



Implementation of SDG&E's & SoCalGas' 2009 – 2011 LIEE and CARE Programs

Low-Income Oversight Board Meeting
September 29, 2009
Oakland, CA



Initiatives Driving the SDG&E & SoCalGas LIEE Programs

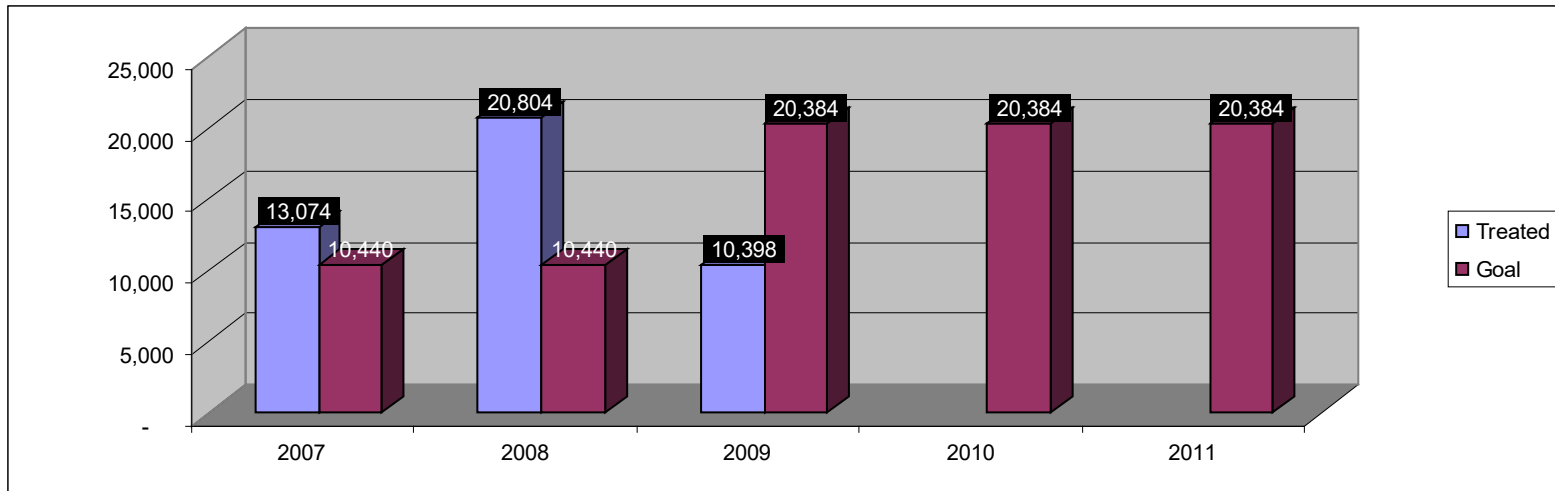


- Fully support the **programmatic initiative**:
“By 2020, 100% of eligible and willing customers will have received all cost effective Low Income Energy Efficiency measures.”
- Increase collaboration among and **leveraging** of other low-income programs and services
- **Integrate** LIEE programs with energy efficiency and other demand-side management programs
- Focus programs on customers with **high energy use, burden , and insecurity** while continuing to serve all eligible low-income populations

