

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

Applications of Pacific Gas and Electric Company for Approval of the 2009-2011 Energy Savings Assistance Program and California Alternate Rates for Energy Programs and Budget (U39M)	Application 08-05-022 (Filed May 15, 2008)
Application of San Diego Gas & Electric Company (U 902 M) for Approval of Low-Income Assistance Programs and Budgets for Program Years 2009 – 2011.	Application 08-05-024 (Filed May 15, 2008)
Application of Southern California Gas Company (U 904 G) for Approval of Low-Income Assistance Programs and Budgets for Program Years 2009 – 2011.	Application 08-05-025 (Filed May 15, 2008)
Application of Southern California Edison Company (U 338-E) for Approval of Low-Income Assistance Programs and Budgets for Program Years 2009, 2010 and 2011.	Application 08-05-026 (Filed May 15, 2008)

**MONTHLY REPORT OF SOUTHERN CALIFORNIA GAS COMPANY (U 904 G)  
ON LOW-INCOME ASSISTANCE PROGRAMS FOR MARCH 2011**

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April 21, 2011

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This is the third monthly report of program year (PY) 2011. The purpose of this report is to consolidate activity for the CARE and Energy Savings Assistance Program and provide the Energy Division with all the necessary information to assist in analyzing the low-income programs.

This report presents year-to-date Energy Savings Assistance Program and CARE results and expenditures through March 2011 for Southern California Gas Company (SoCalGas).

Respectfully Submitted,

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**Southern California Gas Company  
Energy Savings Assistance Program  
And  
California Alternate Rates for Energy (CARE)  
Program Monthly Report**

# LOW-INCOME ASSISTANCE PROGRAMS MONTHLY REPORT

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## ENERGY SAVINGS ASSISTANCE PROGRAM MONTHLY REPORT

### 1. Energy Savings Assistance Program Executive Summary

#### 1.1. Energy Savings Assistance Program Overview

Provide a summary of the Energy Savings Assistance Program elements as approved in Decision (D.) 08-11-031:

Program Summary for Month			
	Authorized / Planning Assumptions	Actual to Date	%
Budget	\$78,256,269	\$2,329,990	10%
Homes Treated	145,874	29,905	21%
kWh Saved	N/A	N/A	N/A
kW Demand Reduced	N/A	N/A	N/A
Therms Saved	3,345,967	369,844	11%

During the month of March, SoCalGas and its Energy Savings Assistance Program contractor network continued to work diligently on managing the heightened workflow that the 2009-11 program cycle demands. SoCalGas and its Energy Savings Assistance Program contractors increased the number of homes treated, processed and paid in March 2011 by 62% as compared with the same three-month period of 2010.

In March, SoCalGas processed and paid contractor invoices for 18,499 treated homes. SoCalGas also paid for the installation of weatherization measures in 12,631 homes (a 6% increase from March 2010). Energy Savings Assistance Program contractors serviced 1,084 appliances, which included 982 furnace repairs/replacements and 102 water heater replacements. Through its marketing, outreach and enrollment efforts, further expanded upon in section 1.3 of this report, SoCalGas generated 64,997 new Energy Savings Assistance Program leads in March, resulting in 10,981 enrollments, 22,103 leads pending enrollment, and over 10,014 leads awaiting qualification.

Based on the data presented in Table 4, the efforts of SoCalGas and its contractor network to increase enrollments have resulted in an increase in the number of homes treated in several counties such as Kern, Fresno, and Tulare. For example, in Tulare County, the total number of homes treated through March has increased by 46% as compared to the same period in 2010. This increase in the number of homes treated is likely correlated to SoCalGas' contractors' efforts of expanding their service and promoting green sector employment opportunities in these outlier areas.

During February, SoCalGas reached the authorized funding levels for the Pilot subcategory (See Energy Savings Assistance Table 1L). The contributing factor to the overage in the Pilot budget is the delayed billing from PG&E (WE&T Pilot contract administrator) due to the revision of the Pilot timelines by the California Public Utilities Commission (Commission).

