

**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 DECEMBER 2011**

Kim F. Hassan

Attorney for  
Southern California Gas Company  
555 West Fifth Street GT14E7  
Los Angeles, CA 90013  
Telephone: (213) 244-3061  
Facsimile: (213) 629-9620  
E-Mail: KHassan@semprautilities.com

January 23, 2012

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

This is the twelfth and last monthly report of program year (PY) 2011. The purpose of this report is to consolidate activity for the CARE Program 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 December 2011 for Southern California Gas Company (SoCalGas).

Respectfully Submitted

/s/ Kim F. Hassan

Kim F. Hassan  
Attorney for  
Southern California Gas Company  
555 West Fifth Street GT14E7  
Los Angeles, CA 90013  
Telephone: (213) 244-3061  
Facsimile: (213) 629-9620  
E-Mail: KHassan@semprautilities.com

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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

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

Program Summary through Month 12			
	Authorized / Planning Assumptions	Actual to Date	%
Budget	\$78,256,269	\$102,091,356	130%
Homes Treated	145,874	150,165	103%
kWh Saved	N/A	N/A	N/A
kW Demand Reduced	N/A	N/A	N/A
Therms Saved	3,345,967	4,306,470	129%

During the month of December, 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 surpassed the number of homes treated during PY2010 by treating 150,165 homes through December 2011, compared to the 110,296 total homes treated, processed and paid through the end of December 2010. In contrast with 2010, SoCalGas and its Energy Savings Assistance Program contractors increased the number of homes treated, processed and paid in 2011 by 36%.

In December, SoCalGas processed and paid contractor invoices for 16,016 treated homes. SoCalGas also paid for the installation of weatherization measures in 11,778 homes. Energy Savings Assistance Program contractors serviced or replaced 2,030 appliances, which included 1,825 furnace repairs/replacements, 204 water heater replacements, and 1 high efficiency clothes washer.

Current efforts by SoCalGas and its Energy Savings Assistance Program contractor network have resulted in a total homes treated count that is 103% of the 2011 goal.

During December, SoCalGas reached the authorized funding levels for the In-Home Energy Education subcategory and Inspections category (See ESAP Table 1). On November 21, 2011, an Administrative Law Judge's Ruling was issued approving SoCalGas' Motion<sup>1</sup> to shift: 1) \$16.959 million from its prior year's unspent funds to the 2011 weatherization subcategory; 2) \$8.880 million from its 2011 Gas Appliance subcategory to the 2011 weatherization subcategory; and, 3) \$612,466 from the High Efficiency Force-Air Furnace Pilot program to the weatherization subcategory. SoCalGas will also utilize unspent funds from its 2010 ESA Program for the increased costs incurred for the Training Center and Inspections category and the Outreach and Assessment, and In-Home Energy Education subcategories. SoCalGas' ability to utilize unspent funds from previous program years is in compliance with the rules set forth in D.08-11-031 and as modified by D.10-10-008.<sup>2</sup>

In addition, Ordering Paragraph 2 of a Joint Ruling of Assigned Commissioner and Administrative Law Judge on The Joint Emergency Motion of The East Los Angeles Community Union, Et Al. to Continue The Low Income Energy Savings Assistance Program for Southern California Gas Company, authorized SoCalGas to utilize an amount not to exceed that which is necessary from the bridge funding authorized for January 1, 2012 to June 30, 2012 under D.11-11-010 for any other 2011 program expenditures exceeding the 2011 authorized Energy Savings Assistance Program budget. SoCalGas estimates that it will need to utilize \$2.9 M of its 2012 Bridge Funding for its 2011 program expenditures.

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<sup>1</sup> Motion of Southern California Gas Company (U 904G) to Shift Energy Savings Assistance Program Funds, dated October 24, 2011.

<sup>2</sup> Section 20 and O.P. 85, as modified by D. 10-10-008

## 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 December, SoCalGas combined efforts to provide its Energy Savings Assistance Program contractor network with an additional 129 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 such as: 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 tracking 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>3</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

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<sup>3</sup> The HEAT System is SoCalGas' Energy Savings Assistance Program database used to track program activity and expenditures.

of WNA leads that do not result in an enrollment, (i.e., “unable to contact,” and “customer refused”).

The canvassing lists generated in December 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 28,367 customer addresses, of which 15,154 (53%) are potentially eligible based on Energy Savings Assistance Program income eligibility criteria. Additionally, based on SoCalGas data, 5,999 of the 28,367 (21%) addresses are in targeted self-certification PRIZM codes<sup>4</sup>.

<b>Number of WNA Events per City</b>	<b>Contractor</b>
Ontario – 4; Montclair – 4	<b>Reliable Energy Management Company</b>
Pico Rivera – 2	<b>Richard Heath Associates</b>
Tulare – 31; Visalia – 48; Dinuba – 17	<b>Synergy Companies</b>
Baldwin Park – 12; Ontario – 2; Riverside – 5; Moreno Valley – 2; Corona – 2	<b>The East Los Angeles Community Union</b>

Through December 2011, SoCalGas and its Energy Savings Assistance Program contractors treated 5,261 homes through WNA activities.

