



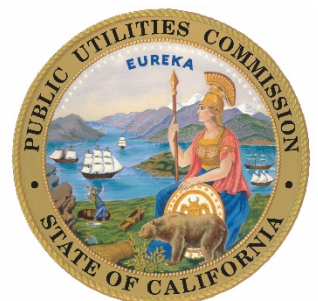
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WORKSHOP REPORT ON THE CALIFORNIA ALTERNATE RATES FOR ENERGY (CARE) AND THE ENERGY SAVINGS ASSISTANCE (ESA) PROGRAMS OF THE SMALL AND MULTI- JURISDICTIONAL UTILITIES (SMJUs - A.15- 02-001) AND THE INVESTOR OWNED UTILITIES (IOUs - A.14-11-007)

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CALIFORNIA PUBLIC UTILITIES COMMISSION – ENERGY DIVISION

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Introduction

On August 19, 2015, the California Public Utilities Commission in conjunction with the Low Income Oversight Board (LIOB) held a joint workshop/meeting and addressed the California Alternate Rates for Energy (CARE) and the Energy Savings Assistance (ESA) Programs.

The LIOB facilitated discussion of the large Investor Owned Utilities' (IOUs' - A.14-11-007, et al), and the Small Multi-Jurisdictional Utilities' (SMJUs' - A.15-02-001, et al) CARE and ESA Programs, focusing on administration, marketing and outreach efforts, water-energy nexus and drought-mitigation initiatives, multifamily housing measures and strategies, and the effect of the Commission's ESA program rules on implementation, unspent balances, and achievement of program objectives.

The joint workshop/meeting took place at the City of Santa Ana Civic Center, from 9:40am until approximately 1:15pm; participants were also able to join via teleconference. This workshop report memorializes the workshop presentations and discussions, and includes the workshop presentations in the Attachment.

Workshop Notes

LIOB Members and Commission Decision-Makers in Attendance

Commission Decision-Makers For Purposes of the CPUC ex parte rules

- Commissioner Catherine J.K. Sandoval
- Administrative Law Judge (ALJ) W. Anthony Colbert

LIOB Members

Robert Castaneda, Ortensia Lopez, Patricia Watts, Charlie Toledo, Larry Gross, Dave Stephenson, Benito Delgado-Olson and Daniel Rendler

Some LIOB members also represent parties in one or both of the proceedings. Their party status, if any, is noted in the list below.

- Chairman Robert Castaneda
 - Proteus Inc., represented by Chairman Castaneda, is a party to A.14-11-007. It is not a party to A.15-02-001. Proteus is an ESA contractor to both SMJUs and IOUs. It is also a member of La Cooperativa, which does LIHEAP contracting.
- Ortensia Lopez
 - The Energy Efficiency Council, represented by Board Member Lopez, is a party to both proceedings (A.14-11-007 and A.15-02-001). The Energy Efficiency Council is an intervener comprised of subcontractors for low-income energy efficiency programs.
- Daniel Rendler
 - Southern California Gas Company, represented by Board Member Rendler, is a party to A.14-11-007.
- Dave Stephenson
 - California Water Association (CWA), represented by Board Member Stephenson, is a party to A.14-11-007; CWA is focused on water-energy nexus issues.
- Other LIOB members (none of whom have party status)

SMJU Workshop – A.15-02-001, et al

Commissioner Sandoval opened the workshop with a summary of the topics to be covered.

Southwest Gas

Presenter: Celine Apo, Program Manager for CARE & ESA programs

Presentation

Ms. Apo provided a brief overview of Southwest Gas, and then moved on to discuss the CARE and ESA programs in particular. Southwest Gas had over a 90% penetration rate in the prior program cycle, and

Ms. Apo noted that this penetration level is expected to be maintained in the current cycle. Southwest Gas has doubled the annual number of homes treated with the ESA program in 2014, over 2012 and 2013. 2015 homes treated are anticipated to be 2100 (vs. approximately 4000 in 2014), but Southwest Gas states that it plans to increase homes treated in 2016-17 to “catch up” the number of homes treated over the entire cycle. Southwest Gas stated that it also intends to increase leveraging efforts with other utilities and programs such as Liberty Utilities, Bear Valley Electric Service, Lifeline, and LIHEAP.

Southwest Gas listed the water measures it provides, described its drought-related bill inserts and ESA energy education flyer, and described water agency coordination efforts. Ms. Apo stated that Southwest Gas treats multifamily customers in the same manner as other customers, and that it also promotes the Commercial Rebates program for common areas. Ms. Apo reported that for ESA, Southwest Gas has \$410,526 of 2014 unspent (carryover) funds; \$3,172,693 of 2015 bridge funding budget and \$3,583,219 of 2015 authorized budget with carryover. Southwest Gas anticipates spending the entire 2015 authorized budget with carryover to treat as many homes as possible. As of June of 2015, Southwest Gas has treated 1,119 homes. Southwest Gas indicated that it has maintained over a 90% penetration rate, and that it plans to continue the same level of penetration rate through the end of 2017. Finally, Ms. Apo described Southwest Gas’ marketing and outreach initiatives.

Q&A

Chairman Castaneda asked why the number of ESA homes treated has increased. Ms. Apo stated that this has occurred because two new contractors were added (including Proteus, represented by Chairman Castaneda). Chairman Castaneda asked what needs might be similar/different for the ESA programs across the SMJUs and large IOUs. Ms. Apo stated that Southwest Gas has taken recommendations from the 2013 LINA, but would appreciate expanding the scope of the LINA to more closely examine the differences in need in SMJU territories.

Board Member Gross asked about differences in water measures in multifamily homes as compared to other home types. Ms. Apo responded that water-saving measures are generally the same across dwelling type. Ms. Apo stated that Southwest Gas tracks which customers participate in ESA, by dwelling type, but not ESA eligibility by dwelling type. Mr. Gross stated that tracking both would be useful. Southwest Gas also discussed its outreach to property owners, and agreed with Mr. Gross that property owner approval is a barrier. Ms. Apo stated that common areas are not treated by ESA, but rather via commercial energy efficiency rebates.

Board Member Watts asked for more details as to how the new contractors increased homes treated. Ms. Apo stated that contractors do their own outreach, on top of Southwest Gas outreach. Ms. Apo said that the focus in outreach is on promoting ESA (and CARE) participation, with common space measures only promoted once a contractor is conducting the assessment on-site.

Commissioner Sandoval asked for more details on the reasons for the increase in homes treated and asked whether there are rule changes that would be helpful. Ms. Apo replied that the increase in homes treated is driven by the need to meet the homes treated goal for 2020, and is not due to any rule

changes. Commissioner Sandoval then encouraged Southwest Gas to explore the Commission's new water-energy cost calculator tool to assess whether additional water savings measures may be advisable. The Commissioner also referred to a past statement by Marin Clean Energy that water-saving measures may help address the barrier of landlord approval.

ALJ Colbert asked whether Southwest Gas considers the balance of energy and water savings for individual measures, and whether Southwest Gas asks water utilities to bear costs for measures that save significant quantities of water. Ms. Apo stated that this is not done; she added that Southwest Gas uses the cost-effectiveness calculations and proposals of the large utilities and does not do separate analyses. Commissioner Sandoval noted that a water utility contribution has not historically been required as part of the ESA program. She noted that ESA does not employ a cost-effectiveness test as the CPUC energy efficiency program does, but that cost-benefit is one factor to consider in design of the ESA program.

Bear Valley Electric Service (BVES)

Presenter: Danielle De Clercq, Program Manager for CARE & ESA programs

Presentation

Ms. De Clercq provided a brief overview of BVES and its service territory. She then summarized BVES' CARE and ESA penetration. She noted that the CARE high usage post-enrollment verification non-responses have significantly reduced BVES' CARE penetration. Ms. De Clercq discussed coordination efforts with Southwest Gas and the recent addition of a new ESA contractor. She stated that BVES intends to increase marketing for ESA to increase its brand identity and increase enrollments.

Ms. De Clercq then listed BVES's water-saving measures, discussed its coordination efforts with two local water utilities, mentioned website improvements related to the drought, and described flyers and a water-saving guide that the utility distributes.

Ms. De Clercq stated that multifamily, mobile home, and single family residents are all treated the same. Common area measures are funded via commercial energy efficiency programs. Being in a resort community, BVES stated that it is a challenge to find a local contractor, and that winter conditions can also be a barrier to contractor access. Ms. De Clercq reported that Bear Valley has \$638,744 of 2014 carryover funds; \$868,369 of 2015 budget with carryover and \$229,625 of 2015-2017 proposed budget. As of June 2015, Bear Valley has treated 99 homes, with the goal to treat 210 homes. Bear Valley plans to deploy a catch-up plan to use the carryover funds to meet the 2020 goal, and hopes to increase to 400 homes treated beyond 2016. BVES also discussed its marketing and outreach activities, such as bus advertisements and attending community events. BVES has also added online forms for customers to express interest in ESA participation.

Q&A

Chairman Castaneda asked how BVES plans to double its homes treated. BVES stated that it believes that the additional marketing initiatives will enable this increase. Additionally, BVES stated that there was previously a job vacancy that hindered BVES' ability to treat a large number of homes.

Board Member Toledo asked about outreach to seniors and ethnic minorities. BVES stated that it has been increasing outreach in general and will look into outreach to ethnic minorities. Board Member Lopez asked about CBO engagement. BVES stated that it attends events and meets with business owners and community members, presents to the mayor, and has presented at a community church, and in those ways connects with the community. Board Member Watts asked for more details on outreach and cold calling; BVES stated that the contractors are the primary ones doing that type of work, and that the contractors are not too far away to do in-person outreach.

Judge Colbert asked about how the decision was made to set a goal of 400 homes treated per year. BVES stated that it has 29,000 eligible customers and that based on its past homes treated, it feels it has a significant number of homes remaining to be treated, and that the 400 annual homes treated goal is aggressive but achievable. Judge Colbert asked whether or how this might impact unspent funds. BVES responded that it has requested funds to reach 200 homes, and will use carryover funds for the additional 200 homes. It stated that each home costs approximately \$1000 to treat. BVES also discussed its coordination efforts with local water agencies, at ALJ Colbert's request. Judge Colbert asked about coordination to ensure that both BVES and water agencies do not offer duplicative rebates on the same measures; BVES stated that this is coordinated via a joint water saving guide, and that because BVES is an electric utility, potentially duplicative water-saving measures such as low-flow showerheads are only rarely installed.

Board Member Lopez asked for further description of the high usage post-enrollment verification process and disconnection process. BVES stated that it hasn't tracked how many customers removed from CARE are later disconnected. In response to questioning from Chairman Castaneda, BVES stated that the CARE high-usage process has enabled it to better leverage ESA, and that water-saving measures are also a helpful incentive to participate.

Commissioner Sandoval asked whether BVES has encountered any particular barriers related to program rules. BVES did not recommend changes to program rules, beyond approval of LEDs for high-usage areas (to make the program more attractive to customers). BVES noted that CFLs are often the primary measure when a customer is not eligible for a refrigerator, and stated that many customers will back out of ESA participation once they find out they are ineligible for a refrigerator, because they don't necessarily like CFLs.

Liberty Utilities

Presenter: Lori Williams, ESA Program Manager

Presentation

Ms. Williams provided an overview of the utility and its service territory, highlighting that many dwellings are ineligible for ESA because they are vacation homes. Liberty recently reassessed its number of eligible customers, and found that the number of eligible customers is much higher than previously thought. As a result, CARE penetration has dropped from about 90% to only 53%. Liberty has requested an increased budget in its application to conduct more outreach and increase CARE penetration.