LIEE Program Units/Budgets 2007 – 2011 As of July 2009



SDG&E

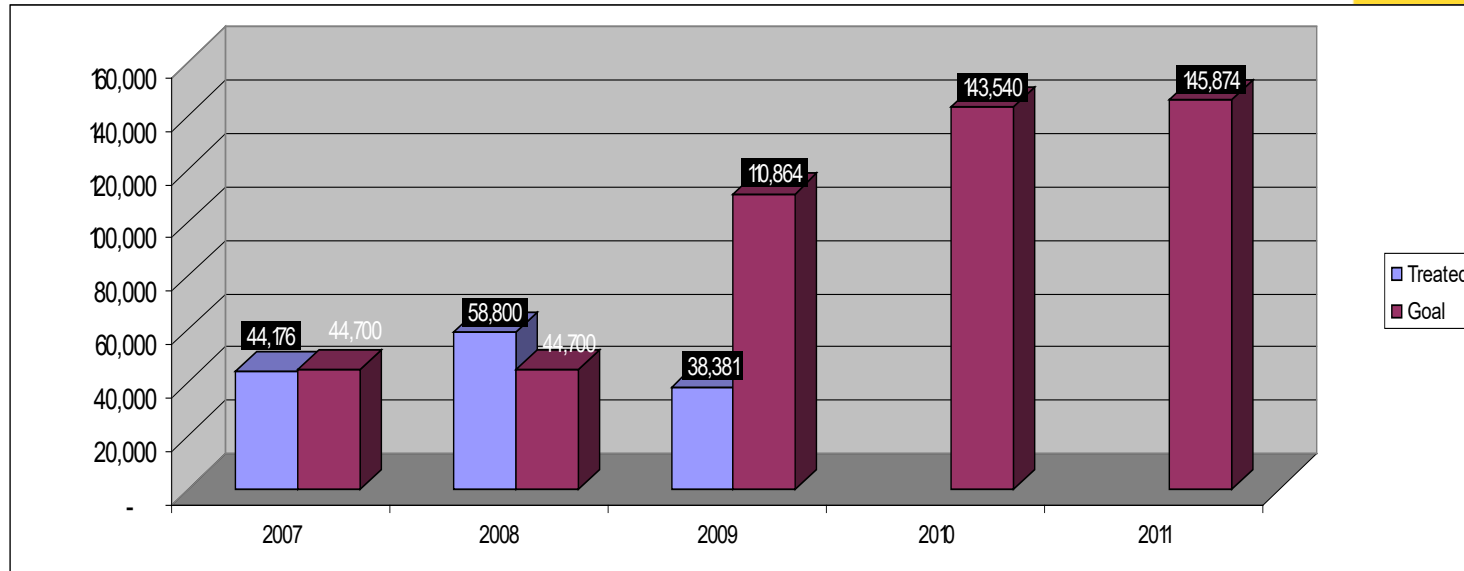


	2007	2008	2009	2010	2011
Goal	10,440	10,400	20,384	20,384	20,384
Treated	13,074	20,804	10,398		
Expended/Budget	\$11,983,364	\$16,420,247	\$21,184,009	\$21,184,009	\$20,327,606

LIEE Program Units/Budgets 2007 – 2011 As of July 2009



SoCalGas



	2007	2008	2009	2010	2011
Goal	44,700	44,700	110,864	143,540	145,874
Treated	44,176	58,800	38,381		
Expended/Budget	\$27,097,166	\$34,662,899	\$62,571,908	\$76,872,816	\$78,256,269

SDG&E LIEE Program Update



Program Summary as of July 31, 2009

	Authorized / Planning Assumptions	Actual to Date	%
Budget	\$21,184,008	\$8,009,017	38%
Homes Treated	20,000	10,398	52%
kWh Saved	8,887,914	3,046,827	34%
kW Demand Reduced	2,010	338	17%
Therms Saved	478,745	113,944	24%
Greenhouse Gas Emissions Reduced (Tons)	7,661	2,342	31%



SoCalGas LIEE Program Update



Program Summary as of July 31, 2009			
	Authorized / Planning Assumptions	Actual to Date	%
Budget	\$62,571,908	\$22,295,314	36%
Homes Treated	110,864	38,381	35%
Therms Saved	2,564,567	843,454	33%

SDG&E Leveraging Update



- SDG&E has just signed contracts with the three LIHEAP agencies serving San Diego and Southern Orange County which will enable them to fully leverage LIHEAP home with LIEE homes
- The agreements facilitate the following features:
 - Allows for the Categorical Enrollment of LIHEAP customers into the LIEE program
 - Allows each agency to split the installation of qualified measures between the LIHEAP and LIEE programs
 - Utilizes existing fee structures of each program
 - Minimizes paperwork by allowing LIHEAP paperwork to satisfy most LIEE requirements
 - Requires duplicate data be entered into both LIHEAP and LIEE program databases
 - Does not allow for targeted self certification and/or Categorical Eligibility minimizing the number of LIEE “sourced” homes that can be leveraged with