### **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.

#### **Ethnic and Mass Media Campaign**

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<sup>4</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.

SoCalGas conducted a month long ethnic and mass media campaign targeting potential eligible low income English, Spanish, African American and Asian customers. The campaign began in November and concluded December 7<sup>th</sup>. The Asian component of the campaign targeted 104,640 Chinese, Korean, Vietnamese and Filipino customers via direct mail. Over 26,200 emails were delivered to Chinese, Vietnamese and Korean customers through the online channel. The campaign to the Filipino community (in English) was to partner with Seafood City supermarket store which is a popular store that connects with the consumer and is seen as a trustworthy source for ethnically relevant information. There were seven total locations spread out in the Los Angeles County and flyers on the Energy Savings Assistance Program were handed to the consumer by the cashier or included in grocery bag. Each location has an estimated 10,000 consumer foot traffic per week.

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

No bill insert/onsert campaigns were conducted during the month of December.

**Energy Savings Assistance Program Direct Mailings**

No direct mail campaigns were conducted during the month of December.

**Energy Savings Assistance Program Outbound Dialing**

No Automated Voice Messaging Campaign (AVM) was conducted in the month of December.

**Energy Savings Assistance Program Web Activities**

In December, SoCalGas sent an electronic email to 6,295 customers in which Customer Assistance program information was available to view. 27,933 new customers with an email address were targeted to receive a welcome e-mail from SoCalGas. The email blast to these customers included information about SoCalGas' assistance programs and encouraged customers to apply for CARE and the 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 December 31, 1,098 customers completed the on-line English Energy Savings Assistance Program request form.

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

**December 3, 2011 - City of San Fernando Xmas Tree Lighting Ceremony**

SoCalGas participated for the first time at San Fernando's Christmas tree lighting ceremony. It was estimated that over 200 people attended the event and were able to walk and enjoy early evening hours. Over 100 Customer Assistance Program and Energy Efficiency brochures were distributed to interested parties that visited SoCalGas' booth.

**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 from leveraging with CSD for the month of December. 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 low-income energy efficiency programs in PY2011.

Imperial Irrigation District (IID) and SoCalGas continue to canvass joint territory for the Energy Savings Assistance Program leveraging agreement. Through

2011, SoCalGas Energy Savings Assistance contractors have treated 98 customer homes with program measures from both low-income programs.

In addition, SoCalGas and Burbank Water and Power (BWP) also continue to canvass joint territory and will report results accordingly.

Lastly, SoCalGas and Eastern Municipal Water District (EMWD) have completed a leveraging agreement where EMWD provides 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 have continued throughout 2011. As a result of this agreement SoCalGas' Energy Savings Assistance Program has received rebates totaling more than \$126,500 for High Efficiency Clothes Washers installed in SoCalGas and EMWD joint service territory through December 2011.

## **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.

SoCalGas continued its internal training programs which contribute to the goals of workforce development. 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:

SoCalGas Skill-Level Test Results						
	August	September	October	November	December	YTD Total
Attended Testing	41	38	35	16	0	451
Passed Test	40	37	32	14	0	346
Pass Rate	97.6%	97.4%	91.4%	87.5%	0.0%	76.7%

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.

SoCalGas Enrollment and Assessment Training						
	August	September	October	November	December	YTD Total
Attended Class	22	30	34	17	0	286
Passed Class	22	30	32	17	0	279
Badged	22	30	32	17	0	271
Census Attendees	3	3	0	0	0	23
Retention Rate	100%	100%	94.1%	100%	0.0%	94.76%

The 5-day class covers utility-specific items related to policies, security process and overall customer service standards as well as for leveraging opportunities amongst other low-income programs. A final exam must be passed for an outreach specialist to be registered and receive a SoCalGas identification badge. The year-to-date total for badged outreach specialists for SoCalGas is 271. The classes are held at SoCalGas' Energy Resource Center located in Downey, California.