Liberty reported on its homes treated and unspent funds. Liberty is currently behind on its homes treated goals and plans to add a new contractor to increase the number of homes treated. In its application, Liberty has also requested increased ESA funds, to achieve a 63% increase in homes treated in the ESA program and more targeted outreach to underserved and rural communities in its service territory. The application also incorporates administrative costs that were not previously charged to the CARE program.

Ms. Williams then discussed the water-saving measures and other drought-related initiatives at Liberty, highlighting water/energy pumping savings related to avoiding removal of wastewater from the Lake Tahoe Basin as all wastewater is required by law to be removed from the Lake Tahoe basin, increasing the amount of energy needed to pump wastewater to an out-of-area treatment point. Ms. Williams described coordinated activities with the many local water utilities. She then discussed multifamily initiatives such as allowing landlords to sign a single agreement for multiple units and locations, installation of non-invasive measures without landlord approval, and outreach. She further noted that common area measures are covered under commercial energy efficiency programs.

Liberty presented a discussion of its unspent ESA funds of \$62,708 unspent from the 2012-2014 program cycle. In the 2012-2014 program cycle, Liberty treated 768 units (more than its goal of 660 units) and spent \$631,252 (of the \$693,962 available from carryover and newly authorized funds). Liberty had entered the 2012-2014 program cycle with \$91,502 in unspent funds from the prior program cycle, and Liberty indicated that some of that carryover funding was applied to make up for ESA fund collections being lower than expected in 2014 due to lower than forecast revenues.

Liberty recommended that the remaining unspent funds be utilized for measures to be installed in the coming program cycle, or possibly for water and energy saving drought mitigation measures such as low flow toilets, valve replacements, leak detection tablets, and enhanced installs of HE clothes washers. As of June 2015, Liberty noted that it has treated 41 homes, with the goal to treat 90 homes.

Liberty proposed a 5-fold budget increase for ESA targeted outreach (from \$13,244/year to \$63,275/year). Liberty stated that the best results seem to come from neighborhood canvassing, door-hangers, and mailers from contractors. Other outreach activities include bill inserts, ads, and coordination with CBOs and community events/businesses. Additional funding was requested for outreach to more rural communities, which Liberty stated are harder to reach and cost more to treat. Liberty also coordinates with Southwest Gas. Liberty is also mapping its ESA customers and target areas, to enable more targeted outreach. Ms. Williams then described CARE outreach and enrollment activities.

Q&A

Chairman Castaneda stated that the assessment recently conducted by Liberty seems similar to the forthcoming low income needs assessment (LINA). Ms. Williams stated that some of Liberty's customer needs are unique to their cold climate. Liberty stated that it conducted its assessment by hiring a consultant, Athens, to conduct demographic research with census data.

Board Member Toledo asked about CBO engagement. Ms. Williams responded that its ESA contractor is itself a CBO, but that it is not locally based due to the difficulty in finding an appropriate organization within the service territory. Board Member Toledo described the advantages of working with local CBOs, who know the population and come from the community. Ms. Williams described existing efforts to work with such CBOs, such as with a Hispanic community center, and a community services agency that works with a tribal group in the southern end of the service territory. Board Member Toledo suggested contracting with CBOs and not simply partnering.

Board Member Watts asked whether the ESA contractor is also a LIHEAP contractor; Ms. Williams responded in the affirmative. Board Member Delgado-Olson asked about enrollment targeting participants in other low income programs, and Liberty responded with its initiatives in those areas, such as coordination with Meals on Wheels. However, Ms. Williams stated that this outreach can be very costly due to the fact that there are many small communities to be reached. ALJ Colbert referenced the CHANGES program, which works with CBOs to increase customer awareness of CARE and ESA.

Board Member Gross asked about low-wage hotel workers, and Ms. Williams responded that a significant barrier is that this demographic moves frequently (for example, individuals who only work in the area for the summer), and as a result the residents may be less interested in ESA – or the home may already have been treated when a previous tenant lived there. Board Member Gross suggested outreach to hotels and to unions, in order to better reach these customers.

Commissioner Sandoval asked about lack of common area measures in multifamily dwellings. Liberty responded that it is happy to adopt measures adopted by the larger utilities, but that it does not have the resources to conduct its own analysis. Liberty stated that it has a relatively large number of apartment and condo complexes, though many condos are part of high-end resort complexes. Liberty does outreach to apartment complexes and to mobile home parks. Commissioner Sandoval commented that it will be important for the LINA study to consider differences between urban, suburban, and rural territories, including differences between the large IOUs' and SMJUs' rural territories.

Chairman Castaneda asked for more information on the installation of non-invasive measures without owner waiver. Ms. Williams stated that refrigerators are not replaced (because the refrigerator may or may not be owned by the tenant), but that lightbulbs, torchieres, and other minor measures may be installed. Board Member Gross suggested including refrigerators with proof of purchase by resident. Board Member Lopez asked about how much additional water could be saved if emergency drought measures were included. ALJ Colbert noted his concern for achieving an appropriate balance and justification if energy ratepayer funds are to be applied towards water ratepayer savings.

Pacific Power (PacifiCorp)

Presenter: Melissa Nottingham, Customer and Regulatory Manager

Presentation

Ms. Nottingham provided a brief overview of the utility and its service territory. She stated that 39% of Pacific Power's customers are low-income residential customers. Ms. Nottingham presented statistics

on CARE penetration (81%), ESA homes treated, program expenditures, and unspent funds. Pacific Power stated that it anticipates meeting its 2015 goal of 150 homes treated (currently at 77).

Ms. Nottingham then described Pacific Power's outreach activities and coordination with social services agencies, food banks, and senior centers. For example, CBOs that administer LIHEAP provide participant information, so that these customers can be automatically enrolled in CARE. Pacific Power has also found direct mailings to be effective, and will continue them. Pacific Power also plans to conduct a demographic/needs assessment. By the end of 2015, Pacific Power anticipates that 86% of eligible households will have been treated by ESA, with 91% treated by the end of 2017.

Ms. Nottingham noted that Pacific Power's customers do not have natural gas service, which reduces leveraging opportunities, and that the rural nature of the service territory also makes contractor treatment more difficult due to long drive times. Ms. Nottingham stated that most customers use propane or wood for heating.

Ms. Nottingham stated that Pacific Power works with mobile home park owners to distribute information to their tenants, who are submetered, and that it plans to encourage CBOs to identify and serve multifamily units. She then detailed the utility's water-saving measures and drought relief initiatives.

Q&A

Chairman Castaneda asked whether the particular regional challenges of the service territory are referenced in the application. Ms. Nottingham noted that the CBOs are particularly sensitive to the needs of the community, and that the planned needs assessment will also help the utility to improve its targeting. Board Member Toledo asked about considering overall dwelling costs, including both rent and electricity. Ms. Nottingham noted that Pacific Power is providing tips and training to CBOs so that they can better educate their communities about this issue.

Commissioner Sandoval asked Ms. Nottingham to list the unspent funds and annual budget for ESA, and to share its proposal for use of the unspent funds. Pacific Power stated that, through 2014, it has \$327,084 of ESA unspent funds; and \$674,990 in CARE; Pacific Power's ESA budget is \$950,000. Pacific Power further noted that it has treated 77 homes as of June 2015, with the goal to treat 150 homes. Ms. Nottingham also stated that Pacific Power would like to use its unspent funds to include high efficiency washers and additional measures such as thermostats. Pacific Power will also conduct more outreach via its ESA contractors, which are CBOs.

Public Comment

Vid Prabhakaran, Counsel for Liberty Utilities

Liberty has asked for funds for common area measures in its application (contrary to current policy of only including tenant-space measures in ESA), but is not sure what measures would be best. Liberty stated that it would like the Commission to specify which measures it should offer.

Judge Colbert stated that there are no common area measures currently allowed under ESA, as ESA measures are for the benefit of low income residents and not for common areas, which are owned and controlled by landlords who are not necessarily low income. Judge Colbert added that this issue is being discussed in the two CARE/ESA proceedings.

Large IOU Workshop – A.14-11-007, et al

Southern California Edison (SCE)

Presenters: John Fasana, Regulatory Project Manager; Tory Weber, Principal Manager, Residential Demand Side Management Program Operation and Jessica Lim, Principal Manager, Offer Management & Marketing

Marketing, Education, and Outreach (ME&O)

Ms. Lim described SCE ads in ethnic media outlets (print, digital, radio, television). Ms. Lim stated that translations also consider how messages can best resonate with each specific community. She also discussed SCE's relationships with CBOs, faith-based organizations, tribal groups, capitation agencies, and government partners, as well as grassroots outreach efforts. She also listed direct to customer tactics such as mail and bill inserts. SCE discussed its efforts to test and optimize marketing tactics to improve response rates. SCE described plans to develop multifamily-specific collateral, as well as SCE-branded collateral for its contractors. Ms. Lim also described coordination with the other IOUs and with the Lifeline program. Finally, Ms. Lim presented on SCE's Summer Readiness campaign and associated water-saving messaging, as well as on SCE's safety campaign.

Chairman Castaneda asked about expenditures, noting that they are well below budget and that ME&O is essential to increase participation. According to SCE's presentation, there is \$3,863,803 in unspent local and statewide marketing funds from the 2009-2014 program years, which corresponds to 65% of authorized funds in this category. Ms. Lim described the various ME&O approaches that SCE undertakes, and referred Chairman Castaneda to the next presenter, Tory Weber.

CARE and ESA Program Updates

Mr. Weber presented on SCE's expenditures and unspent funds. He reported that the total unspent funds from 2009 – 2014 was \$88,218,830, and stated that some of this can be attributed to: nearly doubling budget in 2009, requiring a workforce expansion that took time to implement; meeting the homes treated goal in 2011 while spending \$13 million less than the authorized budget; a 2012 month-to-month bridge period that created program uncertainty; and in 2013 and 2014, customer unwillingness and the modified three measure minimum rule. He also reported that the projected unspent funds through 2015 is \$112,655,460.

Mr. Weber referred to SCE's advice letter from 2014, requesting to return unspent funds to ratepayers, and noted that SCE plans to supplement that advice letter to remove that request, because the issue is being addressed in the instant proceeding.

Q&A

Commissioner Sandoval noted that the issue of unspent funds is one that the Commission is looking at closely. She asked what factors are currently inhibiting spending and what SCE's approach is to spend funds. The Commissioner also noted the Commission's focus on high energy use low income consumers. Mr. Weber stated that removal of the three measure minimum and go-back rules, inclusion of water-energy measures, and more easy-to-install measures would help. On the multifamily side, he stated that more integration with programs for common area measures would also help. Mr. Weber noted that adding mid-cycle measures might also help. He stated that going forward; SCE requests Commission authorization to return unspent funds to ratepayers on an annual basis.

Board Member Toledo noted that the amount of unspent funds in the large IOU ESA programs is significant, and thanked Commissioner Sandoval for bringing this issue as an agenda item for LIOB through this Workshop. Board Member Toledo stated that the unspent funds could be used to help low income customers who need assistance. Mr. Weber responded that awareness is not as big a barrier as trust, and setting up appointments. SCE stated that it has considered the LINA recommendations and has proposed online appointment-making systems, as well as education on how ESA can help meet customer needs. Board Member Toledo stated that several tribal organizations have applied to be ESA contractors, but have not been accepted; she recommended contracting with these companies, which are in the communities that have high need.