SoCalGas Leveraging Update



- SoCalGas continues to meet with several non-IOU utilities that provide electric and water services to SoCalGas customers to identify opportunities to leverage one another's low-income energy efficiency programs

SoCalGas Leveraging



- SoCalGas and the Imperial Water District signed an agreement in June to provide gas, electric, and water measures to low income customers in their overlapping service territories
- SoCalGas and Burbank Water & Power are negotiating an agreement to provide measures to low-income customers who reside in their overlapping service territories
 - This agreement is expected to start in the 4th quarter and will provide customers with a comprehensive bundle of measures including gas, electric and water
- SoCalGas continued working with Los Angeles Department of Water and Power (LADWP) to identify opportunities where both utilities could serve their joint low-income customers at the same time.
 - SoCalGas would provide low-income gas energy efficiency measures and LADWP would provide electric and water measures to customers who reside in their overlapping service territories

SDG&E Integration Update



- SDG&E received referrals from the Customer Call Center (CCC) and the LIEE program to achieve the following CARE enrollments:
 - 9,500 enrollments YTD from the CCC
 - 1,508 enrollments YTD through LIEE
- Synergy Companies has begun marketing both energy efficiency rebates and LIEE in mobile home parks ensuring qualified customers are offered all available measures under both programs.
- SDG&E developed an integrated “masthead” to be used for all low income communications.

SoCalGas Integration Update



- SoCalGas received referrals from the CCC and the LIEE program to achieve the following CARE enrollments:
 - 8,800 enrollments YTD from the CCC
 - 981 enrollments YTD through LIEE
- Furthermore, SoCalGas LIEE and EE continue to integrate its internal resources to maximize LIEE leads while screening out non-eligible LIEE customers for referral to EE.



Whole Neighborhood Approach

Whole Neighborhood Approach – SDG&E



- SDG&E's Whole Neighborhood Approach (WNA) was developed in early 2009 using Census and PRIZM code data to identify neighborhoods that have a high potential for LIEE eligibility
- To contact these potential customers, SDG&E is implementing a comprehensive direct marketing plan which will include direct mail, automated outbound calling and door-to-door canvassing
- This three tiered approach is designed to heighten program awareness and generate referrals from the customers targeted to be served

Whole Neighborhood Approach – SDG&E



SDG&E LIEE Contact Attempts - Not at Home

1/1/09-7/31/09

	Automated Voice Messaging	Door-to-Door Canvassing	Total
Attempt	48,672	117,304	165,976
Not Home ¹	23,185	103,438	126,623
% Not at Home	48%	88%	76%
Home	25,487	13,866	39,353
Enrolled	474	6,422	6,896
% Enrolled vs Attempted	1%	5%	4%
Refused ²	3,288	7,444	10,732
% Refused vs Attempted	7%	6%	6%

¹ For Canvassing equals customers who were not available to enroll but did not outright refuse.

² For AVM equals those customers who hung up and/or those disconnected the call after the message began. Not marked as "refused" in HEAT database. Eligible for additional marketing attempts.



