**UCAN Data Requests in A.14-11-003, Set 2**

**UCAN Data Requests in A.14-11-003, Set 1**

Date: March 24, 2015

Responses

Due: April 3, 2015

To: SDG&E

John Pacheco

From: UCAN

 Don Kelly

 3405 Kenyon Street, Suite 401

 San Diego, CA 92110

 (619) 610-9001

Data Request No: 2

(Please see instructions below)

**INSTRUCTIONS:**

Pursuant to rule 10.1 of the California Public Utilities Commission’s Rules of Practice and Procedure UCAN hereby submits this data request for information from SDG&E. If you will be unable to meet the above deadline, or need to discuss the content of this request, please call UCAN counsel at the number(s) shown above before the due date.

If you are unable to provide the information by the due date, have an objection to any request, or plan to assert a privilege to any request, please provide a written explanation to UCAN’s counsel seven calendar days before the due date as to why the response date cannot be met and your best estimate of when the information can be provided.

If you are asserting an objection or privilege please provide the specific nature of that objection or privilege claimed and the facts upon which such claim is based. If any document is redacted, please clearly identify and describe any information that is redacted from the document and provide an explanation for the redaction. Please identify the person who provides the response and his (her) phone number. Provide electronic responses if possible.

If a document is available in Word or Excel format, do not send it as a PDF file. All data responses need to have each page numbered, referenced, and indexed so worksheets can be followed. If any number is calculated, include a copy of all electronic files so the formula and their sources can be reviewed.

These data requests shall be deemed continuing in nature so that you shall produce any additional or more current information that come to your attention after your initial responses have been sent up to the time of hearing or settlement.

1. SDG&E’s 10-K was filed on February 26, 2015. Please provide updated responses to the following questions from UCAN Data Request-001: 16-18, 48-50, 54-55.

**The following questions relate to Mr. Baugh’s testimony for SDG&E (SDG&E-14)**

1. Regarding SDG&E response to UCAN Data Request-001 Question 36b:
	1. Has SDG&E investigated the possibility of allowing payment processing via credit and debit card at all APL locations? If so, please summarize the results of the investigation, including any plans for expanding options for credit and debit card payment.
	2. Please describe the barriers to allowing payment processing via credit and debit card at all APL locations.
	3. For each APL location that currently does not allow payment processing via credit and debit card, please provide the date (if any) at which these payment options will start to be accepted.
2. Regarding SDG&E’s response to UCAN Data Request-001 Question 14:
	1. Please provide all reports and documentation resulting from the four in-person focus groups that were conducted on the bill redesign project.
	2. Please provide a copy of all questionnaires and other materials provided to the focus group participants.
3. Regarding the Bill Redesign project:
	1. Please provide the total expenditure to date on the bill redesign project including costs for all focus groups, surveys and other efforts.
	2. Please provide a detailed breakdown of (i) past and (ii) forecasted expenditures for the bill redesign project by general category including: focus groups, customer studies, bill design, implementation, etc. Please expand on this list of categories as appropriate.