SoCalGas will utilize unspent funds from 2010 for the increased costs incurred for the Pilot subcategory. SoCalGas' ability to utilize unspent funds from program year 2010 is in compliance with the rules set forth in D.08-11-031 and as modified by D.10-10-008.

SoCalGas looks forward to the many challenges of 2011 and intends to work aggressively to meet 25% of the programmatic initiative through the last year of its program cycle. SoCalGas plans to meet 2011 goals through various avenues such as expanding its operational efforts in hard to reach communities, continuing to improve and refine its internal streamlining processes and expanding data mining and customer information collection.

## 1.2 Whole Neighborhood Approach Evaluation

**1.2.1** Provide a summary of the geographic and customer segmentation strategy employed, (i.e. tools and analysis used to segment “neighborhoods,” how neighborhoods are segmented and how this information is communicated to the contractor/CBO).

In March, SoCalGas combined efforts to provide its Energy Savings Assistance Program contractor network with an additional 64 canvassing lists using the Whole Neighborhood Approach (WNA) strategy. SoCalGas continues to offer its contractors flexibility in the planning, timing and completion of their WNA efforts. This approach, in conjunction with SoCalGas oversight and guidance, allows contractors to customize their activities to meet the needs of each neighborhood as well as the needs of each customer. Contractors are asked to document all facets of each WNA effort; total number of completed homes, customers not willing to participate, successful canvassing and / or marketing efforts, and any other information that can help increase eligible customer enrollments. This detailed accounting serves to assist both the contractors and SoCalGas with future WNA activities. Additionally, smaller geographic focus of Zip+7 areas, coupled with tracking methods take into account the amount of time contractors spend working in an area and allow SoCalGas to better monitor the success of Energy Savings Assistance Program activities from a whole neighborhood perspective. The tracking methods include detailed instructions to contractors regarding data entry in the HEAT System<sup>1</sup>, both pre- and post-canvassing, to ensure specific information is captured. This information will be used to help SoCalGas distinguish WNA efforts from routine canvassing and also capture the disposition of WNA leads that do not result in an enrollment, (i.e., “unable to contact,” and “customer refused”).

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<sup>1</sup> The HEAT System is SoCalGas’ Energy Savings Assistance Program database used to track program activity and expenditures.

The canvassing lists generated in March were initiated in new Zip+7 areas, not previously targeted for WNA efforts (see table below for areas). Collectively, the canvassing lists identified an additional 16,298 customer addresses, of which 8,309 (51%) are potentially eligible based on Energy Savings Assistance Program income eligibility criteria. Additionally, based on SoCalGas data, 6,504 of the 16,298 (40%) addresses are in targeted self-certification PRIZM codes<sup>2</sup>.

<b><u>Number of WNA Events per City</u></b>	<b><u>Contractor</u></b>
Whittier – 2	<b>ACS Group</b>
Porterville – 1	<b>Garcia &amp; Sons</b>
Corcoran – 5; Exeter – 5; Lemoore – 5	<b>Highland Energy Service</b>
Los Angeles – 4; San Fernando – 5; Ontario – 7; Garden Grove – 6	<b>Reliable Energy</b>
El Monte – 5	<b>Richard Heath Associates</b>
Lamont – 3; Shafter – 2; Wasco – 2; Bakersfield – 2	<b>Staples and Associates</b>
La Habra – 10	<b>The East Los Angeles Community Union</b>

Through March, SoCalGas and its Energy Savings Assistance Program contractors treated 367 homes through WNA activities. SoCalGas continues to involve more Energy Savings Assistance Program contractors as well as external partners in the planning of future WNA events. For future reporting, SoCalGas will continue to monitor the resulting enrollments and measure installations completed through WNA efforts. In addition, SoCalGas is actively investigating marketing, outreach, and enrollment tactics as well as geographic and customer segmentation strategies that will help increase the number of households served by the Energy Savings Assistance Program.

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<sup>2</sup> Prizm codes are an area set of customer segmentation data widely used for marketing purposes in the United States. The data consist of demographic clusters that categorize every U.S. household into a segment. These segments were developed in part from the analysis of U.S. census data and categorize U.S. consumers into 14 distinct groups and 66 segments. The segments help marketers tailor content to consumers' needs and look at a variety of factors, including income, likes, dislikes, lifestyles and purchase behaviors.