Whole Neighborhood Approach – SDG&E



Whole Neighborhood Approach

San Diego Gas & Electric

July 2009

Neighborhood (County, Zip code, Zip+7 etc.) Targeted ¹	Total Residential Customers ²	Total Estimated Eligible ³	Total Treated 2002-2008	Total Treated YTD
Spring Valley (zip code 91977-40)	370	198	108	50
Spring Valley (zip code 91977-41)	523	294	170	73
El Cajon (zip code 92020-50)	447	264	204	2
El Cajon (zip code 92020-54)	370	215	51	12
El Cajon (zip code 92020-61)	410	198	182	1
El Cajon (zip code 92020-66)	418	218	148	2
El Cajon (zip code 92020-74)	530	208	140	1
El Cajon (zip code 92020-76)	537	251	179	6
El Cajon (zip code 92021-47)	472	231	136	8
El Cajon (zip code 92021-55)	408	145	95	4
El Cajon (zip code 92021-56)	312	118	76	11
El Cajon (zip code 92021-61)	429	236	212	7
El Cajon (zip code 92021-68)	555	321	326	44
Fallbrook (zip code 92028-31)	429	226	114	3
Fallbrook (zip code 92028-32)	374	188	44	5
Lakeside (zip code 92040-17)	177	50	9	4
San Marcos (zip code 92078-36)	318	91	37	52
San Marcos (zip code 92078-37)	491	237	132	14
San Diego (zip code 92101-67)	763	228	-	5
San Diego (zip code 92101-68)	575	229	3	19

Whole Neighborhood Approach – SoCalGas



- SoCalGas' WNA continues to be enhanced with information to identify neighborhoods that have a high potential for LIEE eligibility and to develop internal capacities to better track program implementation and monitor progress.
- All WNA canvassing lists utilize the Zip+7 geographic segmentation strategy, targeting smaller geographic areas and tracking the success of these efforts over time.
- *Preliminary* data show the following “not-at-home” and “not interested” rates for WNA efforts in Wilmington and La Habra:
 - Wilmington: “not-at-home” = 47%, “not interested” = 20%
 - La Habra: “not-at-home” = 83%, “not interested” = 4%

Whole Neighborhood Approach – SoCalGas



LIEE Table 7

**Whole Neighborhood Approach
Southern California Gas Company**

Jul-09

A	B	C	D	F
Neighborhood (County, Zipcode, Zip+7 etc.) Targeted	Total Residential Customers	Total Estimated Eligible	Total Treated 2002-2008	Total Treated Year-to-Date
Neighborhood in zip code 92801 - CAPOC	1811	1084	89	8
Neighborhood in zip code 90744 - REMCO	6994	3008	259	466
Neighborhood in zip code 90631 - TELACU	1234	878	52	115
Neighborhood in zip code 90631-47 - TELACU	465	215	14	51
Neighborhood in zip code 90631-48 - TELACU	253	107	71	14
Neighborhood in zip code 91010-25 - TELACU	478	190	17	0
Neighborhood in zip code 90631-61 - TELACU	198	86	31	5
Neighborhood in zip code 90631-68 - TELACU	252	117	41	6
Neighborhood in zip code 91016-31 - REMCO	398	142	25	1
Neighborhood in zip code 91016-41 - REMCO	368	185	84	6
Neighborhood in zip code 90022-12 - TELACU	467	305	215	8
Neighborhood in zip code 90631-64 - TELACU	272	99	TBD*	10