**The following questions relate to Mr. Schiermeyer’s testimony for SDG&E (SDG&E-31)**

1. Please provide a copy of all of the data tables and charts included in Mr. Schiermeyer’s workpapers in electronic format. If Excel workpapers are unavailable please provide the data tables as .csv files or in some other electronically readable format.
2. Please provide the STATA/SAS/other statistical software code used to develop the electric customer forecast in .txt or similar format that enables copying and pasting.
3. Please provide the log file generated during SDG&E’s completion of the electric customer forecast in .txt or similar format that enables copying and pasting.
4. Please provide a qualitative step-by-step description of the electric customer model that is outlined on page 3 of the workpapers. Please clearly indicate the order of the steps to be taken to complete SDG&E’s analysis.
5. For each numerical value on page 3 of the workpapers, please indicate the source of the value including the mathematical steps required to derive the value.
6. The documentation on page 3 of Mr. Schiermeyer’s workpapers appears to indicate that customer counts for tariffs PA, PATOU, CUST\_ALTOUI, PAT1, A6TOU are held constant over the forecast period. Is this correct? If so please explain the reason for this approach and provide supporting documentation. If not, please clarify the customer count forecast approach for these customer classes.
7. Regarding SDG&E’s response to UCAN Data Request-001 question 25a:
	1. Please explain why SDG&E used a 5-year historic period for the growth rate forecast for those customer classes whose growth rates were forecasted using an exponential trend.
	2. Please specify whether SDG&E considered using a longer historic period for these forecasts. If so, please explain why SDG&E chose not to use a longer historic period for these forecasts.
	3. If SDG&E assessed growth rate projections for any of these customer classes based on longer historic periods, please provide the results of these projections and explain why these projections were rejected in favor of the projections used in this application.
8. Please provide monthly customer count data for all tariffs defined in SDG&E’s Electric Customer Model from December 1993 to present.
9. Please explain why SDG&E forecasted LS-2 customer counts based on residential customer count growth but forecasted LS-1 and LS-3 customer counts using an exponential trend approach.
10. Please explain SDG&E’s methodology for completing the customer forecast for EPEVL, EPEVM and EPEVH.
11. When was the Domestic Experimental Plug-In Electric Vehicle Service tariff established, when was it open to customers, and will the tariff be open to new customers throughout the GRC period?
12. Please provide monthly customer counts for all Domestic Experimental Plug-In Electric Vehicle Service tariff customers since the opening of the tariff.
13. Regarding SDG&E’s Original and Supplemental Responses to UCAN Data Request-001 Questions 26-28:
	1. SDG&E has indicated that the variable “HUSTS\_SDGE” used in its model is based on the IHS variable “Housing Starts, Total Private” modified to include the small portion of Orange County, CA that is included in SDG&E’s service territory. Please explain the methodology SDG&E uses to modify the “Housing Starts. Total Private” data to account for SDG&E’s Orange County service area.
	2. Please provide updated values for “HUSTS\_SDGE” for each quarter 2014-2018 based on the “Housing Starts, Total Private” data provided in SDG&E’s supplemental response.
	3. Please describe the relationship between “HUSTS\_7320” in SDG&E’s model and the IHS variable “Housing Starts, Total Private.”
	4. Please provide updated values for “HUSTS\_7320” for each quarter 2014-2018 based on the “Housing Starts, Total Private” data provided in SDG&E’s supplemental response.
	5. In the supplemental response the “Housing Starts, Total Private” data is listed quarterly but the Units are described as “Annual Rates, SA.” Please indicate the method for converting these units to quarterly rates.
	6. SDG&E has indicated that the variable “HH\_7320” is based on census year data from the California Department of Finance. Please provide the source data from the California Department of Finance that SDG&E relied on and please describe any modifications that were made to the Department of Finance data to arrive at the final values for HH\_7320. Please provide information on the exact source of the Department of Finance data including publication name and date.
14. Please provide the full set of historic data that is provided in the February 2015 IHS forecast for each of the following items: “Housing Starts, Total Private,” “Employment, Total Nonfarm,” “Employment, Construction, Natural Resources and Mining,” and “Employment, Manufacturing.”

**The following questions relate to Ms. Payan’s testimony for SDG&E (SDG&E-32)**

1. Please provide a copy of all of the data tables and charts included in Ms. Payan’s workpapers in electronic format. If Excel workpapers are unavailable please provide the data tables as .csv files or in some other electronically readable format.
2. Regarding SDG&E’s response to UCAN Data Request-001 Question 36b: Please provide an updated forecast that uses the historical data from the 4th quarter 1987 through the 4th quarter 1989.
3. Regarding SDG&E’s response to UCAN Data Request-001 Question 37a: Did SDG&E investigate the possible reason behind these outliers? If so, what were the findings?
4. In the residential model SDG&E used variables “SEA2” and “SEA3” corresponding to Summer and Fall but did not include a third variable to differentiate Winter from Spring. Why wasn’t a third seasonal variable included in the model? What regressions did SDG&E run to arrive at the conclusion that a model combining Winter and Spring was the best fit for the data? Please detail these regressions and provide their regression statistics.
5. In SDG&E’s model for new electric customers described in SDG&E Exhibit 31, SDG&E used data on occupied households from the California Department of Finance. Why wasn’t this data used in the model for new gas customers?
6. Regarding SDG&E’s response to UCAN Data Request-001 Question 38: Did SDG&E test whether a non-logarithmic model would be a better fit for this year’s forecast? If so, what other models were tested and what were the results?
7. Regarding SDG&E’s response to UCAN Data Request-001 Question 39c: SDG&E described the “primary” differences between the housing start data used in Ms. Payan’s and Mr. Schiermeyer’s testimonies. Please describe all other differences not included in SDG&E’s response.
8. The historical data provided in SDG&E’s supplemental response to UCAN Data Request-001 Question 39d is inconsistent with the data used in SDG&E’s workpapers and provided in SDG&E’s original response to UCAN Data Request-001 Question 35. Please explain the reason for this discrepancy. Does IHS routinely make adjustments to the historic data in updates to their reports?
9. Regarding SDG&E’s response to UCAN Data Request-001 Question 40: Was housing permit data considered for the 2016 GRC gas customer forecast? If so, why did SDG&E decide not to include it in the final estimation model? Did SDG&E consider using housing permit data for the 2016 GRC electric customer forecast?
10. Regarding SDG&E’s response to UCAN Data Request-001 Question 41d: In SDG&E’s model for non-residential electric customers SDG&E based the forecast on IHS employment data Employment (Total Nonfarm), less Employment (Construction, Natural Resources, and Mining), less Employment (Manufacturing). In contrast the model for non-residential gas customers was based only on the IHS data for Employment (Total Nonfarm). Please explain why the electric model subtracted Construction, Natural Resources, Mining and Manufacturing employment while the gas model did not.
11. Regarding SDG&E’s response to UCAN Data Request-001 Question 41d: SDG&E used historic data for employment in San Diego County from the California Employment Development Department (EDD) and scaled that data to the IHS employment forecast in the gas customer forecast. In contrast, SDG&E relied only on employment data from IHS in the electric customer forecast. Please explain why the gas customer forecast used the EDD data and the electric customer forecast did not.