### **1.3. Energy Savings Assistance Program Customer Outreach and Enrollment Update**

**1.3.1** Provide a summary of the Energy Savings Assistance Program outreach and enrollment strategies deployed this month.

#### **Energy Savings Assistance Program Bill inserts/onserts**

SoCalGas conducted a bill onsert campaign in the month of March. The bill onsert campaign was bilingual (English / Spanish) and mailed to over 4,300,000 residential customers. A bill onsert, which is attached to a customer's bill, is designed to drive customers to a custom web page so customers can fill out an on-line Energy Savings Assistance Program lead form. The bill onsert also contains valuable information about other assistance programs, such as CARE and Medical Baseline, that can further assist low-income and special needs customers.

#### **Energy Savings Assistance Program Direct Mailings**

No direct mailings were completed in March. However, results from a February direct mail campaign to Kings, Los Angeles, Orange and Ventura counties SoCalGas residential customers are expected and will be reported in the May report. The campaign generated over 48,000 personalized letters in English and Spanish to existing CARE customers in the following zip codes: 93230, 91335, 91405, 91402, 92804, 93257 and 93274.

#### **Energy Savings Assistance Program Outbound Dialing**

There was one Automated Voice Messaging Campaign (AVM) launched in March to 32,792 residential CARE customers throughout SoCalGas' service territory. As a result of this campaign, there were 2,160 Energy Savings Assistance Program leads generated. SoCalGas will continue to use AVM campaigns throughout 2011 as another method to reach out and encourage customers to enroll in the Energy Savings Assistance Program.

### **Energy Savings Assistance Program Web Activities<sup>3</sup>:**

In March over 25,000 new SoCalGas customers received a welcome e-mail from SoCalGas. In addition to general information, the e-mail also included information about SoCalGas' assistance programs and encouraged customers to apply for Energy Savings Assistance Program's no cost home improvements. For customer convenience, a direct link to SoCalGas' on-line Energy Savings Assistance Program request (lead) form was imbedded in the e-mail. As of March 31<sup>st</sup>, 2,975 customers completed on-line English Energy Savings Assistance Program request forms and 7 customers completed on-line Spanish Energy Savings Assistance Program request forms.

Additionally, an e-mail was sent to over 6,650 customers enrolled for the first time in SoCalGas' *My Account* program. Approximately 95% of those *My Account* customers were existing SoCalGas CARE participants and as such, are income eligible for Energy Savings Assistance Program services. *My Account* is SoCalGas' one stop, on-line service center specific to SoCalGas account holders. When a customer signs up for *My Account*, in addition to receiving and paying bills on-line, they can request to start, stop or transfer their gas service, request an appliance service appointment, fill out an on-line request for Energy Savings Assistance Program services and much more.

#### **1.3.2 Customer Assistance Events and Public Affairs/Public Relations Activities for the CARE and Energy Savings Assistance Program.**

##### **3/02/2011 Evans Consumer Information Fair**

SoCalGas attended the Evans Community Adult School Consumer Information Fair sponsored by the County of Los Angeles. Approximately 500 consumers attended the fair. Evans Community Adult School provides instruction to a

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<sup>3</sup> SoCalGas's website is designed to comply with W3C accessibility guidelines.

diverse Limited English Proficient (LEP) student body. To meet diversity needs, SoCalGas offered customer assistance brochures, which provides an overview of its assistance programs such as CARE, Energy Savings Assistance Program and Medical Baseline, in five different languages (English, Spanish, Vietnamese, Chinese and Korean) and distributed language appropriate brochures to over 200 attendees.

### **3/5/2011 California Council of the Blind**

SoCalGas attended the California Council of the Blind's San Gabriel Valley chapter meeting and distributed Braille copies of a brochure entitled "Services for Customers with Disabilities." Chapter members were curious about other Braille offerings and were informed that SoCalGas customers are able to request a Braille gas bill summary.