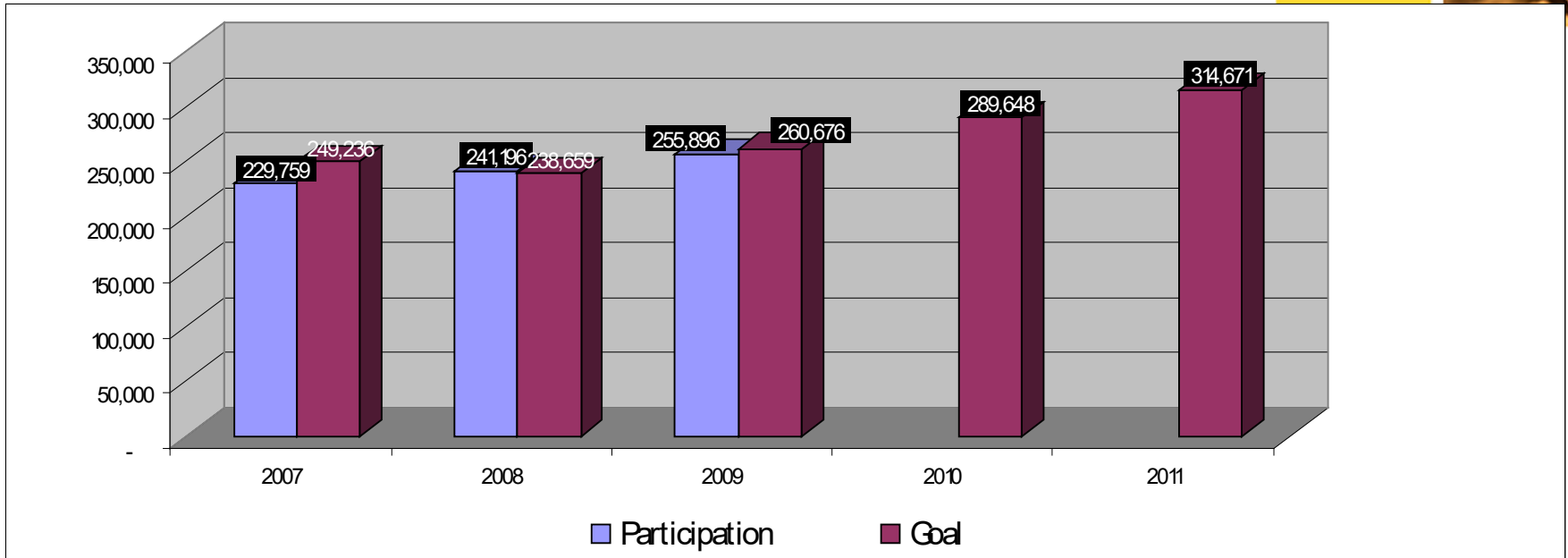


CARE Updates

CARE Program Participation/Goals 2007 – 2011 as of July 31, 2009



SDG&E



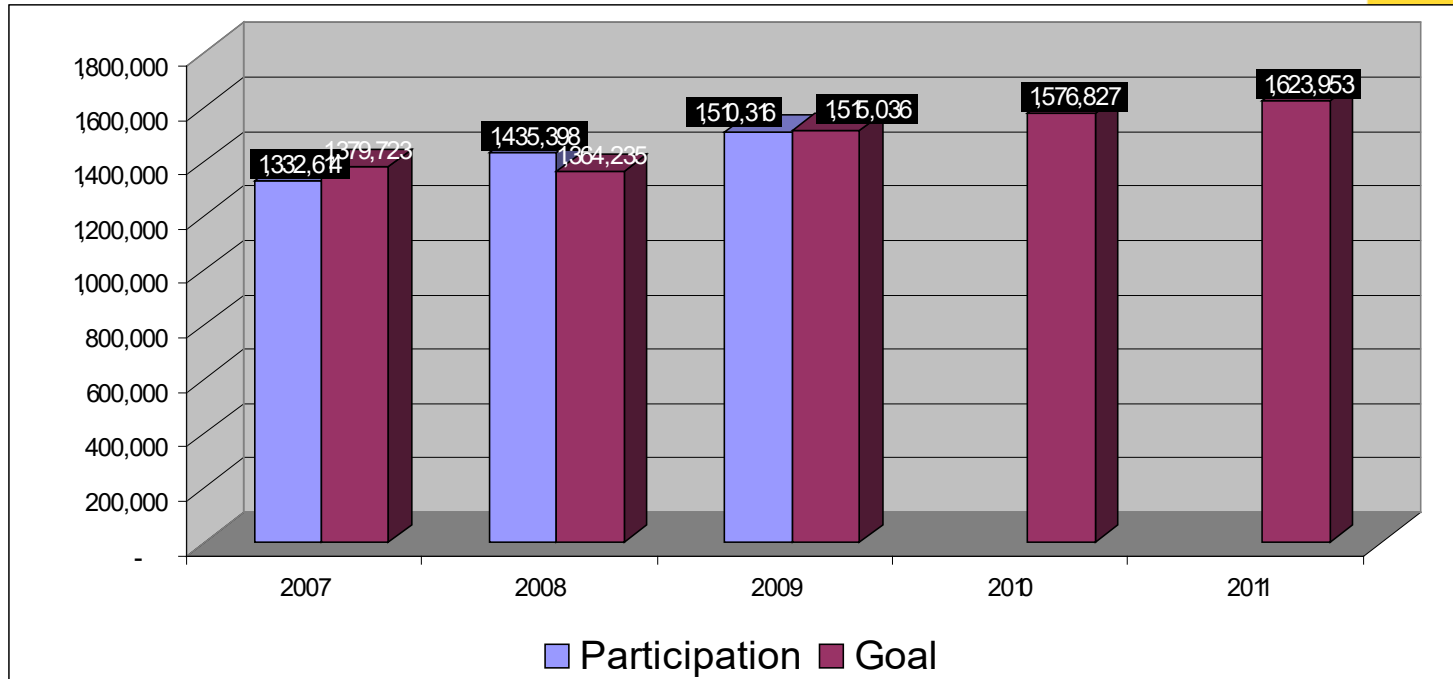
	2007	2008	2009	2010	2011
Goal*	249,236	259,198	260,676	289,646	314,671
Participation	229,759	241,196	255,896		

