sup>8</sup> off-bill financing – part and parcel to all or most of the IOUs, third-party, and partnership energy efficiency programs and services – provides an excellent bridge as California hopefully moves closer to on-bill.

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<sup>7</sup> United Illuminating Company's *Small Business Energy Advantage*  
[http://www.uinet.com/your\\_business/sbea.asp](http://www.uinet.com/your_business/sbea.asp)

<sup>8</sup> In D. 04-09-060 September 23, 2004 *Interim Opinion: Energy Savings Goals for Program Year 2006 and Beyond*, the CPUC directed the IOUs to submit proposals for on-bill financing. Page 34: "For this purpose, we encourage the program administrator(s) to aggressively develop program design options during the next program cycle that will address major barriers to energy efficiency deployment. We expect program administrator(s) to submit for our consideration an analysis of a wide range of promising options to remove barriers to rapid energy efficiency deployment, including on-bill financing of energy efficiency measures. In doing so, program administrator(s) should look to the practices used in other states to resolve the ratemaking, cost allocation and consumer protection issues raised by the parties in this proceeding regarding on-bill financing."

## **Appendix F**

### **An example of an Energy Efficiency Vision and Questions to Explore at a Visioning Workshop**

1. Customers routinely seek to confirm the gas savings achieved from previous programs by looking at their monthly bill, or asking the utility to perform a quick confirmation analysis and return it via email or asking for an automatic verification check from their new interval meter
2. Small and large business owners track the energy component of their monthly expenses through simple benchmarking programs and compete to be best in the trades.
3. Utilities set up self sustaining web sites where customers rate the quality of major contractor installation jobs and allow skilled home doctors to flourish.
4. Tradable carbon market makes it profitable for SoCalGas to sell their savings to other countries and stimulates a “brain drain” of efficiency experts to the Far East.
5. Large industrial customers routinely consult with portfolio administrators when they are considering major plant retrofits or relocation to new areas.

#### Questions to Explore at Visioning Workshops

1. What are the key trends in micro-electronics and how are they likely to effect opportunities for energy savings in the future?
2. How will the installation of interval meters affect program opportunities to save energy?
3. What are key trends in natural gas intensive process industry and how will they affect program savings opportunities?
4. What will be the effect on programs of the eventual downturn in home sales in next three years?
5. What will be the impact of move toward decentralized or renewable generation sources on savings opportunities for SoCalGas? Will more waste heat be available in urban areas?



## Appendix G

### Summary of SoCalGas' plan for competitive bidding

| Third-party bid category             | Projected Budget | Bid Rationale   | Bid Schedule |
|--------------------------------------|------------------|---|--------------|
| Targeted *                           | \$6,770,000      | SoCalGas believes all areas of the portfolio should gain from competitive bidding to meet the continuous innovation and improvement objectives. Furthermore, the selected 3P programs should conform to SoCalGas' seven long range EE priorities. | Unspecified  |
| Innovative Program idea Solicitation |                  | Patterned after SCE's IDEEA program, this is a general solicitation to seek new program designs that may include commercialization/ demonstration projects for emerging technologies that have a potential for cost-effective energy savings.     | Unspecified. |
| Total 3P program budget **           | \$8,864,589      |   |              |
| SoCalGas 2006-08 Portfolio           | \$47,868,782     |   |              |

\*source for Targeted 3P program budget: SoCalGas program concept papers submitted on 5/9

\*\*source for Total 3P program budget: "May9DR\_SoCalGas\_June1Filing(revised 5-16).xls"

## Appendix H

### Summary of SoCalGas's Third-Party Target Program Solicitations

| <b>Program Name</b>   | <b>Program Budget*</b> | <b>Bid Amount *</b> | <b>Bid rationale*</b>  |
|---|------------------------|---------------------|--|
| Affordable Housing innovative outreach and measure installation   | \$250,000              | 150,000 thms        | Hard-to-reach segment. EE measures will excl. HVAC measures.   |
| Mobile/manufactured home innovative outreach and measure installation   | \$250,000              | 150,000 thms        | Hard-to-reach segment within the residential market  |
| Residential upstream central heating replacement, and midstream duct testing and sealing and quality installation assurance | \$2,000,000            | 800,000 thms        | SoCalGas does not have the expertise and resources in-house to execute a comprehensive HVAC program; complements the SCE program (SCE program targets customers with both central heating and A/C; SoCalGas program targets customers with central heating only) |
| Residential Advanced Home Remodeling/Renovation   | \$500,000              | 200,000 thms        | Complements the residential new construction program   |
| School-Based Residential Energy Efficiency  | \$200,000              | 160,000 thms        | School-based education is not addressed in the SCT portfolio   |
| Used Equipment Education and Incentive Program  | \$100,000              | n/a                 | Education program targeting foodservice equipment vendors and customers  |
| Small-Medium Industrial Customer Process Improvement  | \$120,000              | 30,000 thms         | Target small-medium sized industrial customers that have been underserved  |
| Comprehensive Coin-operated commercial clothes washing replacement  | \$1,000,000            | 700,000 thms        | Specialized niche market for energy and water savings  |
| Comprehensive/ innovative upstream/ midstream/ downstream water heating replacement   | \$550,000              | 400,000 thms        | Need to expand approach to reach upstream and midstream market actors.   |
| Portfolio of the Future   | \$500,000              | n/a                 | Seek to incorporate advanced technologies into existing programs and to develop new programs for these technologies  |
| Energy Efficiency Finance-Kiosk Pilot   | \$300,000              | n/a                 | Energy Efficiency mortgages or loan programs targeting at homeowners and small businesses  |