Chairman Castaneda asked what other barriers exist to implementation of ESA and spending authorized funds. Mr. Weber replied that SCE is working more with CBOs to help overcome the trust barrier that may deter eligible customers from participating in ESA. It is also finding the appointment-setting process to be a big barrier. Mr. Weber said that the requirement for participants to provide detailed information is also a barrier, though he is not sure how significant of a barrier it is. However, he stated that SCE is trying to simplify the process by clarifying why this information is needed, by allowing participants to upload the required documentation online, and by allowing customers to schedule their home visit appointments online.

Chairman Castaneda noted that inclusion of air conditioning in climate zone 13 might increase participation, and that rural customers have significant energy burden and concern about their utility bills.

ALJ Colbert asked for clarification as to whether CARE and ESA customers pay for the discount and measures they receive, or pay the CARE/ESA surcharge on their bill. SCE clarified that they do not. ALJ Colbert clarified that if unspent funds were returned to ratepayers, that this would be ratepayer money being returned to those same ratepayers; Mr. Weber confirmed that this is correct. Mr. Weber further stated that SCE has requested Commission authorization to return its unspent funds to ratepayers, and contends that its proposed activities in its application can be covered by the budget proposed in that application.

Mr. Weber stated that removal of the go-back rule would not prompt SCE to specifically target already-treated homes, but rather that it would treat those homes if it comes upon them in the course of its

standard ESA work. Judge Colbert asked whether it is SCE's view that the go-back should occur because of new technology making it worthwhile to return. SCE stated that it is more the case that SCE would like to be able to treat homes once a contractor is inside the home, to the extent that there are measures that could feasibly be installed, even if it turns out that the home was already treated.

Board Member Gross asked about coordination in multifamily properties between the common area and ESA programs, and recommended targeting affordable housing developers. Mr. Weber confirmed that it has done some of this outreach and intends to do more.

Board Member Delgado-Olson asked whether there is a cost to returning unspent funds to ratepayers. SCE stated that this activity does not have any additional cost beyond regular ratemaking activities. Board Member Delgado-Olson asked for further clarification on how funding would be returned.

ALJ Colbert clarified that SCE's request relates to previous program cycles, not this program cycle. Judge Colbert asked whether the budget is set by assuming all eligible homes receive all measures, and that because this assumption is designed to avoid running out of funds, it is likely that there will always be unspent funds. SCE clarified that it does generally have unspent funds, and that it proposed in its application to return funds on an annual basis, going forward, rather than at the end of each program cycle. Judge Colbert noted that CPUC staff reviews all requests to return unspent funds to ratepayers.

Southern California Gas (SoCalGas)

Presenters: Ted Humphrey, Senior Outreach Advisor and Mark Aguirre, Customer Programs Manager, Energy Savings Assistance Program

ME&O

SoCalGas presented on its ME&O activities, including online, print, and ethnic media, focusing on its leveraging activities with CBOs. SoCalGas also described its in-language CARE/ESA outreach and event participation, and its CHANGES & Lifeline coordination. SoCalGas also presented on its contractor outreach, and noted that it has requested in its application that there be higher payments to canvassers in outlying areas, where outreach is more expensive.

Q&A

Chairman Castaneda noted that electricity bill savings are generally greater than natural gas bill savings, and suggested a greater level of coordination/leveraging with SCE. In response to questioning from Commissioner Sandoval, SoCalGas stated that it does not have significant unspent funds in the area of ME&O.

CARE and ESA Program Updates

At Commissioner Sandoval's request, SoCalGas focused on the issue of unspent funds. SoCalGas presented statistics on expenditures and unspent funds. Mr. Aguirre reported that the total amount authorized for 2015 was \$131.4 million and that \$50.6 million of that is projected to be unspent in 2015; the total projected unspent funds through 2015 (including prior program cycles) is \$163.9 million. Mr. Aguirre reported that the total unspent funds through 2014 was \$113.3 million and that the major contributor to this was that fewer homes than expected were treated; he stated that SoCalGas had

some challenges in meeting its 136,000 homes treated goal. In its current application, SoCalGas stated that it proposes to treat 80,000 homes on average per year, to meet its 2020 homes treated goal. SoCalGas also noted that in its application, it suggested returning unspent funds to ratepayers; these funds were originally collected as part of the Public Purpose Programs (PPP) Surcharge.

SoCalGas stated that it explored the water-energy calculator, and did not find additional water-saving measures to be cost-effective so as to recommend including them in the ESA program. SoCalGas then described its existing water-saving measures and newly proposed thermostatic tub spout measure, as well as its coordination efforts with water agencies, including the Los Angeles Department of Water and Power (LA DWP). SoCalGas stated that it does not have any hard caps on water measures. Soft caps do exist for accounting purposes, but SoCalGas noted that contractors can ask to override them on an as-needed basis (for example, if more than seven faucet aerators are needed for a single household). SoCalGas also highlighted its leveraging effort on multifamily housing with LADWP.

Commissioner Sandoval asked how SoCalGas intends to ensure that budget is well-calibrated to customer needs, going forward. SoCalGas stated that it plans to offer more measures per home, which will increase spending per home.

San Diego Gas and Electric (SDG&E)

Presenters: Claire Luffborough, Senior Marketing Advisor for the CARE and ESA Programs and Mayda Bandy, Residential Customer Programs Manager

ME&O

SDG&E described its ME&O budget and spending, as well as providing an overview of its ME&O strategies: general awareness (such as mass media), partner education and outreach (such as CARE capitation, contractor outreach to property managers), community engagement (such as presentations and events, including multicultural and rural outreach), and direct marketing (such as mail and canvassing). SDG&E then described additional new tactics proposed in each of these areas in its application. SDG&E also shared “heat maps” detailing regional penetration rates and remaining eligible customers.

CARE and ESA Program Updates

SDG&E presented on its CARE and ESA enrollment, penetration, expenditures, and unspent funds. Ms. Bandy reported that SDG&E’s projected expenses for 2015 are \$26,904,989, and the amount authorized through the bridge year funding is \$23,772,250. SDG&E therefore anticipates a \$3,132,732 additional need in 2015, and has requested in its application to use \$3.1 million in unspent funds to meet that need: \$2.6 million for gas measures and \$0.5 million for electric measures. SDG&E has \$20,078,232 in unspent funds from the 2009-2014 program years.

The majority of SDG&E’s 2009-2014 unspent funds are in the measures category. SDG&E requested the ability to transfer unspent funds between electric and gas measures. SDG&E would like to offset revenue requirements with some of the unspent funds, and to add additional measures with the remainder. SDG&E stated that it also proposes to work with landlords to allow them to state that they believe their tenants to be eligible, in order to increase penetration.

Q&A

Board Member Lopez asked for more clarification on what activities are included under the unspent fund categories. SDG&E provided further description of what ME&O activities are included under that line item and offered to provide more information in the future.

Pacific Gas & Electric (PG&E)

Presenters: Ayaka Emoto, Senior Marketing Strategist and Allen Fernandez Smith, Manager of Low Income Programs & Strategies

ME&O

PG&E described its activities to address customer enrollment barriers, as well as its outreach approaches (such as email, bill inserts, direct mail, telemarketing, and digital media). It also highlighted its targeting tests to determine effectiveness of these outreach approaches with seniors and non-responders, two hard-to-reach groups. PG&E also described its efforts to better support and coordinate with ESA contractors.

CARE and ESA Program Updates

At Commissioner Sandoval's request, PG&E focused its presentation on unspent funds. PG&E's presentation noted that the total amount authorized for 2015 was \$160,133,351 and that \$12,833,351 in unspent funds is projected in 2015; the total projected unspent funds through 2015 (including prior program cycles) is \$108,593,108. The total unspent funds through 2014 were \$95,759,757. Through June 2015, PG&E noted that it has treated 51,209 homes, with a goal of treating 119,940 homes by the end of the year.

PG&E stated that 11% of 2009-2014 funds are unspent. PG&E further stated that it is sensitive to the need not to overspend its budget, so it anticipates there will always be some unspent funds. PG&E noted that it has reduced some of its own marketing spending as ESA contractors increase their marketing and reach homes treated goals. In the future, however, it anticipates that marketing spending may increase overall, as the number of remaining eligible customers is lower, and they are harder to reach.

Lastly, Mr. Fernandez Smith explained that a big portion of the unspent funds was due to the shifting of PG&E's Natural Gas Appliance Testing (NGAT) funds into the General Rate Case (GRC) and out of the ESA budget. PG&E filed an amendment to its application outlining this shift.

Q&A

Board Member Delgado-Olson asked whether the quantity of unspent funds has been consistent across years. PG&E stated that there is variation across years, and clarified that about \$41 million was unspent in 2009-2011. PG&E further stated that it proposed to return unspent funds to ratepayers, but it also noted that it would also consider reallocating some or all of these funds to other areas: (1) measures (remove measure caps), (2) water-energy and drought measures, and (3) pilots and general administration. Commissioner Sandoval also asked about coordination with water utilities, and requested that PG&E provide additional information to the extent possible, in its comments on this workshop report.

Board Member Toledo asked for further information on the balancing accounts, and ALJ Colbert provided clarification on standard Commission accounting conventions and procedures for balancing accounts. Board Member Toledo suggested that the funds could perhaps go towards a project to serve low income customers.

Public Comment

Commissioner Sandoval provided clarification that the workshop will be documented in this workshop report, and that there will then be an opportunity to comment on the report and issue reply comments. She further stated that these should be comments about the report itself, and not advocacy comments. ALJ Colbert concurred with the Commissioner's statement.

Anna Solorio, Community Housing Opportunities Corp and Energy Efficiency Council (party to both proceedings)

Ms. Solorio represents a non-profit that builds and manages affordable housing. She provided information on the nature of her organization, and its community involvement and mission. She also stated support for IOU proposals to remove caps and increase measures, and concern about proposals to return ESA funds to ratepayers, arguing there is still unmet need. Ms. Solorio also noted that marketing costs are increasing as the number of remaining eligible customers decreases.