### **3/09/2011 LA CARE Presentations**

SoCalGas' representatives participated in the Los Angeles Care Health Executive Community Advisory Committee as presenters. SoCalGas presented information on its CARE, Energy Savings Assistance Program and Medical Baseline programs to an audience of over 30 people. SoCalGas plans to continue nurturing a partnership with Los Angeles Care since the organization is the administrator for the Los Angeles County Medi-Cal program and customers participating in Medi-Cal can categorically qualify for SoCalGas' CARE and Energy Savings Assistance Program.

### **3/10/2011 New Horizons in San Fernando Valley**

SoCalGas representatives attended a New Horizons event. New Horizons is a non-profit organization dedicated to helping adults with developmental disabilities. The agency provides services and support each year to approximately 800 adults (age 18 and older). These services include job training and placement, education, counseling, residential services and social programs. SoCalGas plans to partner with this organization to offer residential services

assistance such as energy education and ways to sign up for SoCalGas' CARE and Energy Savings Assistance Program.

**3/24/2011 Faithfully Yours Educational Seminar**

SoCalGas participated in one of Broadway Federal Bank's quarterly faith-based educational seminars for inner city churches. SoCalGas Public Affairs staff provided an overview of the company's customer assistance programs. Attendees were also informed about CARE's capitation program and the opportunity for faith-based organizations to become capitation agencies.

**3/28/2011 New Directions for Youth, Inc.**

SoCalGas representatives met with New Directions For Youth, Inc. which is a non-profit youth development organization providing direct services and programs to at-risk youth and families throughout the San Fernando Valley and in the greater Los Angeles area. Many who participate in New Directions for Youth are enrolled in the National School Lunch Program (NSLP) which is a categorically eligible (CE) program. SoCalGas plans to establish a partnership with New Directions for Youth to promote its Energy Savings Assistance Program and CARE programs to all eligible New Directions clients.

**1.4. Leveraging Success Evaluation, Including CSD**

**1.4.1** Please provide a status of the leveraging effort with CSD. What new steps or programs have been implemented? What was the result in terms of new enrollments?

There are no updates for March regarding leveraging efforts with CSD. SoCalGas will continue to monitor discussions between CSD, CPUC and other utilities for closer collaboration and leveraging with CSD.

SoCalGas continues its efforts to meet with various municipal utilities that provide electric and water services to customers in SoCalGas' service territory to identify opportunities to leverage one another's version of the Energy

Savings Assistance Program . SoCalGas and Riverside Public Utilities (RPU) have exchanged a preliminary working agreement to jointly serve customers residing in the utilities' overlapping service territories to benefit from SoCalGas' Energy Savings Assistance Program services and from RPU's service offerings to low-income customers during the same visit. SoCalGas and RPU will continue their efforts to establish an agreement that best serves both utilities' low-income customers.

After undergoing an internal reorganization, Imperial Irrigation District (IID) has renewed the Energy Savings Assistance Program leveraging agreement for another year. SoCalGas received the updated contract from IID in February and also an updated customer list from IID for year-end 2010. Canvassing is set to begin in April.

SoCalGas and Burbank Water and Power (BWP) are ready to begin work on their Energy Savings Assistance Program leveraging agreement. Information sharing for this effort began in September 2010 and canvassing is scheduled to begin in April with a pilot area to be identified.

SoCalGas and Eastern Municipal Water District (EMWD) have completed a leveraging agreement where EMWD will provide a rebate to SoCalGas for every High Efficiency Clothes Washer installed within the two utilities' joint service territory under SoCalGas' Energy Savings Assistance Program. Initial installations under the signed agreement began in December 2010 and will continue throughout 2011.

SoCalGas has finalized details for the invoicing and billing of Energy Savings Assistance Program services for these leveraging partners and will begin billing for non-IOU measures approximately thirty days after the first installations occur.

## **1.5. Workforce Education & Training**

**1.5.1** Please summarize efforts to improve and expand Energy Savings Assistance Program workforce education and training. Describe steps taken to hire and train low-income workers and how such efforts differ from prior program years.