**The following questions relate to Ms. Sommerville’s testimony for SDG&E (SDG&E-34)**

1. SDG&E collects a $10 monthly charge for smart-meter opt-out customers but is proposing a $25 charge for a fielded service request.
	1. What is the utility’s cost for monthly smart-meter opt-out (i) meter reading and (ii) billing?
	2. Please describe the actions and time needed to read an opt-out customer’s meter.
	3. Please describe the actions and time needed to complete a fielded service establishment.
	4. Please specify whether the cost of traveling to a customer site for a fielded service request is more costly to the utility than the cost of traveling to a customer site for a fielded meter reading (for smart-meter opt-out customers). If so, please explain why and provide data demonstrating the extent of the cost difference. If not, please explain SDG&E’s proposal for a $20 surcharge for a fielded service request (i.e., $25 for a fielded request vs $5 for a non-fielded request) in light of the $10 surcharge for fielded meter reading.
2. What number of the active legacy gas meters and legacy electric meters are in place due to customer opt-out and what number are in place because SDG&E was unable to install smart meters at the customer location? Please answer separately for each major customer class.

**The following questions relate to Ms. Payan’s testimony for SoCalGas (SCG-30)**

1. Please provide a copy of all of the data tables and charts included in Ms. Payan’s workpapers in electronic format. If Excel workpapers are unavailable please provide the data tables as .csv files or in some other electronically readable format.
2. Please provide SoCalGas’s monthly count of total active gas meters from January 2013 through January 2015 for each of the following customer categories: Residential single-family, Residential multi-family, Residential master meter, Commercial, Industrial, and Total (defined consistent with the categories in Table SCG-RMP-2).
3. Please provide all the source data from IHS Global Insight that were used in Ms. Payan’s analysis.
4. Please provide updated data from IHS from February 2015 including the full historical time series used in the analysis.
5. If the source data from IHS was modified to arrive at the variables “HSSF,” “HSMF” and “EmpCom” please provide a workpaper to demonstrate how the data was modified with formulas and links intact.
6. What is the reason for the dummy variables DUM9603, DUM0503, and DUM0711 in the Residential, Single Family forecast, and the dummy variables DUM8604, DUM9603, and DUM0303 in the Residential, Multi-Family forecast. If these dates were found to be outliers, did SoCalGas investigate the possible reason behind these outliers? If so, what were the findings?
7. In the residential model SoCalGas used variables “SEA2” and “SEA3” corresponding to Summer and Fall but did not include a third variable to differentiate Winter from Spring. Why wasn’t a third seasonal variable included in the model? What regressions did SoCalGas run to arrive at the conclusion that a model combining Winter and Spring was the best fit for the data? Please detail these regressions and provide their regression statistics.
8. Why weren’t seasonal dummy variables used in in the residential multi-family forecast?
9. Please explain the reason for the inclusion of residential housing starts from one quarter prior (“t-1”) and two years prior (“t-8”) as a parameter and not residential housing starts from 2-7 quarters prior in the Residential Single Family forecast.
10. Please explain the reason for the inclusion of residential housing starts from one year prior (“t-4”) and two years prior (“t-8”) as a parameter in the Residential Multi Family forecast in contrast with the t-1 and t-8 lagged housing start data used in the Residential Single Family forecast discussed in the question above.
11. Please explain why the Residential Master Meter forecast is based on an exponential trend rather than housing start data and seasonal factors as were used in the Residential Single Family and Residential Multi Family forecasts.
12. In SDG&E’s model for new electric customers described in SDG&E Exhibit 31, SDG&E used data on occupied households from the California Department of Finance. Why wasn’t this data used in the model for SoCalGas’ new gas customers?
13. Why did SoCalGas use a logarithmic model to forecast commercial and industrial gas customers? Did SoCalGas test whether a non-logarithmic model would be a better fit for this year’s forecast? If so, what other models were tested and what were the results?
14. In the Industrial model SoCalGas used variables “SEA3” and “SEA4” corresponding to Fall and Winter but did not include a third variable to differentiate Spring from Summer. Why wasn’t a third seasonal variable included in the model? What regressions did SoCalGas run to arrive at the conclusion that a model combining Spring and Summer was the best fit for the data? Please detail these regressions and provide their regression statistics.
15. Please explain the reason why employment data from both one and two quarters prior was used in the Commercial customer forecast but employment data from only one quarter prior was used in the Industrial customer forecast.
16. Please provide any additional customer count forecasts developed by Ms. Payan in preparing this GRC application that use different starting points for the analysis, different variables, or different source data, and please provide the associated regression statistics.