Attachments

Southwest Gas CARE & ESA Programs

Low Income Oversight Board Meeting
August 19, 2015



Southwest Gas Contact

CARE & ESA Programs

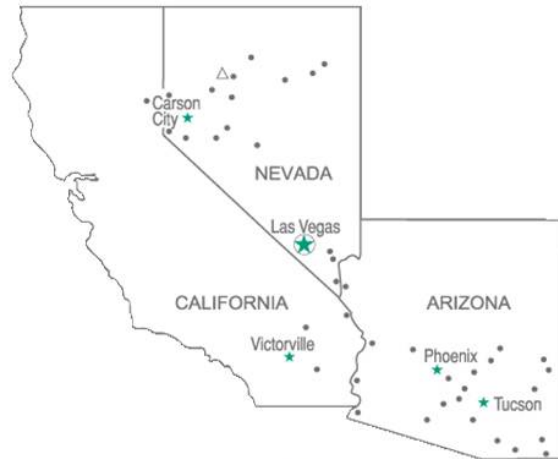
Celine Apo, Analyst II, 702.876.7149

Celine.Apo@swgas.com



Southwest Gas Overview

- Over **1.9 million** customers
- About **190,000** customers in **CA**
 - 25% in NCA
 - Lake Tahoe & Truckee
 - 75% in SCA
 - Needles
 - Barstow, Victorville & Big Bear



Successes and Areas for Improvement

- Successes
 - CARE – maintained > 90% penetration
 - ESA – doubled penetration in 2014 compared to 2012 & 2013
- Areas for Improvement
 - Increase leveraging efforts with other utilities
 - Increase collaboration with Lifeline and LIHEAP



Drought Emergency

■ Water-Energy nexus/drought information



Drought Emergency

Energy Savings

Assistance ProgramSM

■ Water-saving measures

- Faucet aerators
- Low-flow showerheads
- Thermostatic shut-off valves (TSV)
- High-efficiency clothes washers



Multi-Family Programs & Measures

- ESA

- All multi-family tenants are eligible (with property owner approval, if renting)
- Encourage use of the “80-20 measures rule”
- Promote Commercial Rebates program for common area improvements



Unspent Funds

- ESA

- \$410,526 2014 unspent (carryover) funds
- \$3,172,693 2015 bridge funding budget
- **\$3,583,219** **2015 authorized budget with carryover**
- Anticipate spending entire 2015 authorized budget with carryover to treat as many homes as possible



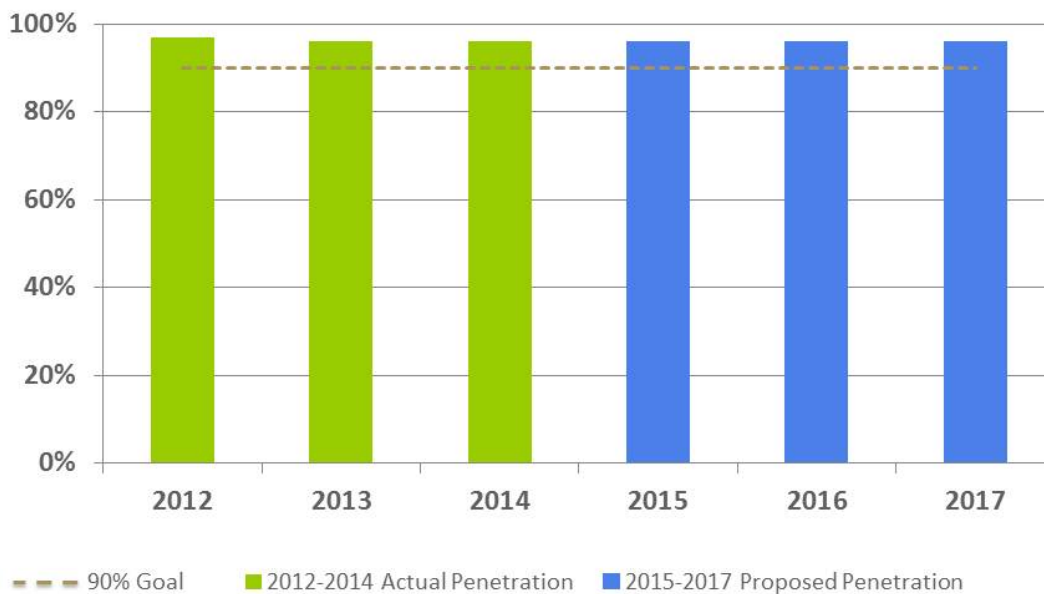
Southwest Gas CARE Program

■ CARE Enrollment, Penetration and Expenditures

Year	Customers Enrolled	Estimated Eligible Customers	Penetration Rate	Expenditures	% of Authorized	Discounts
2015 – June 30	54,721	58,256	94%	\$53,598	24%	\$4,266,686
2014 Year-End	55,920	57,814	97%	\$197,309	87%	\$6,336,492
2013 Year-End	55,161	57,177	96%	\$158,949	70%	\$6,910,690



CARE Program Penetration



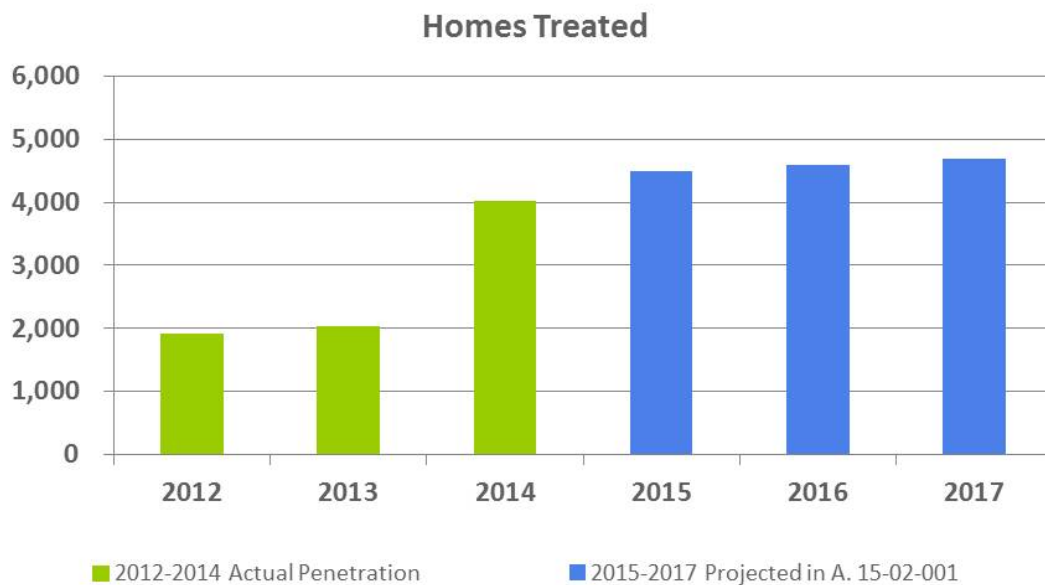
Southwest Gas ESA Program

■ Number of Homes Treated and Program Expenditures

Year	Homes Treated	Goal	% of Goal	Expenditures	% of Authorized
2015 – June 30	1,119	2,133*	25%	\$1,623,644	51%
2014 Year-End	4,024	2,559	157%	\$4,698,030	148%
2013 Year-End	2,038	2,559	80%	\$2,305,280	73%
Notes:	*Adjusted goal based on 2015 authorized bridge funding				

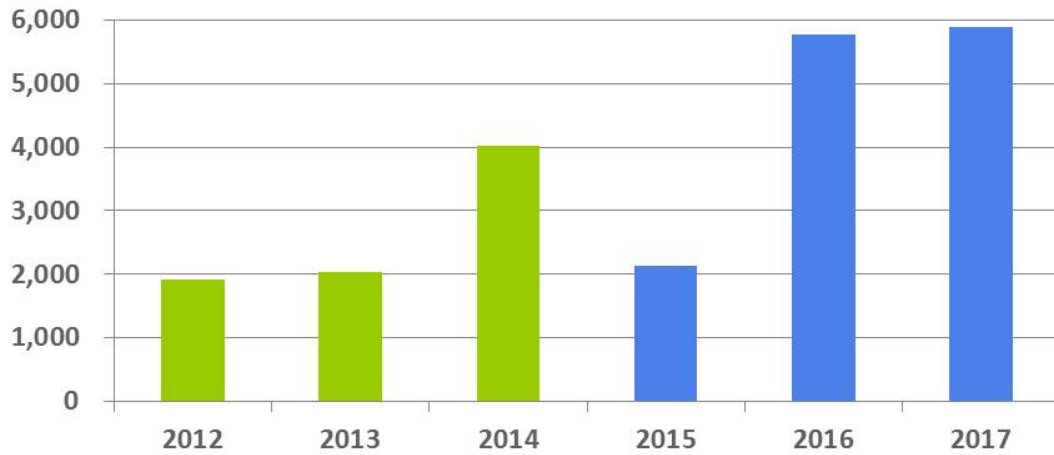


ESA Program



ESA Program

Homes Treated



■ 2012-2014 Actual Penetration ■ 2015-2017 Projections based on Dec. 2015 Decision

CARE & ESA Programs: 2014 Marketing & Outreach

CARE		ESA	
Budget	Actual Expenditures	Budget	Actual Expenditures
\$100,000	\$131,430	\$34,900	\$62,601

■ Efforts

- Capitation
- Data Shares
- Bill Inserts
- Direct Mail
- Events
- Print Ads
 - 21% on ethnic owned



CARE & ESA Programs: 2015 Marketing & Outreach

CARE		ESA	
Budget	Actual Expenditures	Budget	Actual Expenditures (thru 6/30)
\$100,000	\$28,112	\$34,900	\$6,768

■ Efforts

- Capitation
- Data Shares
- Bill Inserts
- Bus Shelters – **NEW**
- Direct Mail
- Events
- Print Ads
- 37% on ethnic owned



CARE & ESA Programs: Outreach

Print Ad

Here's How to Lower Your Natural Gas Bill

Rent or own, Southwest Gas makes it easier for you to save. The **Energy Savings Assistance Program (ESA)** offers home improvements at no cost to you. Whether it's replacing worn weather-stripping or installing better insulation, your home will be evaluated to maximize your savings!

Make your home more comfortable and worry less so you can spend more time on what's important to you.

Our **California Alternate Rates for Energy (CARE)** program can also help you save an additional 20% off your monthly bill.

How to Qualify*

Number of Persons Living in My Home	Total Combined Annual Income From All Sources
1-2	\$31,460
3	\$39,580
4	\$47,700
5	\$55,820
6	\$63,940
7	\$72,060
8	\$80,180

For each additional person, add \$8,120

*CARE and ESA eligibility is determined by the number of persons living in the household and total household annual income. Income levels are effective through May 31, 2015.

Find out more for yourself or someone you know:

Energy Savings Assistance Program Richard Heath & Associates 1-866-812-5766	CARE Program Southwest Gas 1-877-860-6020
--	--

Energy Savings Assistance Program

Bill Insert

California Alternate Rates for Energy (CARE) Program

The **CARE Program** provides a 20 percent discount on monthly gas bills to income-qualified customers at their primary residence.

Program eligibility is determined by the number of persons in the household and the total household gross annual income.

Number of Persons Living in My Home (Número de personas que viven en el hogar)	Annual Income (Ingreso Anual)
1-2	\$31,460
3	\$39,580
4	\$47,700
5	\$55,820
6	\$63,940
7	\$72,060
8	\$80,180

For each additional person add: \$8,120

Energy Savings Assistance (ESA) Program

The **ESA Program** can help our income-qualified customers reduce their overall energy use and increase the energy efficiency of their home.