The Commission's Workforce, Education and Training (WE&T) Pilot is being finalized between Los Angeles Trade Technical College (LATTC), SoCalGas and LATTC's industry partners Community Enhancement Services (CES) and The East Los Angeles Community Union (TELACU). LATTC has submitted their final report for review and the results of the WE&T Pilot, including the Northern California partners, will be published by the Commission. PG&E is the program administrator and has facilitated the WE&T pilot communication between the Northern and Southern California partners and the Commission.

In March SoCalGas continued its internal training programs which contribute to the goals of workforce development. The Energy Savings Assistance Program contractor network pulls the majority of its labor resources from the local communities it services, including the low-income communities within SoCalGas' service territory. In addition, the Energy Savings Assistance Program training programs supported by SoCalGas are critical in maintaining a high quality of service for its customers as well as for program implementation.

As part of our continued effort in maintaining high quality service SoCalGas has scheduled its next refresher workshop for all contractors for July 14<sup>th</sup> & 15<sup>th</sup>.

In an effort to help increase workforce development to low-income communities within its service territory SoCalGas continues to accommodate all eligible participants by having larger classes of 20 to 40 students and/or adding classes. SoCalGas will continue to see an increase in recruitment efforts from its contractor base. New contractors are encouraged to hire former census

employees and any other displaced workers, including former military personnel to expand employment opportunities in the community.

As part of quality assurance SoCalGas had four follow-up visits with its new contractors to ensure proper policy and procedure training. This follow-up visit covered the administrative, customer tracking system and invoicing policies and procedures.

SoCalGas provides two areas of training: 1) Enrollment and Assessment (E&A) and 2) Energy Savings Assistance Program Operations. The Year-to-Date results are shown in the following tables:

<b>SoCalGas Skill-Level Test Results</b>				
	<b>Jan</b>	<b>Feb</b>	<b>March</b>	<b>Total</b>
Attended Testing	49	56	21	126
Passed Test	34	32	15	81
Pass Rate	<b>69.4%</b>	<b>57.1%</b>	<b>71.4%</b>	<b>64.3%</b>

After successful completion of the Skill Level Test, the potential outreach specialist attends a mandatory 5-day class which reviews the requirements for enrollment, assessment and in-home education.

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<b>SoCalGas Enrollment and Assessment Training</b>				
	<b>Jan</b>	<b>Feb</b>	<b>March</b>	<b>Total</b>
Attended Class	23	46	24	93
Passed Class	22	45	24	91
Badged	21	37	24	82
Retention Rate <sup>4</sup>	<b>95.7%</b>	<b>97.8%</b>	<b>100%</b>	<b>97.8%</b>

The 5 day class covers utility-specific items related to policies, security process and overall customer service standards as well as for leveraging opportunities amongs other low income programs. A final exam must be passed for an outreach specialist to be registered and receive a SoCalGas badge. The year-to-date total for registered outreach specialists for SoCalGas is 82. The classes are held at SoCalGas' Energy Resource Center located in Downey, California.

SoCalGas encourages all of its Enrollment & Assessment contractors to utilize Census employees for any Energy Savings Assistance Program outreach. As a result there were 8 previous Census employees successfully attend and pass SoCalGas' outreach and assessment training.

Field Operations experienced an increase in training to train employees of 4 new contractors recently hired by SoCalGas. SoCalGas training includes initial training for new participants in weatherization, inspections, HVAC and NGAT. SoCalGas also provides refresher training primarily to address contractor issues and discuss new measures and procedures that have been implemented into the

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<sup>4</sup> Retention Rate is Passed/Attended



program. The table below shows the number of students that have attended class in 2011. The class sizes range from 5 – 35 technicians.

The year-to-date total for SoCalGas field operations training classes is 33 with 216 students in attendance.

