



**Public Advocates Office**  
California Public Utilities Commission

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**PUBLIC ADVOCATES OFFICE DATA REQUEST**  
**No. CalAdvocates-TB-SCG-2020-02**

**Date: March 20, 2020**

**Response Requested: Within 15 business days but no later than April 13, 2020**

To: **Corinne Sierzant** Phone: (213) 244-5354  
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Sempra Energy

From: **Traci Bone** Phone: (415) 713-3599  
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**INSTRUCTIONS**

**General:**

You are instructed to answer the following Data Requests in the above-captioned proceeding, with written, verified responses pursuant to Public Utilities Code §§ 309.5 and 314, and Rules 1.1 and 10.1 of the California Public Utilities Commission's Rules of Practice and Procedure within ten (10) business days.

Each Data Request is continuing in nature. Provide your response as it becomes available, but no later than the due date noted above. If you are unable to provide a response by the due date, notify the Public Advocates Office within five (5) business days, with a written

explanation as to why the response date cannot be met and a best estimate of when the information can be provided. If you acquire additional information after providing an answer to any request, you must supplement your response following the receipt of such additional information.

This data request does not diminish or excuse any pending written or oral data requests to you.

The Public Advocates Offices expects you to respond to this data request in a timely manner and with the highest level of candor

**Responses:**

Responses shall restate the text of each question prior to providing the response, identify the person providing the answer to each question and his/her contact information, identify all documents provided in response to the question, and clearly mark such documents with the data request and question number they are responsive to.

Responses should be provided both in the original electronic format, if available, and in hard copy. (If available in Word format, send the Word document and do not send the information as a PDF file.) All electronic documents submitted in response to this data request should be in readable, downloadable, printable, and searchable formats, unless use of such formats is infeasible. Each page should be numbered. If any of your answers refer to or reflect calculations, provide a copy of the supporting electronic files that were used to derive such calculations, such as Excel-compatible spreadsheets or computer programs, with data and formulas intact and functioning. Documents produced in response to the data requests should be Bates-numbered, and indexed if voluminous.

**Requests for Clarification:**

If a request, definition, or an instruction, is unclear, notify the people listed above in writing within five (5) business days, including a specific description of what you find unclear and why, and a proposal for resolving the issue. In any event, unless directly otherwise by the people listed above, answer the request to the fullest extent possible, explain why you are unable to answer in full, and describe the limitations of your response.

**Objections:**

If you object to any of portion of this Data Request, please submit specific objections, including the specific legal basis for the objection, to the people listed above within five (5) business days.

**Assertions of Privilege:**

If you assert any privilege for documents responsive to this data request, please provide within five (5) business days to the people listed above a privilege log identifying each withheld document, and: (a) a summary description of the document; (b) the date of the document; (c) the

name of each author or preparer; (d) the name of each person who received the document; and (e) the legal basis for withholding the document.

**Assertions of Confidentiality:**

If you assert confidentiality for any of the information provided, please identify the information that is confidential with highlights and provide a specific explanation of the basis for each such assertion. Assertions of confidentiality will be carefully scrutinized and are likely to be challenged absent a strong showing of the need for confidentiality, with the exception of the confidentiality for sensitive personal identifying information as described below.

**Sensitive Personal Identifying Information:**

Any sensitive personal identifying information other than an employee's name shall be fully redacted unless otherwise directed. Sensitive personal identifying information includes, without limitation:

- Social security numbers.
- Bank account numbers.
- Passport information.
- Healthcare related information.
- Medical insurance information.
- Student information.
- Credit and debit card numbers.
- Drivers license and State ID information.

**Signed Declaration:**

The data response shall include a signed declaration from a responsible officer or an attorney under penalty of perjury that you have used all reasonable diligence in preparation of the data response, and that to the best of their knowledge, it is true and complete.

In addition, any claim of confidentiality or privilege shall be supported by a declaration from your attorney stating that your attorney is familiar with the relevant case law and statutes pertaining to claims of confidentiality and privilege such that there is a good faith basis for the claim.

**DEFINITIONS**

A. As used herein, the terms “you,” “your(s),” “Company,” “SCG,” and “SoCalGas” mean Southern California Gas Company and any and all of its respective present and former employees, agents, consultants, attorneys, officials, and any and all other persons acting on its behalf.