Southwest Gas is proud to work with the following contractors for the ESA Program:

- Community Action Partnership of San Bernardino County
- Project GO Inc.
- Proteus Inc.
- Quality Conservation Services

For more information, please call Southwest Gas at 1-877-860-6020 or visit www.swgasliving.com/caassist

SOUTHWEST GAS
smarter > greener > better

Events





Bear Valley Electric Service CARE & ESA Programs

**Low Income Oversight Board Meeting
August 19, 2015**

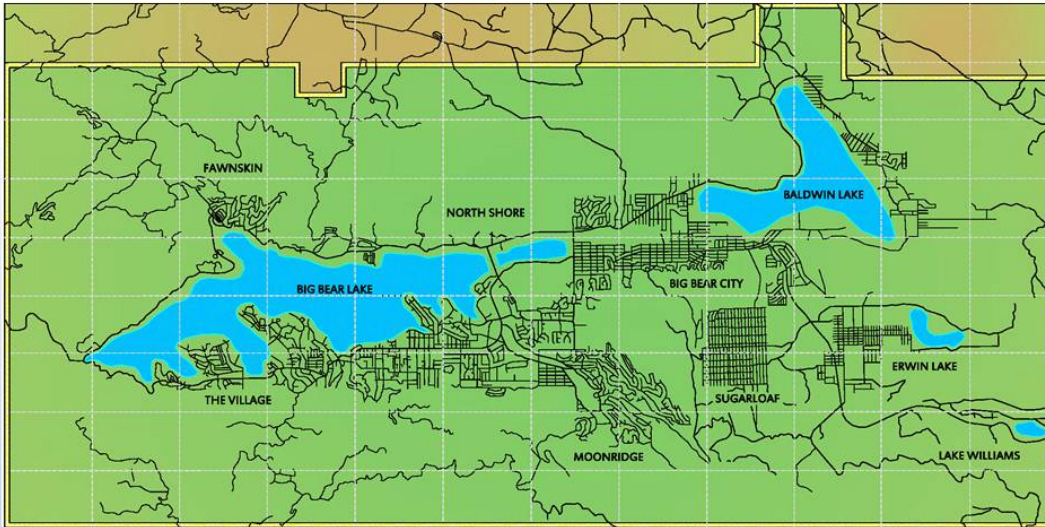


Company Overview



- Resort community located at approximately 7,000 feet in the San Bernardino Mountains
- 78 square mile service territory surrounding Big Bear Lake
 - Includes 8 communities with Big Bear Lake and Big Bear City being the 2 largest
- Provides service to 23,752 customers:
 - 22,073 residential
 - 1,679 commercial, industrial, and public-authority
- 5,800 or 26% full time residential customers
 - Remainder seasonal customers with rental properties and large homes
- Only full time residents may apply for the ESA and CARE programs
 - BVES estimates 2,986 eligible of 5,800 full time

Service Territory



CARE Program



- Successes
 - Maintained > 90% penetration rate from 2012-14
 - Implemented CARE High Usage
- Areas for Improvement
 - Increase current 2015 penetration rate
 - Numbers dropped with CARE High Usage
 - Evaluate reasons for non-response and removal
 - Increase leveraging efforts and collaboration with Lifeline

ESA Program

- Successes
 - Leveraging with Southwest Gas
 - Increased penetration rates
 - Customer participation and positive feedback about contractor
- Areas for Improvement
 - Increase collaboration and leveraging efforts with CBOs
 - Establish more prominent program identity

Drought Emergency

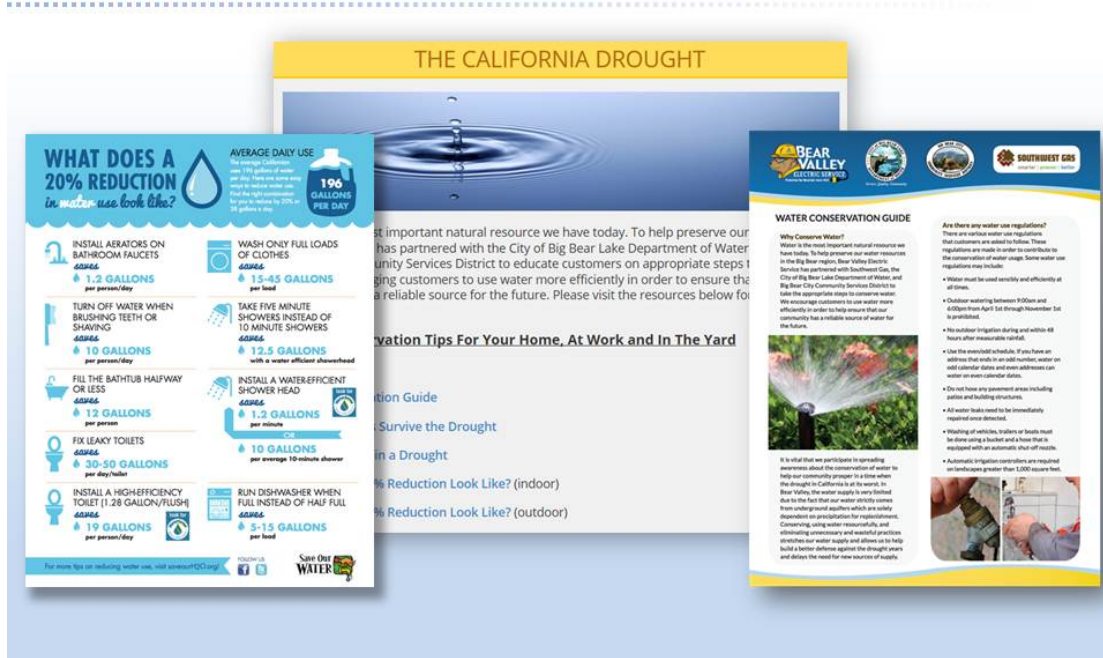
- ESA Water Saving Measures
 - Low-flow showerheads
 - Faucet aerators
 - Leak detection tablets
 - Water heater blankets
 - Pipe wraps
 - Thermostatic shower valves
 - High-efficiency clothes washers
- Coordination with local water agencies



Drought Emergency



**Bear Valley
Electric Service**
A Division of Golden State Water Company



Multi-Family



**Bear Valley
Electric Service**
A Division of Golden State Water Company

- CARE
 - Sub-metered tenants eligible
 - Billed by apartment complex owner
- ESA
 - Multi-family tenants eligible
 - Outreach rentals agencies and property managers to inform of program
 - Leverage Business Lighting and Rebate Programs for common areas

ESA Unspent Funds



\$638,744	2014 Carryover Funds
<u>\$229,625</u>	2015-2017 Proposed Budget
\$868,369	2015 Budget with Carryover

- Planning to utilize carry over funds to deploy catch up plan
- Increasing goal of 210 homes/year to about 400

CARE Program



- CARE Enrollment, Penetration and Expenditures

Year	Customers Enrolled	Estimated Eligible Customers	Penetration Rate	Expenditures	% of Authorized	Discounts
2015 – June 30	2,585*	2,986	87%	\$3,530	41%	\$168,346
2014 Year-End	2,860	2,986	96%	\$8,185	96%	\$236,694
2013 Year-End	2,931	2,986	98%	\$2,578	30%	\$228,671

Notes: *CARE penetration rate dropped in 2015 due to CARE High Usage Rule and seasonal residency

ESA Program



- ESA Number of Homes Treated and Program Expenditures

Year	Homes Treated	Goal	% of Goal	Expenditures	% of Authorized
2015 – June 30	99	210*	47%	\$85,608	37%
2014 Year End	103	210	49%	\$149,193	64%
2013 Year End	126	210	60%	\$133,313	58%

Notes: *Planning to deploy catch-up plan and increase goal to around 400

Outreach Efforts



- Mailer with updated guidelines
 - Inclusion of contractor logo
- Door to door canvassing
- Print ads, bus panel ads and radio ads
- Coordination and leveraging with local agencies
- Events
- Data sharing with Southwest Gas
- Addition of online interest forms

Outreach Efforts



Bear Valley Electric Service
ESA/CARE Program
Bear Valley Electric Service is Here to Help!

Income qualified customers are eligible to receive a **20% Discount** on their electric bill through the California Alternate Rates for Energy (CARE) program.

Qualified customers may also be eligible to receive **FREE home energy improvements** through the Energy Savings Assistance Program including:

-  Refrigerator Replacement
-  Home Weatherization Upgrades
-  Energy Efficient Lighting

Visit BVES' website at www.bves.com or call us at **800-808-BVES** and find out if you're eligible to start saving big money on your electric bill!



Bear Valley Electric Service
Dedicating Our Energy To You



California Energy Assistance Programs
Bear Valley Electric Service is here to help!

Take advantage of our Energy Savings Assistance Program
Under Bear Valley Electric Service's ESA Program, income-qualified customers may be eligible to receive free energy saving home improvements, including:

- Energy efficient refrigeration
- Smart meters
- Energy saving light bulbs
- Insulation
- Weather stripping and caulking

ESA and CARE Program Income Requirements*
Effective June 1, 2015 through May 31, 2016

Number of Persons Living in My Home	Total Combined Annual Income from ALL Sources
1-2	\$17,000
3	\$18,100
4	\$19,200
5	\$20,300
6	\$21,400
7	\$22,500
8	\$23,600

For each additional person add \$1,100

*Eligibility is determined by the number of persons living in household and total household annual income.

California Alternate Rates for Energy (CARE)
Through the CARE Program offered at Bear Valley Electric Service, customers may be eligible to receive a 20% discount on their electric bill. To qualify, you must meet the following requirements:

- The bill is in your name
- You are not covered as a dependent on another person's tax return
- Your total household income does not exceed the amount listed in the amount listed in the Program Income Requirements chart.
- Note: Total household income means the combined amount of money received each year — from all sources, both taxable and nontaxable, before deductions — by everyone who lives in your home.

If you or your spouse are called to active military service, your family is eligible to use our Military Family Relief Program

- 10% tax credit exemption
- Extended payment terms if military service reduces family income

Medical Baseline Program
If someone in your household has a qualified medical condition that is verified by a doctor, none of your electricity bill will be charged at the lowest rate.

"I was amazed at the work they did in my home. This CARE program provided more than I expected and the customer service was excellent throughout the process!" — Pat

For more information or to sign up for any of the California Energy Assistance Programs, call us at **1-800-808-BVES** or visit us online at www.bves.com

For more information on CARE and ESA programs offered by Southwest Gas:
ESA - National Health and Carecounselor: 866-822-5766
CARE - Southwest Gas: 877-866-8679

Questions?

Please contact:
Danielle De Clercq
Public Purpose Program Coordinator
(909) 866-4678 ext. 187
Danielle.DeClercq@bves.com



Liberty Utilities®

CPUC LIOB Workshop ESA – CARE Programs

August 19, 2015

Presented by Lori Williams

Service Territory Overview



- Purchased NV Energy's California service territory effective Jan. 1, 2011
- Approx. 1,476 square miles, 7 counties ;49,000 customers; **40% (19,368) Primary Residential & 50% Second Homes; 10% Commercial**
- Two business office locations: South Lake Tahoe and Tahoe Vista
- Pay \$2.8 million in annual property taxes and franchise fees
- 90 employees evenly split between South and North Lake Tahoe
- Regulated by the California Public Utilities Commission (CPUC)

Liberty Utilities CARE Program

CARE Enrollment, Penetration and Expenditures

Year	Customers Enrolled	Estimated Eligible Customers	Penetration Rate	Expenditures	% of Authorized	Discounts
2015 – June 30	3740	6267	59.7	39,943	181.6	353,348
2014 Year-End	3334	6267	53.2	53,260	242.1	633,559
2013 Year-End	3413	5200	65.6	29,156	132.5	688,673
Notes: Updated Eligible w/Census in 2014; Admin & Outreach not charged to CARE Program prior to Mid2013						

3

Liberty Utilities ESA Program

Number of Homes Treated and Program Expenditures

Year	Homes Treated	Goal	% of Goal	Expenditures	% of Authorized
2015 – June 30	41	90	45.6	\$51,275	18.6
2014 Year End	168	220	76.4	\$146,704	73.1
2013 Year End	248	220	112.7	\$251,031	125.0
Notes: Completed 768 units in 2012-2014 cycle; Spent \$631,253 of \$602,460 + 91,502 carryover					

4

Liberty Utilities ESA Program

Projected Year-End Expenditures and Unspent Funds

Projected Expenses 2015	Amount Authorized 2015	Projected Unspent Funds in 2015	Total Unspent Funds Through 2014	Projected Unspent Funds Through 2015
215,000	200,820	-14,180	\$62,708	48,528

2014	2014 Total Unspent	Unspent as Percent Of Authorized	2014 Explanation
Measures	\$62,708	31.2%	Contractor Spend Tracking due to Invoicing Delays
Marketing & Statewide Marketing			
Regulatory Compliance			
General Administration			
CPUC Energy Division			
Other			
Total			

Notes:

5

ESA & CARE Overview-Successes & Improvement Areas

➤ CARE

- Updated CARE Eligible Data using census by community resulting in an increase CARE Eligible from 3700 to 6267; Reduces Penetration to 53%
- Requested 44.5% Additional CARE Budget 2015-2017 for Increased Participants & Targeted Outreach to pursue penetration target of 90% Eligible (12.6 x Outreach \$ & 5.2 x Program Costs)

➤ ESA

- 2012-2014 Cycle - Treated 768units of Targeted 660units
- 2012-2014 Cycle – Spent \$631,252 of Available \$693,962
- 2012-2014 Cycle – Unspent Balance \$62,708 (Invoicing Issues)
- Requested Increased 2 Fold Increase in ESA Budget in 2015-2017 to Treat more Units, offer 6 Additional Measures & Pursue Goal thru Targeted Outreach; Requests 5 fold increase for Outreach Budget

6

ESA Overview-Drought & Multi-Family

➤ Drought Emergency:

- Currently Offer Showerheads, Aerators, WH Pipe wrap, WH repairs
- Requesting Budget for New Measures including Thermostatic Shower Valves, HE Clothes Washers (VALVES Installed NOW)
- Additional Utility Energy Savings from pumping, treating, wastewater treatment; ALSO, pumping savings to remove waste water out of Lake Tahoe Basin- Provides energy/water nexus
- Communities served by MANY small PUD/Water Utilities makes drought coordination challenging and costly.