Participation goals have been revised to reflect the Commissions 90% penetration goal per D. 08-11-031

CARE Program Participation/Goals 2007 – 2011 as of July 31, 2009



SoCalGas



	2007	2008	2009	2010	2011
Goal*	1,379,723	1,364,235	1,515,036	1,576,827	1,623,953
Participation	1,332,614	1,435,398	1,510,316		

Participation goals have been revised to reflect the Commissions 90% penetration goal per D. 08-11-031

CARE Enrollments & Penetration Rates as of July 31, 2009



	Participants Enrolled	Eligible Participants	Penetration Rate
SDG&E	255,896	336,751	76%
SoCalGas	1,510,316	1,770,067	85%



LIEE and CARE Outreach Activities June – July 2009

Outreach Activities for SDG&E



- Provided information about SDG&E's low-income programs at the following community events:

- **San Diego Unified School District's School Lunch Program Kick Off Event**

- Over 1,300 people attended
- 30 CARE enrollments

- **Cool Zones Kick Off Event**

- 27 CARE Applications were completed during the event

- **Other Events**

- Conducted a TV interview with Azteca America to inform viewers about CARE and LIEE
- ResponseLink San Diego (Alert Services for Disabled)
- Veteran's Village San Diego
- International Rescue Committee, Crawford High School

Outreach Activities for SDG&E



- Direct Mail

LIEE

- SDG&E conducted a total of 8 direct mail campaigns targeting a total of 62,827 potential LIEE-eligible households. A total of 1,551 LIEE leads were generated from the June and July campaigns and an additional 382 leads were received from prior month's campaigns.

CARE

- CARE information was mailed to over 26,000 low income households. 500 enrollments resulted from this effort as of the end of July.
- Large print applications were mailed to 5,000 visually impaired customers in low income households.
- Bilingual (English/Spanish) applications to all residential customers as part of the CARE annual notification.

Outreach Activities for SDG&E



Integrated Direct Mail Campaign

- A direct mail was sent to over 570,000 residential customers who were projected to have higher energy bills this summer due to changes in electric rates over last year.
- Three different letters were developed for:
 - Moderate users (800 kWhs+)
 - High users (1,000 kWhs+)
 - CARE customers with electric usage in excess of 500 kWhs.
- Included in the mailing was a brochure outlining energy costs for using various appliances and electronics in the home; a breakdown of electricity costs by tier, and information about how much a customer's bill could be reduced if usage was reduced by 25%
- Twenty different versions of the brochure were created so that information could be customized for each specific customer group based on their usage, climate zone, etc.