|  |           |              |  |
|--|-----------|--------------|--|
| Energy Efficiency Equipment Exchange program | \$500,000 | 350,000 thms | A clearing house to connect potential buyers and sellers of used equipment that meet minimum EE standards. |
| Energy Efficient Ethnic Outreach Program     | \$500,000 | n/a          | Increase outreach to ethnic communities via CBO, FBO, and other venues.                                    |

## Appendix I

### Fund-shifting

The Commission asked the PRG to discuss and potentially recommend fund-shifting rules to govern what process, if any, the administrators should follow when shifting funds between programs over the next three years. In general, the PRG members support fund-shifting flexibility that will enable the utilities to meet the Commission's savings targets. There may be situations when it would be necessary for the utility to quickly shift funds away from programs that are having difficulty meeting their savings goals without having to wait two to three months for Commission approval. However, some limits on fund-shifting flexibility may be desirable since (1) some of the program details, including cost-effectiveness information, remain vague, and in particular, we wish to ensure that utilities maintains an appropriate balance between programs that will provide near-term and long-term savings, and (2) there might be a tendency for some administrators to shift funds away from programs providing longer-term savings towards program focused solely on harvesting savings in the short-term. The PRG discussed two potential fund-shifting policies, but was not able to reach consensus on a recommendation to the Commission; we outline the two options that the PRG discussed below.

#### **Option A:**

The Commission, and other parties with more of a long-term focus, may be the only effective advocate for maintaining funding for programs with a long-term focus, particularly if administrators are having difficulty meeting some of their short-term savings objectives. To guard against the tendency for administrators to shift funds from programs designed to achieve long run savings to short term programs that are short of their annual goals, we suggest that the Commission itself must approve any proposed reduction for long-term programs that exceeds 10% of the program budget. Administrator's requesting such a shift would have to file an advice letter and obtain Commission approval .

All other proposed fund shifting during the three-year planning cycle, either between programs within sectors or across sectors, would require notification of both the PRG and the Energy Division and a short comment process with each utilities' PRG, but would not require Commission action. Party comments on fund shifts would automatically become part of the next earnings assessment process that parties would be given the opportunity to show, after the fact, the impact of any fund shifting that they opposed. This step of linking administrator actions and comments on them to actual savings results will ultimately make the administrators more accountable for their actions. We believe administrators should remain open to suggestions from PRG members about the timing and wisdom of funding shifts AND should be held accountable for their funding allocation choices during the assessment of whether or not the Commission's savings goals have been met and the recommendation below attempts to strike this balance.

Recommendation:

The utility should consult with the PRG at least 15 days prior to any significant shifts in program funding. We define a fund-shifting to be **significant** if it exceeds any of the threshold criteria listed below.

- Fund shifting among programs exceeds 25% OR \$8.5 million of the initial authorized program budget, whichever is less, on an annual basis.
- Fund shifting among programs exceeds 50% on a cumulative basis.
  - Approved budget for codes and standards, emerging technologies, statewide marketing and outreach, or EM&V is reduced by more than 1%.
  - The percent of portfolio funding allocated to non-utility implementers falls below the Commission's mandated 20% for a calendar year.
  - Proposed Implementation of a new program outside of the competitive solicitation process.

Recall that any proposed funding reduction in the budget of any long-term program (See Appendix D for the list) in excess of 90% would automatically trigger an advice letter process.

Fund shifting actions below these thresholds would not trigger the need to notify or consult with the PRG, or the Energy Division.