➤ Multi-Family

- Providing Outreach directly to Landlords & Multi-Family Complexes by Installation Contractor Project Go.
- Allowing Landlords to provide single Property Owner Agreement for Multiple Units/Locations.
- Installing Non-Invasive Measures without POA.
- Requested Increased ESA Budget in 2015-2017 to Treat more Units, Offer 6 Additional Measures & Pursue Penetration thru Targeted Outreach.
- No Common Areas Measures have been included in filing.

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ESA Overview - Unspent \$

➤ Unspent Funds:

- \$62,708 Unspent from 2012-2014 Cycle includes (\$200,820 annual budget +\$91,502 Prior Cycle Unspent)
- \$62,708 included within 2015-2017 Filing \$ Request;
- ESA \$ Under Collected in 2014 due to Lower than Forecast Revenues
- Unspent Funds not to be Spent in 2015 without Application Approval based on interpretation of the Carryover Provisions by Liberty Legal Counsel;
- Recommend use for Next Cycle Installs OR Possibly for Water/Energy Saving Drought Measures (Low Flow Toilets/Valve Replacements, Leak Detection Tablets, Enhanced Installs of HE Clothes Washers)

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ESA & CARE Overview-Current Penetration Rates as of 6/30/15



➤ CARE

- 3740 CARE Enrolled of the Estimated Eligible 6267 = 59.7%
- \$ 393,291 of Total Budget \$635,880 = 61.9 %
- \$ 39,943 of Outreach/Admin Budget \$22,000 = 181.6 %
- \$ 353,348 of Discount Budget \$613,880 = 57.6 %

➤ ESA

- 41 Units Treated of the Target 220 = 18.6%
- \$ 51,276 of Total Budget \$200,820 = 25.5 %
- \$ 2471 of Outreach Budget \$13,224 = 18.7 %
- \$ 27,618 of Admin. Budget \$33,060 = 83.5 % (\$13,032 Regulatory)
- \$ 21,187 of Program Budget \$154,536 = 13.7%

9

ESA Increased Targeted Outreach:



- Increased Targeted Outreach with 5-Fold Budget Increase from \$ 13,244/yr to Average of \$63,275/yr
- **Continue Outreach:**
 - Inserts: newsletters/ Program specific
 - Print Ads in Local Papers & Publications
 - Coordination with Community Service Organizations (SLT)
 - Community Events & Local Businesses
 - Neighborhood Canvassing/door-hangars/ Mailers by Install Contractor- Best Result
- **Outbound Calls to Customers & CARE Participants**
- **Add Targeted Outreach to:**
 - Rural Communities – 7 counties; multiple communities
 - Agencies, Marines, Tribal, clubs, events
 - Community Services Organizations, Senior Centers, Churches
 - Under-participating Groups- Seniors/ Hispanic
 - Customize Outreach for Individual Communities Culture, Organizations, Demographics
 - Map Participation & Target areas
 - On-line Display Ads

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CARE Outreach/Enrollment

Current:

- Bill Inserts -Self Certification/Post Paid Application Mailed Annually
- Bill Inserts Newsletter, Print Ads
- HEAP program Payment customers placed on CARE
- Data Shares with Southwest Gas
- Capitations by ESA Install Contractor
- CS Scripts for Payment Challenged

Targeted Outreach (Requires additional \$\$ requested in Filing):

- 7 Counties Services, City/Town Services – Individually Targeted Outreach to rural communities
- Coordinate w/ Mobile Home Parks/ Multi Tenant Master Metered
- Food Pantries, Aid Centers, Health Centers, Unemployment/Recruiting offices,
- Senior Centers, Hispanic Community Centers, Marine Housing, Tribal Communities
- Religious Organizations/Churches
- Canvassing Neighborhoods/Door-hangars
- Community Events- health fairs, pot-lucks,
- On-line Display Ads

11

Thank you.

Questions?

Contact:

Lori Williams-ESA Program Manager:

(775)336-1300ext 107

lwilliams@trisage.com

Dennis Lipnisky – CARE Program Manager

530-546-1789

Dennis.Lipnisky@libertyutilities.com

12

PacifiCorp

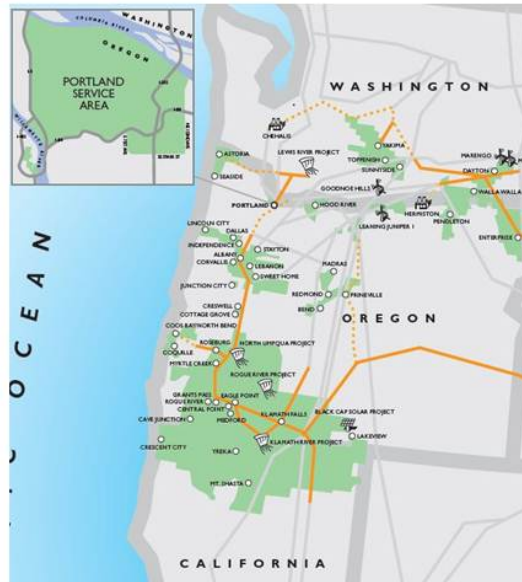
LIOB Workshop

August 19, 2015



Pacific Power Overview

- Pacific Power serves 794,699 customers in California, Oregon, and Washington.
- California's 36,000 residential customers cover 12,000 miles.
- Thirty-nine percent of our customers qualify for low income programs (200% of FPG).
- CARE participation is 83% of eligible customers.
- ESA weatherization services provided by Community Based Organizations (CBOs) in Siskiyou, Modoc, and Del Norte counties.



Pacific Power CARE Program

CARE Enrollment, Penetration and Expenditures

Year	Customers Enrolled	Estimated Eligible Customers	Penetration Rate	Expenditures	% of Authorized	Discounts
2015 – June 30	11,247	13,887	81%	\$57,427	52%	\$1,927,199
2014 Year-End	11,552	13,880	83%	\$78,906	72%	\$3,434,611
2013 Year-End	10,975	13,861	79%	\$70,676	64%	\$3,076,631

Pacific Power ESA Program

Number of Homes Treated and Program Expenditures

Year	Homes Treated	Goal	% of Goal	Expenditures	% of Authorized
2015 – June 30	77	150	51%	\$176,836	19%
2014 Year End	122	150	81%	\$506,506	54%
2013 Year End	188	150	125%	\$757,500	81%

CARE Outreach

Successes

- Increased penetration rate by 10% from 2012 to 2014.
 - In addition to radio ads, grocery bags, and bill inserts, a direct mail application was sent to all residential customers.
 - Ongoing communication with the Yurok Tribal Authority, Elk Valley Rancheria, and Smith River Rancheria Housing Authority.
 - LIHEAP recipients not on CARE were automatically enrolled and recertified on a quarterly basis.
 - Distributed program information to senior centers, social services, and food banks.
 - Online applications and promotion by our call centers when a customer calls to open an account.

Budget Cycle 2015-2017

- Increase penetration to 90% by 2017.
 - Continue annual direct mail program applications to all residential customers.
 - Proposed Needs Assessment analysis/study to update and verify the number of low income customers eligible for CARE/ESA in our service territory.
 - Continued work with CBO's to promote the CARE program when customers apply for energy assistance through LIHEAP.

ESA Outreach

Successes

- From 1986 to end of 2015, 4,450 homes have received weatherization services or 86% of eligible households.
- By the end of 2017, the goal is to have 91% of eligible houses weatherized households.
- Annual goal of 150 homes will achieve our 91% penetration rate.

Challenges

- Natural gas service is not available in our service territory, thus no utility partnerships.
- Propane and wood are the alternate heating source for customers.
- An estimated 38% of our customers heat their homes with electric heat.
- Rural territory with approximately 4 customers per mile which results in a long drive time to provide services.

Looking Forward

Budget Cycle 2015-2017

- Continue to partner with CBOs to leverage LIHEAP weatherization funding with ESA budget.
- Continue to market to all residential customers.
- Needs assessment analysis/study to help identify income eligible households and reach more homes.
- Encourage CBOs to identify and serve multifamily units.

Drought Relief

Current ESA program includes:

- Faucet aerators
- Low flow showerheads

Proposed to implement:

- Thermostat controlled showerheads
- High efficiency clothes washers
- Distribution of dye tablets to detect toilet leaks

Pacific Power Contacts

CARE & ESA Program

Melissa Nottingham

Customer & Regulatory Manager

Melissa.Nottingham@PacifiCorp.com

503.813.5136

Southern California Edison Report Low Income Oversight Board (LIOB) Meeting & California Public Utilities Commission Workshop

August 19, 2015

Santa Ana, CA

SOUTHERN CALIFORNIA EDISON

Leading the Way in ElectricitySM

Southern California Edison Marketing Update

August 2015

Marketing Overview

Ethnic advertising and community outreach continue to be key components of SCE's local marketing, education, and outreach efforts.

Through June 2015, SCE has or is purchasing paid advertising in 82 ethnic media outlets, of which 54 (66%) are ethnic-owned.

- Reaching Hispanic, Asian, Native American and African-American markets
- Produced in six languages: English, Spanish, Cambodian (Khmer), Chinese (Mandarin and Cantonese), Korean, and Vietnamese



Marketing and Community Outreach

Ethnic Community Outreach:

- To reach our ethnic and hard-to-reach customers, SCE continues to leverage established relationships with:
 - Community Based Organizations
 - Faith Based Organizations
 - Capitation Agencies (+200 agencies)
 - City and Government Partners
 - Native American Tribal Groups



Grassroots Outreach:

- Community Forums
- Emergency Preparedness Forums
- Ethnic Events
 - Earth Day, Cinco de Mayo and Independence Day Events
 - Local Community Events
 - "Helping Our Customers Succeed" community events in Irwindale, Santa Clarita and Fullerton
- Door-to-door canvassing for Energy Savings Assistance program
 - Majority of customer leads are generated by SCE and provided to contractors who may conduct follow-up outreach

2015 Income-Qualified Marketing

Objective:

- Increase enrollment and participation, among qualified customers, in CARE/FERA and Energy Savings Assistance (ESA) Program.