- B. The terms “and” and “or” shall be construed either disjunctively or conjunctively whenever appropriate in order to bring within the scope of these Data Requests any information or documents which might otherwise be considered to be beyond their scope.
- C. Date ranges shall be construed to include the beginning and end dates named. For example, the phrases “from January 1 to January 31,” “January 1-31,” “January 1 to 31,” and “January 1 through January 31” should be understood to include both the 1<sup>st</sup> of January and the 31<sup>st</sup> of January. Likewise, phrases such as “since January 1” and “from January 1 to the present” should be understood to include January 1<sup>st</sup>, and phrases such as “until January 31,” “through January 31,” and “up to January 31” should also be understood to include the 31<sup>st</sup>.
- D. The singular form of a word shall be interpreted as plural, and the plural form of a word shall be interpreted as singular whenever appropriate in order to bring within the scope of these Data Requests any information or documents which might otherwise be considered to be beyond their scope.
- E. The term “communications” includes all verbal and written communications of every kind, including but not limited to telephone calls, conferences, notes, correspondence, and all memoranda concerning the requested communications. Where communications are not in writing, provide copies of all memoranda and documents made relating to the requested communication and describe in full the substance of the communication to the extent that the substance is not reflected in the memoranda and documents provided.
- F. The term “document” shall include, without limitation, all writings and records of every type in your possession, control, or custody, whether printed or reproduced by any process, including documents sent and received by electronic mail, or written or produced by hand.
- G. “Relate to,” “concern,” and similar terms and phrases shall mean consist of, refer to, reflect, comprise, discuss, underlie, comment upon, form the basis for, analyze, mention, or be connected with, in any way, the subject of these Data Requests.
- H. When requested to “state the basis” for any analysis (including studies and workpapers), proposal, assertion, assumption, description, quantification, or conclusion, please describe every fact, statistic, inference, supposition, estimate, consideration, conclusion, study, and analysis known to you which you believe to support the analysis, proposal, assertion, assumption, description, quantification, or conclusion, or which you contend to be evidence of the truth or accuracy thereof.
- I. Terms related in any way to “lobbying,” lobbyist,” “lobbying firm” and “lobbyist employer” shall, without limitation, be construed broadly and, without limitation, to be inclusive of how those terms are used in the Sempra Energy Political Activities Policy (Policy) and the

California Political Reform Act (Act). For purposes of this data request, the Act's definitions shall understood to include all manner of state, regional, and local government or agencies.<sup>1</sup>

### **DATA REQUEST**

1. Please provide all documents related to SoCalGas and Sempra training and reporting programs that are used to ensure compliance with the Sempra Energy Political Activities Policy (Policy). See Policy at Section 1, p. 1 (“the company has a robust training and reporting program in place to ensure compliance”).
2. Regarding the Policy’s requirement at page 3 under “Lobbying” that all employees who engage in lobbying activities are required to report their activity in LATS, please explain what “LATS” is and all of the data fields it contains.
3. Please identify all SoCalGas and Sempra Energy employees who have LATS entries for activity between January 1, 2015 and today, and provide copies of all such LATS entries.
4. Please identify all SoCalGas and Sempra Energy employees who have engaged in lobbying activities at any time between January 1, 2015 and today who do not have LATS entries, and explain why they do not have LATS entries.
5. Please identify all SoCalGas and Sempra Energy employees who have lobbied at any time between January 1, 2015 and today regarding issues related to decarbonization.
6. Please explain how SoCalGas and Sempra decide whether an employee’s work should be allocated to shareholders or ratepayers and who makes such a determination. If this determination varies by business unit, please explain the process for each business unit.
7. Please explain how SoCalGas and Sempra record the cost of employee work that is shareholder-funded, and the accounts where such time is recorded.
8. Please explain how SoCalGas and Sempra record the cost of employee work that is ratepayer-funded, and the accounts where such time is recorded.
9. For all SoCalGas and Sempra Employees who have lobbied at any time between January 1, 2015 and today on behalf of either organization, please identify by each employee and for each year the portion of their time allocated to ratepayer-funded lobbying, and quantify the monetary value of that work for each employee by year.

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<sup>1</sup> The Sempra Energy Political Activities Policy defines lobbying broadly on page 3 as: “any action intended to influence legislative or administrative action, including activities to influence government officials, political parties, or ballot measures. Lobbyists can be individual employees or the company that employees them, referred to as a Lobbyist-Employer.”

10. For all SoCalGas and Sempra Employees who have lobbied at any time between January 1, 2015 and today on behalf of either organization, please identify by each employee and for each year the portion of their time allocated to shareholder-funded lobbying, and quantify the monetary value of that work for each employee by year.
11. Please provide a fully executed copy of the entire contractual agreement between SoCalGas and Marathon Communications Inc. including the confidentiality provision which prevents SoCalGas from releasing the prices that Marathon charges for their services without being in breach of contract.<sup>2</sup> Please also provide supporting documentation to demonstrate that this contract is binding on SoCalGas and has not been superseded by any other contract.
12. For the period between January 1, 2015 and today, please provide all documents submitted to the to the California Public Utilities Commission pursuant to General Order 77 by SoCalGas and Sempra Energy, including both the public and confidential versions of such submissions. To the extent such submissions are available on the company's website, you may provide a link to that information.<sup>3</sup>

**END OF REQUEST**

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<sup>2</sup> SoCalGas attorneys asserted during a Meet and Confer discussion on March 19, 2020 that such a term exists in its agreement with Marathon Communications, Inc.

<sup>3</sup> We note that a public version of SoCalGas' 2017 GO-77M statement is available on its website, but that no other versions are available.