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

Class Type	September		October		November		December		YTD Total	
	No of Classes	No of Students								
<b>Initial</b>	4	22	2	8	5	7	1	2	60	234
<b>Refreshers</b>	0	0	0	0	0	0	2	2	12	18
<b>NGAT 5-Day</b>	0	0	2	3	0	0	1	14	14	149
<b>Grand Total</b>	4	22	4	11	5	7	4	18	86	471

**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	\$2,723,894	72%
Proc., Certification and Verification	\$1,248,928	\$1,240,666	99%
Information Tech./Programming (1)	\$522,554	\$524,622	100%
Pilots (2)	N/A	N/A	N/A
Measurement and Evaluation	\$17,192	0x	0%
Regulatory Compliance	\$236,919	\$241,863	102%
General Administration	\$604,963	\$576,699	95%
CPUC Energy Division Staff	\$171,500	\$43,016	25%
Cooling Centers (3)	N/A	N/A	N/A
<b>Total Expenses</b>	<b>\$6,587,988</b>	<b>\$5,388,649</b>	<b>82%</b>
<b>Subsidies and Benefits (4)</b>	<b>\$135,901,649</b>	<b>\$129,609,418</b>	<b>95%</b>
<b>Total Program Costs and Discounts</b>	<b>\$142,489,637</b>	<b>\$134,956,179</b>	<b>95%</b>

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

<b>CARE Penetration</b>		
<b>Participants Enrolled</b>	<b>Eligible Participants</b>	<b>Penetration rate</b>
1,716,495	1,847,296	<b>92.9%</b>

**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**

During the month of December SoCalGas ran a final, year-end campaign to call customers who were not on the CARE program, but who might be eligible. On the weekend of December 3, approximately 65,000 customers were called. By the end of that campaign 1,000 customers enrolled in CARE.

In addition, SoCalGas continued with its monthly campaign to call existing CARE customers who are due to recertify their eligibility. Over 32,000 customers were called, and 5,050 recertified their eligibility. (When possible, SoCalGas also emails customers who need to recertify; this campaign is described in the next section.)

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

During December approximately 8,732 new customers filled out applications online to enroll in the CARE program; There were 2,777 new enrollments. In addition, 1,463 existing customers re-certified their eligibility through the company website.

SoCalGas references its website in virtually all communications. In addition, because more and more SoCalGas customers have provided the company with an email address, SoCalGas is increasing its email communications. Links to the company website are prominent in these emails. Finally, SoCalGas sent an email to 10,680 customers who were due to recertify their CARE eligibility (and who had previously supplied the company with an email address). This email -- and conventional mail communications to such customers -- provides a link to the company website where the customer can recertify online.

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

To reach customers who are “missed” by traditional outreach (bill inserts, phone campaigns, direct mail, etc.), SoCalGas’ employs a third-party contractor to canvass targeted neighborhoods to enroll customers in CARE. The canvassers

are bilingual (English and Spanish.) During the month of December, door-to-door outreach returned applications for 1,745 customers; 1,320 were subsequently enrolled.

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.

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

There were no direct mailings during the month of December. Year-to-date, there have been approximately 600,000 direct mail letters sent to customers who may be eligible for the CARE program. Year to date, there have been 28,518 new enrollments through direct mail campaigns.

### **CARE Bill Inserts**

There was no bill insert in December. Activity from the October bill insert resulted in 2,110 returned applications in December for a total enrollment of 1,258. There were 12,307 enrollments from bill inserts throughout 2011.

### **Outreach by Field Employees**

Beginning with the pilot-lighting season (late October), field employees began distributing to customers a bilingual (English/Spanish) leave-behind pamphlet. The pamphlet describes Customer Assistance Programs, and, thus far, over 100,000 pamphlets have been left with customers. An additional 340,000 pamphlets were delivered to the operating bases in December.

### **CARE Mass Media Campaign**

From November 7 to December 4 SoCalGas ran an Internet-based mass media campaign to create awareness of its Customer Assistance programs. SoCalGas communications worked with its agency to develop a campaign that placed

CARE messages on the “30 second pre-roll” that precedes online viewing of news or entertainment pieces. In certain cases, the agency was able to negotiate a persistent banner that stayed open during the viewing of the video content. The agency was instructed to place messages on websites that would provide the best reach to low-income customers. SoCalGas has not yet received tracking results from the media agencies.

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

To ensure continued increases in CARE enrollments and to retain customers already participating in CARE, SoCalGas shares customer enrollment information with other utilities such as Southern California Edison, San Diego Gas & Electric, Pacific Gas and Electric, and the Los Angeles Department of Water and Power. During the month of December, 9,371 customers were enrolled in SoCalGas’ CARE program as a result of inter-utility data sharing activities. Additionally, CARE shares data with internal programs such as SoCalGas’ Energy Savings Assistance Program and the Gas Assistance Fund. Intra-utility efforts in December generated 2,173 CARE enrollments.

Coordinating the CARE program with other related low-income programs not only results in higher program participation rates, it also helps increase Post Enrollment Verification (“PEV”) activities when customer information is shared with programs such as LIHEAP. Since LIHEAP requires upfront proof of income and is a qualifying Categorically Eligible program, once CARE receives LIHEAP customer data, those customers are considered automatically eligible and their “pre enrollment verification“ is used by SoCalGas to meet CARE’s PEV requirements. As a result of leveraging activities during December 2011, 1,380 LIHEAP customers were enrolled in SoCalGas’ CARE program.

### **2.3 CARE Recertification Complaints**

There were no recertification complaints during the month of December.

### **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