Outreach Activities for SDG&E



CARE Automated Outbound Dialing Campaigns

- Outbound dialing campaigns targeted nearly 54,000 low income households and resulted in 3% new enrollments.
- An outbound dialing campaign to 4,150 CARE customers due to recertify their CARE eligibility was successful in recertifying 22% of those targeted.



CARE & LIEE Advertising Campaign – SDG&E



- SDG&E launched an six week advertising campaign
 - Focused on educating customers about the numerous ways SDG&E can provide assistance, especially during this time of economic hardship
 - Included radio spots, bus shelter poster, ads in targeted community publications
- The campaign will be followed by the launch of specific LIEE and CARE campaigns which will be focused on generating enrollments for the programs.

Outreach Activities for SoCalGas



Provided information about SoCalGas' low-income programs at the following community events:

- KABC-AM/KLOS-FM interview on Bill Assistance
- 7th Annual Schleroderma Walkathon
- Wilmington Family Picnic
- Department of Public Social Services (DPSS) Community Meeting
- La Campesina 26th Anniversary Celebration
- Community Health & Resource Fair, Los Angeles
- Community Coalition's "A Place to Start" Resource Fair
- Super CPR Red Cross Event, Kern, CA
- City of Covina Job Fair
- City of Artesia – "Going Green" Presentation
- City of Norco – Customer Assistance Briefing
- 2009 Gas Company Political Dialogue

Outreach Activities for SoCalGas



- La Opinion and XHAS-TV (Telemundo) Story on Customer Assistance Programs
- Radio Broadcast on Antelope Valley's Newstalk 1380 KOSS
- Money-Saving Opportunities for Non-Profit Organizations
- Joint SoCalGas/SoCal Edison Workshop at City of Whittier Senior Center
- Woodrow Wilson Elementary School "Back to School Day"
- Lake Arrowhead Government Relations Meeting
- Riverside County Workforce and Economic Development "Jobseeker Resource Fair"
- The Westminster Green Expo

Outreach Activities for SoCalGas



- **Direct Mail**

LIEE

- SoCalGas conducted one targeted direct mail to 4,264 CARE customers with higher than average annual therm usage and potentially LIEE-eligible households resulting in 39 enrollments.
- Two direct mailings were sent to over 50,000 submetered tenants of mobile home parks and their owners. To inform them of the change in 2010 of the recertification requirements from one year to two years and not to expect a recertification request until 2012.

CARE

- CARE information was mailed to over 350,000 low income households. As of July 31, 2009, 26,000 customers have enrolled in the CARE program as a result to targeted direct mail.
- Future targeted direct mail campaigns are being tailored to recently unemployed customers.

Outreach Activities for SoCalGas



- LIEE AVM Campaign
 - Over 2,700 CARE PEV customers have been contacted resulting in 115 LIEE enrollments
- LIEE Web Activities
 - Launched an English electronic LIEE request form on the website. As of July 31, 2009, 2,970 potential leads for the LIEE program have been received
 - Website contains a video featuring No-Cost Home Improvement services through LIEE in both English and Spanish
 - Launched an email campaign to 200,000 customers enrolled in “My Account”

Outreach Activities for SoCalGas



- CARE AVM Recertification Campaign
 - Over 7,256 re-enrolled and 24,717 have successfully completed the recertification process as of July 31, 2009
- CARE Web Activities
 - Internet based outreach activity has exceed 2008 year end results and as of July 31, 2009, 16,736 have enrolled in CARE
 - Internet based outreach activities includes a monthly newsletter (distributed to 380,000) with a link to customer assistance programs. Promoting the CARE web site, various CARE collateral materials and public service announcements

LIEE Advertising Campaign – SoCalGas



- SoCalGas launched a six week advertising campaign
 - Focused on promoting LIEE No-Cost Energy-Saving Home Improvements
 - Designed to draw customers to the LIEE web site or to call toll-free
 - Included in bus shelter and interior bus cards , and ads in targeted community publications



Detailed information about CARE and LIEE program achievements can be found in SDG&E's and SoCalGas' Monthly Reports