<b>SoCalGas Field Training</b>								
Class Type	January		February		March		Total	
	No of Classes	No of Students	No. of Classes	No of Students	No of Classes	No of Students	No of Classes	No of Students
<b>Initial</b>	6	16	7	40	8	53	21	109
<b>Refreshers</b>	3	16	0	0	3	21	6	37
<b>NGAT 5-Day</b>	2	17	2	26	2	27	6	70
<b>Grand Total</b>	11	49	9	66	13	101	33	216

## 2. CARE Executive Summary

### 2.1. CARE Program Summary

2.1.1. Please provide CARE program summary costs.

<b>CARE Budget Categories</b>	<b>Authorized Budget</b>	<b>Actual Expenses to Date</b>	<b>% of Budget Spent</b>
Outreach	\$3,785,932	\$739,925	20%
Proc., Certification and Verification	\$1,248,928	\$334,107	27%
Information Tech./Programming (1)	\$522,554	\$113,957	22%
Pilots (2)	N/A	N/A	N/A
Measurement and Evaluation	\$17,192	\$0	0%
Regulatory Compliance	\$236,919	\$58,023	24%
General Administration	\$604,963	\$156,881	26%
CPUC Energy Division Staff	\$171,500	\$20,407	12%
Cooling Centers (3)	N/A	N/A	N/A
<b>Total Expenses</b>	<b>\$6,587,988</b>	<b>\$1,423,299</b>	<b>22%</b>
Subsidies and Benefits (4)	\$135,901,649	\$44,954,566	34%
<b>Total Program Costs and Discounts</b>	<b>\$142,489,637</b>	<b>\$47,353,600</b>	<b>33%</b>

2.1.2. Please provide the CARE program penetration rate to date.

CARE Penetration		
Participants Enrolled	Eligible Participants	Penetration rate
1,721,214	1,842,984	93.4%

## 2.2. Outreach

2.2.1. Discuss utility outreach activities and those undertaken by third parties on the utility's behalf. (For additional CARE Outreach see section 1.3.2.)

### **CARE Telephone Enrollments and Recertification**

SoCalGas' successful automated voice (AVM) campaigns provide considerable cost savings, are environmentally friendly, and most important, offer customers an easy method of enrolling or recertifying in the CARE program. If the customer does not answer the automated phone call, the system leaves a call back message which includes an 800 number for the customer to utilize. During March 2011, more than 6,000 CARE customers were called and reminded that their eligibility was about to expire. 1,169 customers used the automated system and recertified their eligibility. In addition, SoCalGas also sent 2,500 electronic recertification reminders to CARE customers with an email address on file. The emails included a direct link to the SoCalGas CARE web page.

### **CARE Web Activity & Enrollments**

During March, SoCalGas received 8,894 applications through its internet-based outreach activities. These activities resulted in 4,272 new CARE enrollments and 1,344 recertifications. Web outreach activities also included email promotions to over 6,553 customers and continual promotion of the CARE

website through various collateral materials, web links, electronic newsletters, select mass media campaigns and multiple public service announcements.

### **CARE Third-Party Enrollments & Outreach**

In March, SoCalGas' third-party, door-to-door, CARE outreach program enrolled 3,425 hard-to-reach customers, who for a variety of reasons have been non-responsive to other outreach methods. As a result of the high unemployment rates, SoCalGas' third party contractors have been canvassing neighborhoods with minimal outreach activity in previous program years. SoCalGas's primary outreach vendor works in almost every county in SoCalGas' service territory.

Additionally, as a result of an agreement between SoCalGas and 211 LA County, 211 continues to refer interested, potentially eligible callers to SoCalGas' CARE program as well as promote CARE and other SoCalGas assistance programs at select events. During March, LA 211 attended 5 community events with a total attendee audience of more than 600.

### **CARE Direct Mail Activity and Enrollments**

During March, SoCalGas processed returns from a February direct mail campaign to 500,000 non-CARE, residential customers. The direct mail campaign targeted much of the overlapping service territory between SoCalGas and Southern California Edison (SCE). By the end of March, 29,000 customers had returned the mailing ; over 17,000 new enrollees had been added.

### **CARE Bill Inserts**

There were no CARE bill inserts during March.

## **CARE Mass Media Campaigns**

There were no CARE mass media campaigns conducted by SoCalGas during March.