Tactics:

- Direct to consumer
 - Direct mail
 - E-mail
 - Bill insert messaging
- Mass media
 - Display/Mobile
 - Search Engine Marketing
 - Print
 - Social
- Community Outreach Events

Markets:

- General Market
- African American
- Asian (Chinese, Korean, Vietnamese, Filipino and Cambodian)
- Hispanic
- Native American
- Seniors

Edison's Customer Connection

Spend Less Time Worrying About Your Electric Bill

Use many households in Southern California, you're probably looking for ways to reduce your expenses, and we may be able to help. We want you to be aware of some solutions to help lower your monthly electric bill.

We have two new programs designed to help eligible individuals and families who are struggling with their energy costs. If your household meets certain income qualifications, you may receive a discount of up to 30% on your monthly electric bill through the Energy Savings Assistance (ESA) Program. Additionally, you may qualify for a discount on your monthly electric bill through the Family Electric Rate Assistance (FERA) Program. Both programs are available to all eligible households.

Refer to the current income qualifications below to see if your household qualifies for these services.

Send today at www.scedison.com

Household Income Qualifications*

Number of Persons in Household	Annual Income Limit (2014)	Annual Income Limit (2015)
1	\$15,000	\$15,000
2	\$18,000	\$18,000
3	\$21,000	\$21,000
4	\$24,000	\$24,000
5	\$27,000	\$27,000
6	\$30,000	\$30,000
7	\$33,000	\$33,000
8	\$36,000	\$36,000
9	\$39,000	\$39,000
10	\$42,000	\$42,000

*Current gross (before taxes) household income from all sources.

5

SOUTHERN CALIFORNIA EDISON

2015 Energy Savings Assistance Program Marketing

Target:

- All eligible and willing low income customers.
- In-language, hard-to-reach, and underpenetrated areas continue to be a priority.
- Hard-to-reach defined as those not as easily accessed with traditional marketing and outreach methods and activities - those living in rural communities, immigrants with limited English proficiency, or those who are non-Spanish speaking.

Direct Marketing:

- Encourages customer to contact local ESA Program contractor directly, and assists with outreach efforts.
- English-Spanish direct mail to 280,000 ESA-eligible customers year-to-date Q2.
- English-Spanish email to 37,000 eligible customers year-to-date.

Mass Marketing:

- Display, mobile, social and search engine marketing (SEM) launching in Q4.
- Exploring ethnic print.

Outbound Calling:

- Outbound calling was traditionally a successful complement to direct marketing efforts.
- SCE plans to reinstate outbound calling in Q3 and expects to see renewed lead generation as a result.

Edison's Energy Savings Assistance Program

Lower Energy Bills. Free Appliances. Free Installation.

You may be eligible to participate in the Energy Savings Assistance Program and receive free energy-efficient appliances, such as:

- Refrigerator Replacement
- Free Pump Replacement
- Heat/Cooling
- Lighting Replacement
- Free Water Heater
- Smart Power Strip

Learn More at www.scedison.com

Call today at 1-800-451-4511

Energy Savings Assistance Program

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SOUTHERN CALIFORNIA EDISON

2015 Summer Readiness Campaign

Objectives:

- Increase awareness and adoption of DSM programs, energy management tools, and energy conservation behavior change during summer months.
- Help customers stay safe during the high heat.

Target:

- All residential customers with special attention paid to disabled, ethnic and senior markets.

Translations:

- English, Spanish, Asian (Vietnamese, Korean, Chinese)

Media Channels:

- Radio, Digital, Direct Mail, Email, Social Media, Media Relations

Other Channels:

- Bill Messaging, SCE.com



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SOUTHERN CALIFORNIA EDISON

Leading the Way in Electricity™

2015 Safety Campaign

Objective:

- To continue the Safety message from 2012 - 2014 motivating customers to think about safety around downed and overhead power line safety.

Markets:

- General Market, Hispanic, Asian (Cambodian, Chinese, Korean, Vietnamese)

Media Channels:

- Broadcast TV, Cable TV, Radio, Out of Home, Online/Digital, Print, Media Relations

Other Channels:

- Bill Messaging, SCE.com



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SOUTHERN CALIFORNIA EDISON

Marketing Appendix

Appendix

SCE 2015 Advertising and Media					
African American Consumer Market Asian Consumer Market Hispanic Consumer Market					
	Media Outlets	2015 Safety	2015 Black History Month	2015 Asian History Month	2015 Summer Readiness
African-American Media Outlets					
	Print				
	Black Voice News	X	X		
	Inland Valley News	X	X		
	LA Sentinel	X	X		
	WAVE Newspaper Group	X	X		
	Long Beach Times	X	X		
	Precinct Reporter Group (Precinct Reporter, Long Beach Leader, Tri-County Bulletin)	X	X		
	The Pasadena/SG Valley Journal News	X	X		
	Tri County Sentry	X	X		
	California Crusader	X	X		
	Inglewood Today	X	X		
	Our Weekly Los Angeles	X	X		
	San Bernardino American News	X	X		
	Compton Bulletin	X	X		

Appendix

SCE 2015 Advertising and Media					
African American Consumer Market Asian Consumer Market Hispanic Consumer Market					
	Media Outlets	2015 Safety	2015 Black History Month	2015 Asian History Month	2015 Summer Readiness
Asian Media Outlets					
	Print (Market)				
	Asian Journal (Filipino)	X		X	
	China Press (Chinese)			X	
	Chinese LA Daily News (Chinese)			X	
	California Journal (Filipino)			X	
	Korea Daily (Korean)	X		X	
	Korea Times (Korean)	X		X	
	Nguoi Viet (Vietnamese)	X		X	
	Sing Tao Daily News (Chinese)	X		X	
	US Asian Post (Filipino)	X			
	Viet Bao Daily News (Vietnamese)	X		X	
	World Journal (Chinese)	X		X	
	Weekend Balita (Filipino)	X		X	

Appendix

SCE 2015 Advertising and Media					
African American Consumer Market Asian Consumer Market Hispanic Consumer Market					
	Media Outlets	2015 Safety	2015 Black History Month	2015 Asian History Month	2015 Summer Readiness
Asian Media Outlets					
	Radio (Market)				
	EDI - KWRM AM 1370 (Mandarin)	X			X
	Network Asia - KAZN 1300 AM (Mandarin)	X			X
	VNCR (Vietnamese)	X			X
	Kali Cambodian (Cambodian)	X			X
	KMRB				X
	Radio Seoul - KMPC 1540 AM (Korean)	X			X
	Radio Korea - KFOX 1650 AM (Korean)	X			X
	Little Saigon Radio - KVN 1480 AM (Vietnamese)	X			X
	Saigon Radio Hai Ngoai - KALI 106.3 FM (Vietnamese)	X			X
	Network Asia - KMRB 1430 AM	X			X
	Radop L - KYPA 1230 AM	X			X

Appendix

SCE 2015 Advertising and Media					
African American Consumer Market Asian Consumer Market Hispanic Consumer Market					
	Media Outlets	2015 Safety	2015 Black History Month	2015 Asian History Month	2015 Summer Readiness
Asian Media Outlets					
	TV				
	KSCI 18	X			
	- IAVC	X			
	- ETTV	X			
	- ZWTV	X			
	- TVB	X			
	- KBS	X			
	- MBC	X			
	- Little Saigon	X			
	- Saigon TV	X			

Appendix

SCE 2015 Advertising and Media					
African American Consumer Market Asian Consumer Market Hispanic Consumer Market					
	Media Outlets	2015 Safety	2015 Black History Month	2015 Asian History Month	2015 Summer Readiness
Hispanic Media Outlets					
	Print				
	Eastern Group Publications	X			
	El Mojave	X			
	El Sol	X			
	La Opinion	X			
	Azteca News	X			
	La Prensa Hispana	X			
	HOY	X			
	Impacto	X			
	La Gaceta	X			
	Vida Newspaper Group	X			
	Día A Día	X			

Appendix

SCE 2015 Advertising and Media					
African American Consumer Market Asian Consumer Market Hispanic Consumer Market					
	Media Outlets	2015 Safety	2015 Black History Month	2015 Asian History Month	2015 Summer Readiness
Hispanic Media Outlets					
	Radio				
	KFSO- La Preciosa 92.9 FM	X			X
	KLAX-FM "La Raza" 97.9	X			X
	KLBN	X			X
	KLYY-FM	X			X
	KRDA-FM	X			X

Appendix

SCE 2015 Advertising and Media					
African American Consumer Market Asian Consumer Market Hispanic Consumer Market					
	Media Outlets	2015 Safety	2015 Black History Month	2015 Asian History Month	2015 Summer Readiness
Hispanic Media Outlets					
	Radio				
	KLLE-FM	X			X
	KOND-FM	X			X
	KHIT-FM	X			X
	KXOL	X			X
	KXXZ	X			X
	KBFP-AM	X			X
	KGST-AM	X			X
	KRQB	X			X
	KAEH	X			X
	KXRS	X			X
	KXLM	X			X
	KMLA	X			X
	KLUR	X			X
	KOXR	X			X

Appendix

SCE 2015 Advertising and Media					
African American Consumer Market Asian Consumer Market Hispanic Consumer Market					
	Media Outlets	2015 Safety	2015 Black History Month	2015 Asian History Month	2015 Summer Readiness
Digital	Partners				
	Online				
	Brightroll	I			
	CBS Digital	E			
	Conversant	I			
	Maxpoint Interactive				I
	Millennial Media	I			
	Pandora	E			I
	USA Today	E			E
	Videology	I			
	Time Warner				E
	Synacor				E
E = English Banner Ads I = In-language Banner Ads					

Southern California Edison ESA and CARE Enrollment, Penetration, and Expenditure Update

August 2015

Southern California Edison CARE Program

CARE Enrollment, Penetration and Expenditures

Year	Customers Enrolled	Estimated Eligible Customers	Penetration Rate	Expenditures	% of Authorized	Discounts
2015 – June 30	1,285,934	1,499,342	85.8%	\$1,629,847	23%	\$150,544,343
2014 Year-End	1,311,210	1,499,830	87.4%	\$5,094,434	73%	\$386,148,028
2013 Year-End	1,335,607	1,410,534	94.7%	\$4,797,688	39% *	\$358,025,586

Notes: * D.14-08-030 addressed SCE's Petition for Modification of D.12-08-044, filed in 2012, to reduce the 2012-2014 CARE Administration budget. The 2013 budget was reduced from \$12,256,000 to \$7,429,460.

