

**Joint Utility Low Income Public Meeting  
For the California Alternate Rates for Energy (CARE) Program  
And the Low Income Energy Efficiency (LIEE) Program**

**September 21, 2010**

**Meeting Notes**

In accordance with Ordering Paragraph 12 of the California Public Utilities Commission's (Commission) Decision (D.) 06-12-038 issued on December 14, 2006, Pacific Gas and Electric Company (PG&E), San Diego Gas & Electric Company (SDG&E), Southern California Edison Company (SCE), and Southern California Gas Company (SoCalGas) (the Joint Utilities) held a public meeting on July 1, 2010 to discuss the California Alternate Rates for Energy (CARE) program and the Low Income Energy Efficiency (LIEE) Program. D.06-12-038 directed the utilities to convene a meeting every ninety days, provide a notice to all parties to the proceeding, and open the meeting to the public. D.06-12-038 also directed the utilities to take notes of the meeting and provide to the members of the Low Income Oversight Board, the attendees at the meeting, the Energy Division staff, and any other party requesting the meeting notes.

**Meeting Attendees**

<b><u>In Person Attendees</u></b>	<b><u>Attendees by Phone</u></b>
Tory Francisco, CPUC Energy Division	Jim Hodges, ACCESS
Alice De La Torre, Hearts & Hands	Karen Watts Zaghera, DRA
Monica Valdez, John Harrison Contracting	Kyle Jeffrey, RHA Inc.
Melissa Mar, ACCESS	Celia Andrade, PACE Energy
Richard Villasenor, TELACU	Kelly Hymes, CPUC Energy Division
Ed Becker	Linda Otura, CPUC Energy Division
Shawn Dawkins	Megha Lakhchaura, CPUC Energy Division
Mary O'Drain, PG&E	Zaida Amaya, CPUC Energy Division
Tina Nguyen, PG&E	Kathy Wickware, SDG&E/SoCalGas
Linda Fontes, PG&E	Dave Cantrell, SoCalGas/SDG&E
Frances Thompson, PG&E	Holly Lloyd, Southwest Gas
Mauricio Blanco, SCE	Traci Rossetti-Smith, LA Works
Roberto Del Real, SCE	Ed Bonilla, PG&E
Sheila Lee, SCE	Jim Hodges, ACCESS
John Fasana, SCE	Alex Jackson
Flor Tolley, SCE	
Joy Yamagata, SDG&E/SoCalGas	
Regina Lugani, SoCalGas	
Carmen Rudshagen, SoCalGas	
Athena Wang, SoCalGas	
delia Meraz, SoCal Gas	
Hugh Yao, SoCalGas	
Sandra Williams, SDG&E	

### **Welcome - Introduction**

The meeting began at 10:45 a.m. and was led by John Fasana, Southern California Edison. There was a brief introduction from persons in attendance and those participating by teleconference.

### **Public Input – non agenda items**

No input was provided by the Public.

### **CARE Discussion**

Kelly Hymes provided information that an agenda item for the September 22, 2010 LIOB meeting would be ways to improve the quarterly low income meetings. A meeting with TELACU; Paul Phillips (Commissioner Simon's staff); Andy Schwartz (President Peevey's staff); and Kelly Hymes (Gruenich's staff) was held where it was generally agreed that an unofficial meeting to discuss technical aspects of the low income program should be held. Notice will be provided to the entire service list; and, the meetings will be held between quarterly meetings.

John Fasana added that the first meeting will be held October 1, 2010 at PG&E's Energy Center in San Francisco.

John Fasana, SCE, provided the CARE presentation for the investor-owned utilities (IOUs) achievements and program activities from January 1 through August 31, 2010. The presentation was emailed to the service list. See CARE portion of the presentation included below.

Kelly Hymes stated that the IOUs should be commended for their penetration rates for the CARE Program as Lifeline's penetration is only at 73%.

Tory Francisco, Energy Division, asked PG&E if the 3<sup>rd</sup> party vendor information was used for LIEE as well. Linda Fontes, PG&E, responded that data was purchased from an outside vendor and that the vendor information has not proven to be more effective than PG&E's internal flags. Linda further responded that the information was used for LIEE as well but that PG&E probably would not seek to purchase this data again as it was costly and did not garner the expected results.

Kelly Hymes asked SCE to explain the Energy Advisor Pilot. Flor Tolley, SCE, responded that the Pilot was a campaign initiated by SCE's marketing department. Customers calling in to request bill assistance were offered the CARE, EMA and other energy efficiency programs. 300 customers enrolled in CARE. This pilot was not paid for with program funds.

Tory Francisco asked if SCE felt the pilot effort was successful. Flor stated that SCE believed the effort was successful and will be analyzing data results for future efforts. John Fasana added that SCE may be seeking cost recovery for incremental activities associated with the pilot.

Kelly Hymes responded that SCE's Energy Advisor Pilot was in line with the strategic plan and integration.