### **2.2.2. Describe the efforts taken to reach and coordinate the CARE program with other related low-income programs to reach eligible customer.**

As part of SoCalGas' on-going efforts to create outreach and promotional opportunities through the establishment of partnerships with other organizations also serving a low-income clientele, SoCalGas engaged in the following during the month of March:

SoCalGas met with New Horizons, a non-profit organization dedicated to helping adults with developmental disabilities. SoCalGas plans to partner with this organization to help clients learn about, and enroll, in its assistance programs. SoCalGas also met with New Directions For Youth, Inc., a non-profit youth development organization providing direct services and programs to at-risk youth and families throughout the San Fernando Valley and in the greater Los Angeles area. SoCalGas also seeks to establish a partnership with this organization. Additionally, during March, SoCalGas once again presented information on CARE, Energy Savings Assistance Program and other SoCalGas assistance programs at the Los Angeles Care Health Education Conference. Los Angeles CARE serves as administrator for Los Angeles County Medi-Cal, and Medi-Cal is a qualifying categorically eligible (CE) public assistance program. Therefore, leveraging between SoCalGas' CARE program and LA CARE will benefit all parties.

To ensure continued increases in CARE enrollments and retain customers already participating in CARE, SoCalGas also shares customer information with other utilities such as SCE, SDG&E, PG&E, and LADWP. Additionally, CARE

shares data with internal programs such as Energy Savings Assistance Program and the Gas Assistance Fund.

Coordinating the CARE program with other related low-income programs not only results in higher program participation rates, it also helps increase PEV activities when customer information is shared with programs such as LIHEAP. Since LIHEAP requires upfront proof of income and is a qualifying CE program, once CARE receives LIHEAP customer data, those customers are considered automatically eligible due to CE criteria and their “pre enrollment verification “ is used by SoCalGas to meet CARE’s “post enrollment” income requirements.

In March, 16,208 customers were enrolled in SoCalGas’ CARE program as a result of all internal and external data sharing activities.

### **2.3 CARE Recertification Complaints**

March 9, 2011

A customer notified SoCalGas that she was upset that her gas account and phone number were visible through the “window” on her CARE recertification envelope.

Resolution: SoCalGas called customer to thank her for bringing the matter to the utility’s attention. SoCalGas plans to review all data distribution practices to ensure no errors are occurring when applications are automatically folded and inserted into mailing envelopes.

March 22, 2011

A customer claimed he did not receive recertification forms mailed by SoCalGas in October, 2010. Customer’s account was terminated from CARE January 2011.

Resolution: SoCalGas tried to contact customer by telephone, however, it had been disconnected. SoCalGas mailed another recertification application to customer's address of record.

March 26, 2011

Customer contacted SoCalGas' CARE staff to comment on receiving multiple CARE recertification requests (one via e-mail, the other by telephone 24 hours later).

Resolution: CARE staff explained to customer that the recertification email and phone call request erroneously crossed each other. SoCalGas thanked customer for bringing the matter to the utility's attention.

### **3. Appendix Energy Savings Assistance Program Tables and CARE Tables**

**Energy Savings Assistance Program** - Table 1- Energy Savings Assistance Program Expenses

**Energy Savings Assistance Program** - Table 2- Energy Savings Assistance Program Expenses & Energy Savings by Measures Installed

**Energy Savings Assistance Program** - Table 3- Energy Savings Assistance Program Average Bill Savings per Treated Home

**Energy Savings Assistance Program** - Table 4- Energy Savings Assistance Program Homes Treated

**Energy Savings Assistance Program** - Table 5- Energy Savings Assistance Program Customer Summary

**Energy Savings Assistance Program** - Table 6- Energy Savings Assistance Program Expenditures for Pilots and Studies

**Energy Savings Assistance Program** - Table 7- Whole Neighborhood Approach

**CARE**- Table 1- CARE Overall Program Expenses

**CARE**- Table 2- CARE Enrollment, Recertification, Attrition, and Penetration

**CARE**- Table 3- CARE Verification

**CARE-** Table 4- Self Certification and Re-Certification

**CARE-** Table 5- Enrollment by County

**CARE-** Table 6- Recertification Results

**CARE-** Table 7- Capitation Contractors

**CARE-** Table 8- Participants as of Month End