Significant funding shifts would require the utility to notify PRG members of the proposal by email and request comments in no less than 15 days from the date of the email. The comments should clearly state whether the PRG member is supportive of the shift, against the funding shift, or simply wants more information. The administrator would then have the responsibility to review these comments and decide if there was a need for either a follow up phone call or meeting to discuss the comments before moving ahead with the proposed action. After making this decision and pursuing any necessary follow ups, the administrator should notify all of the PRG members and the Energy Division of their final fund shifting decision and append a summary of the comments received on this item.

As much as possible, the utility's consultations with the PRG on potential fund shifts should occur at quarterly meetings, but the utility would not be precluded from bringing items to the PRG at other times using means of communication such as e-mail, conference calls, or meetings. At the quarterly PRG meetings, the utility should review the status of the programs and the portfolio with the advisory group, and discuss any funds shifted within that period.

A summary of the funding shift actions taken and the comments received on them should

be made available on an annual basis to all parties and the CPUC when it is reviewing each administrator's savings achievements as part of the annual AEAP. Parties will be allowed to comment, if they want to, on the wisdom or propriety of any fund shifting actions taken by the administrator and explicitly address if the actions taken were consistent with achieving the commission's short- or long-term savings goals. The Commission then would be free to take any action it wanted, if they were convinced that the fund shifting actions taken were not consistent with their policy directions.

In this way, portfolio administrators can be held accountable for the results or consequences of their fund shifting decisions within the context of what Commission should really care about: achievement of the short- and long-term energy savings goals. This process avoids both the need to construct an elaborate advice letter process and the delays that may occur in the process of securing commission approval for fund shifting proposals. In sum we believe fund-shifting decisions should be the administrator's responsibility. The best way to evaluate if the administrators are making the "proper" fund shifting decisions is to examine their impact on the bottom line, energy savings achieved in the short and long run.

Consistent with the process outlined above, this option encourages the Commission to grant the utility full flexibility in administering a portfolio of programs to meet or exceed the Commission's energy saving targets. It encourages the utilities to make use of this flexibility to adjust the portfolio as market circumstances change and as it gauges the relative success of the programs within the portfolio. It encourages the portfolio administrators to take advantage of its PRG to receive input on program design changes and to continue the collaborative process it has begun in the past few months.

### **Option B:**

With a few exceptions (notably Codes and Standards, Emerging Technologies, EM&V, relative IOU versus non-IOU funding), the utilities has proposed unlimited fund shifting flexibility. In general, the PRG members support fund-shifting flexibility that will enable utilities to meet the Commission's savings targets. However, limits on fund-shifting flexibility are required since some of the program details, including cost-effectiveness information, remain vague, and in particular, we wish to ensure that utilities maintains an appropriate balance between programs that will provide near-term and long-term savings.

### Recommendation:

If any of the thresholds listed below are reached, utilities should consult with the PRG at least 15 days prior to its proposed action. If the PRG is in consensus with the utility regarding the action, then no formal PUC process is needed (other than complying with the Commission's reporting requirements). **If such consensus is not reached by the PRG, then the utility should file an advice letter.** Prompt action on the advice letter by the PUC is absolutely essential to ensure that the utility is able to use its best judgment as portfolio administrator to meet the savings goals for which the Commission will hold the utility accountable and upon which its resource portfolio managers are relying. This

process would be triggered if the utility's proposed action exceeds the following thresholds:

- Administrative costs exceed 105% of the approved costs at the portfolio level.<sup>[1]</sup>
- Fund shifting among programs exceeds 25% OR \$8.5 million, whichever is less, on an annual basis.
- Fund shifting among programs exceeds 50% on a cumulative basis.
- Funding for codes and standards, emerging technologies, statewide marketing and outreach, or EM&V is reduced.
- The percent of portfolio funding allocated to non-utility implementers falls below 20%.
- Implementation of a new program outside of the competitive solicitation process.

As much as possible, the utility's consultations with the PRG should occur at quarterly meetings, but utilities would not be precluded from bringing items to the PRG at other times using means of communication such as e-mail, conference calls, or meetings. At the quarterly PRG meetings, utilities should review the status of the programs and the portfolio with the advisory group, and discuss any funds shifted within that period.

Other than the guidelines outlined above, the PRG encourages the Commission to grant utilities full flexibility in administering a portfolio of programs to meet or exceed the Commission's energy saving targets. We encourage utilities to make use of this flexibility to adjust the portfolio as market circumstances change and as it gauges the relative success of the programs within the portfolio. We encourage utilities to take advantage of its PAG and PRG to receive input on program design changes and to continue the collaborative process it has begun in the past few months.

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<sup>[1]</sup> By "administrative costs" we refer to true administrative costs, rather than the definition of administrative costs used in the TRC test.