Kelly Hymes asked if all the IOUs had the same CARE line item on their bill as So Cal Gas. Flor Tolley stated it's on the 3<sup>rd</sup> page of SCE's bill. Linda Fontes, PG&E responded that this line item has been on their bills for the past few years. Carmen Rudshagen, SoCal Gas, responded that SDG&E implemented the same bill redesign and that the CARE discount amount shows on the SDG&E bill. This is the first time that SoCal Gas has clearly identified the rate discount in dollars. Bill Redesign also offers information on CARE directly on the bill.

Kelly Hymes stated that she thinks clearly identifying the rate discount in actual dollars on the bill is a great idea as some customers are unsure if they are actually enrolled in the CARE program.

Kelly Hymes asked if there have been increased enrollments in CARE due to TEAF. SCE responded that they are still going through the data and it's too early to tell. PG&E responded the same. Tory Francisco stated that the program ended September 21, 2010.

### **Temporary Energy Assistance for Families (TEAF)**

Tory Francisco provided an update on TEAF. TEAF has been up and running for four weeks. Funding expires September 21, 2010. It's too early to determine the success of the program. Tory is still waiting to hear from Harvey at DRA to see if the Federal Government will approve the second phase of funding which is tied to unemployment. Tory stated that some people were helped and provided accolades to the IOUs for supporting and pushing the TEAF effort. Tory stated that he was hopeful that more data could be provided by the next LIOB meeting.

Kelly Hymes asked if Tory would speak with Harvey at DRA prior to the September 22, 2010 LIOB meeting. Tory stated that he would try,

Kelly Hymes then asked if there was anecdotal information regarding TEAF affecting discounts. SCE responded that they do not currently have that information. PG&E responded the same. SoCal Gas and SDG&E responded that some customers were reconnected due to TEAF funding and Hugh asked if specific inquiries could be held until after the end of the month. Tory was agreeable,

### **Energy Division Update**

The Energy Division update was provided by Tory Francisco. Tory mentioned that he had been working with Mauricio Blanco, SCE, and an external vendor, Service CEO regarding some scheduling software. Tory stated that a web demonstration of the Service CEO Software would be provided later in the day and that the software vendor would call in to facilitate questions.

Kathy Kifaya, Community Action Partnership of Orange County, stated that she began using the software about four months ago and that the software was very helpful.

### **LIEE Update on Utility Progress Towards 2010 Goals**

John Fasana provided the LIEE presentation for the IOUs achievements and program activities from January 1 through August 31, 2010. John stated that the information being provided is reflected in the RDRs being filed with the CPUC on September 21, 2010. See LIEE portion of the presentation included herein.



9-21-10 LI  
Presentation.ppt

Tory Francisco asked if SoCal Gas was leveraging with local municipalities. SoCal Gas stated that agreements have been signed with Burbank Water and Power and the Irrigation District. Installations should commence 3<sup>rd</sup> Quarter 2010.

Tory asked SoCal Gas if there is EE and LIEE integration for multi-family complexes. Hugh, SoCal Gas, stated that they scrub lists to treat LIEE customers first and then return list to EE for treatment.

Tory stated that the CPUC is in communication with multi-family complexes to more effectively target this customer population.

### **Service CEO Presentation**

Mauricio Blanco and Tory Francisco presented. Jonathan Chism, the Service CEO representative, was on the phone.

Jonathan stated that Service CEO has been around for 14+ years. It supports 6,000 businesses in field service which represents approximately 20,000 users. There are two types of software packages. One is install-based software where the purchaser owns and manages maintenance of the system. The second is web-based which is managed by Service CEO.

The three components of the Field Management Software are scheduling assistance; capacity management; and the dispatch board.

A web presentation was provided via [www.insightdirect.com/routing-software/#s176160775](http://www.insightdirect.com/routing-software/#s176160775). The demonstration was to introduce contractors to the tool. Mauricio stated that Service CEO contact information and web links would be sent via email within next few days.

Jonathan stated that software is flexible and designed for scalability.

Tory asked Jonathan a question regarding integration of data with existing tracking tools. Jonathan stated that excel files can be uploaded.

### **Ideas for New LIEE Measures**

John Fasana mentioned that the IOUs are still looking for ideas for inclusion into the LIEE program for the next program cycle. Some measures have been received and those measures will be evaluated and a cost effectiveness test will be conducted. The document below includes a list of measures that have already been provided for consideration in the next program cycle.



Potential New LIEE  
Measures.doc

No comments from meeting participants were provided. John then mentioned that on October 1, 2010 from 10 a.m. to 3 p.m. a meeting will be held in San Francisco to discuss technical issues for the low income program. Those planning to attend could RSVP to Kathy Wickware. There will be teleconference capability but no webinar for this meeting.

A specific topic of discussion will be the technical installation standards updates. Draft standards will be sent via email prior to the meeting.

### **Next Steps**

The next low-income public quarterly meeting will be hosted by PG&E and it is scheduled to be held in San Francisco in December 2010.

The meeting was adjourned at 12:45 p.m.