Southern California Edison ESA Program

Number of Homes Treated and Program Expenditures

Year	Homes Treated	Goal	% of Goal	Expenditures	% of Authorized
2015 – June 30	22,594	87,389	26%	\$21,986,816	30%
2014 Year End	76,983	87,389	88%	\$55,886,233	77%
2013 Year End	69,031	87,389	79%	\$55,604,816	77%

Notes:

Southern California Edison ESA Program

Projected Year-End Expenditures and Unspent Funds

Projected Expenses 2015	Amount Authorized 2015	Projected Unspent Funds in 2015	Total Unspent Funds Through 2014	Projected Unspent Funds Through 2015
\$48,300,000	\$72,736,630	\$24,436,630	\$88,218,830	\$112,655,460

2009 - 2014	Total Unspent 2009 - 2014	Unspent as Percent Of Authorized	2009 - 2014 Explanation
Measures	\$71,211,022	20%	SCE underspent in all years except 2010. Reasons for underspending include: <ul style="list-style-type: none"> Nearly doubling budget in 2009 requiring workforce expansion Meeting homes treated goal in 2011 while underspending by \$13 million 2012 month-to-month bridge period created great program uncertainty In 2013 and 2014 factors include customer unwillingness and the Modified Three Measure Minimum Rule
Local & Statewide Marketing	\$3,863,803	65%	
Regulatory Compliance	\$1,154,126	39%	
General Administration	\$9,024,771	33%	
CPUC Energy Division	\$298,835	63%	
Other	\$2,666,273	24%	
Total	\$88,218,830	22%	

Notes: The authorized ESA budgets for 2009 – 2015 total approximately \$476 million

"Other" includes Training, Inspections, Studies, Pilots. "Measures" include Enrollment and In-home education

Southern California Edison ESA and CARE Workshops Update

August 2015

SCE 2015-17 ESA and CARE Application

- SCE's Application is designed to make progress towards the Commission's goals, including:
 - Encourage all eligible & willing customers to participate; protect ratepayers from ineligible participants
 - Make progress towards goal of providing all customers eligible for ESA the opportunity to participate
- SCE proposes eliminating rules that hinder provision of measures and Energy Education to eligible customers (e.g., Modified Three-Measure-Minimum [3MM] Rule and Go-Back Rule):
 - Simple-to-install measures, including Energy and Water Education, at every visit
 - Through June SCE enrolled 4,500 new participants (but did not treat the home) due to the 3MM Rule
- SCE proposes a multi-family strategy that integrates ESA program delivery with its EE programs, increasing the ability to serve tenants and property owners
- SCE proposes ESA water measures for single-family, multi-family, & mobile home customers:
 - Faucet Aerators & Low Flow Showerheads, Water Heater Blankets/Pipe Wrap, Thermostatic-Controlled Shower Valves (New), In-Home Energy Education
 - Will evaluate high-efficiency clothes washers and tub diverters mid-cycle
 - Water-Energy Calculator initial results show good benefits for water utilities (only 5% electric benefits)
- SCE proposes to return unspent funds annually (if any) to customers to alleviate rate impacts

Southern California Edison Contacts

CARE Program – Rosie Casillas, Manager
(626) 302-0715 rosie.casillas@sce.com

ESA Program – Roberto Del Real, Manager
(626) 302-0720 roberto.delreal@sce.com

Low Income Oversight Board Meeting

Southern California Gas Company

Highlights of 2014 CARE and ESA Programs M&O Ethnic & Ethnic Owned Accomplishments

*August 19, 2015
Santa Ana, CA*

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Agenda

1

- Introduction

2

- SoCalGas CARE and ESA Program M&O

3

- 2014 M&O Ethnic and Ethnic Owned Highlights

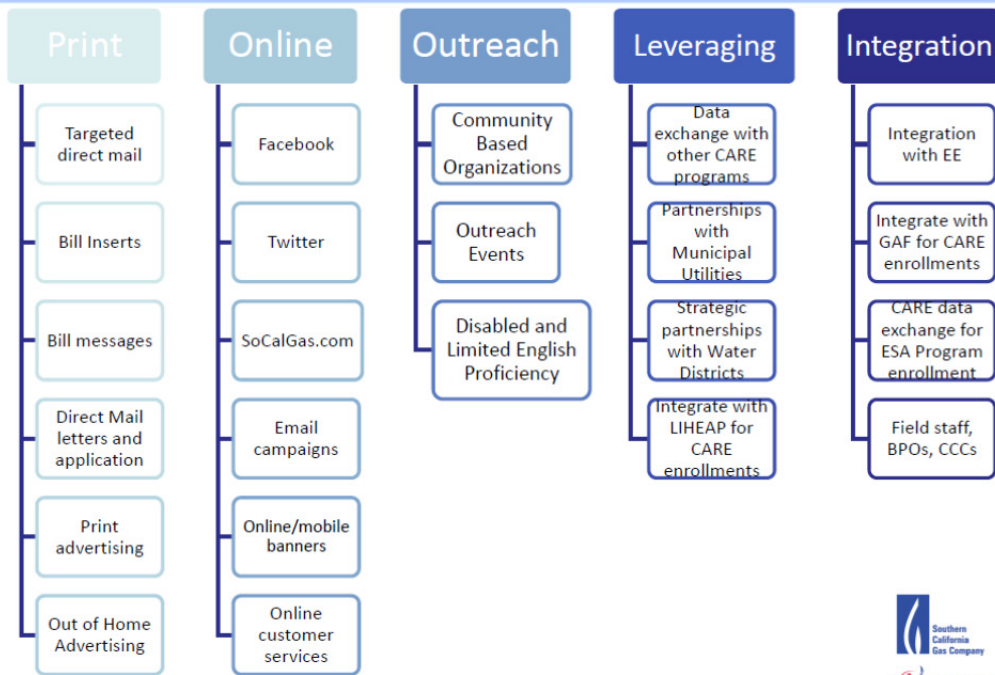
4

- 2014 Budget Spending Highlights

5

- 2015 Planned M&O

CARE/ESA Program Marketing & Outreach



3

CARE & ESA Program – Outreach and Enrollment Strategy

Target Hard-to-Reach Geographic Regions

Leveraging with CBOs and Non-profit organizations to build program awareness

Target customers with disabilities

Leverage relationships with Organizations that offer services to customers with disabilities

Outreach to Medical Baseline participants

Appeal to customer benefits and sustainability movement

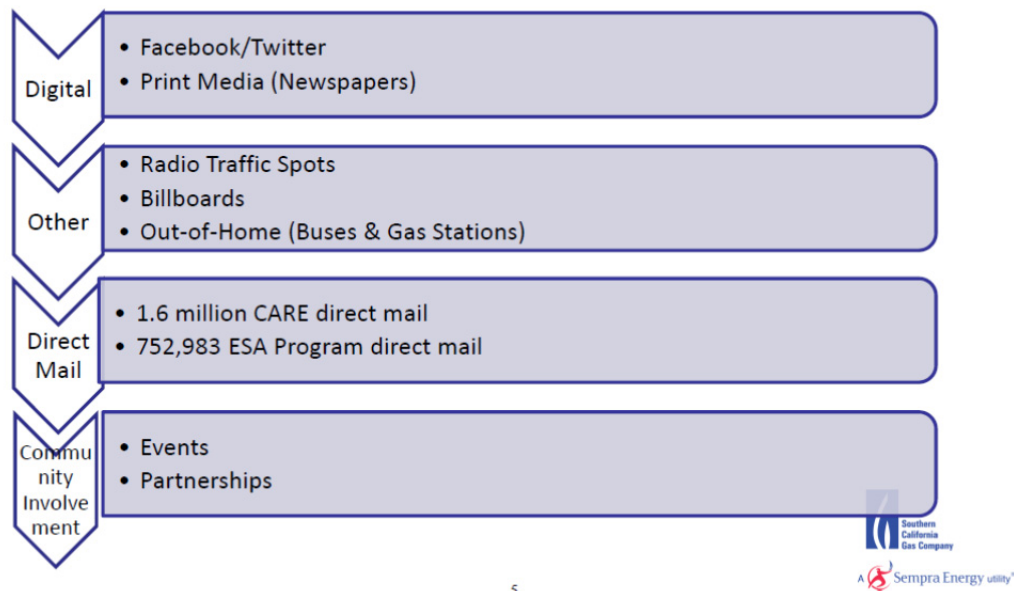
Utilize demographics data and customer segmentation analyses



4

CARE & ESA Program Ethnic Outreach in Mass Media Campaigns

In 2014 SoCalGas demonstrated its commitment to **Ethnic Outreach** in its Mass Media Campaigns



CARE/ESA Program Marketing & Outreach

ACTIVITIES

Print Campaigns:

- Bill inserts – to highlight the new CARE eligibility guidelines annually in June.
- Direct Mail letters/applications – to encourage customers to sign-up for the programs throughout the year.

Newspapers & Audience – Print advertising in ethnic-owned media, targeting Hispanic, African American, and Asian audiences.

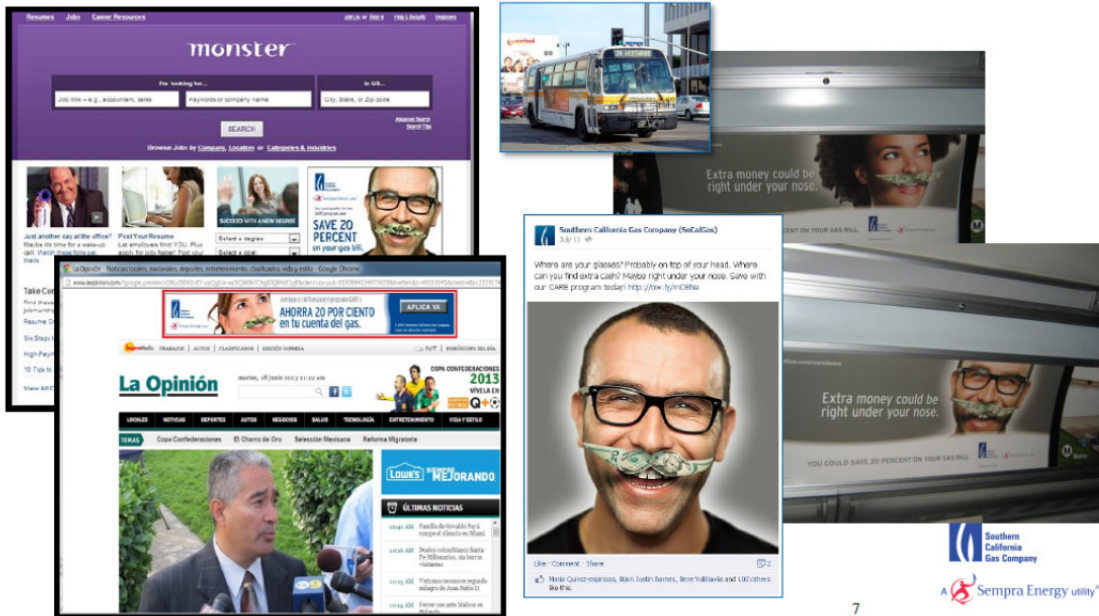
- Hispanic: Eastern Group Publications, La Opinión, HOY, La Nueva, San Fernando Valley/El Sol, La Nueva Voz, Vida and El Latino.
- African American: LA Watts Times, Our Weekly, Los Angeles Sentinel, The Wave Publication and LA Focus on the World.

Online/mobile banner ads – to create awareness among customers that may potentially be eligible for CARE, and also an opportunity to target customers that have already visited the website.

Out of Home advertising – interior/exterior bus ads, bus shelters, gas pump ads and tear sheets

CARE & ESA Program Marketing & Outreach

Digital Media, Outdoor Ad, Out of home and Social Media encouraging customers to apply for the CARE program.



CARE & ESA Program Marketing & Outreach

¡SOMOS PARTE DE TU COMUNIDAD!

SoCalGas
A Semptra Energy utility

¿Podrías ahorrar dinero y energía con los Programas de Asistencia al Cliente?

¡Sí! ¡Verás! Si calificas, visita socalgas.com (busca la palabra clave "ASISTENCIA").

Ahorra 20 por ciento en tu cuenta mensual de gas.

Mejora tu hogar para que use menos energía y sea más confortable, ¡sin costo para ti!

CALIFORNIA ALTERNATE RATES FOR ENERGY (CARE) – 20 Percent Discount

TARIFAS ALTERNAS PARA ENERGÍA DE CALIFORNIA (CARE) – Descuento del 20 por ciento en su cuenta de gas

APPLICATION INSIDE / SOLICITUD ADENTRO

WE ARE A PART OF YOUR COMMUNITY!

SoCalGas
A Semptra Energy utility

You could save up to 20 percent on your monthly gas bill through our CARE program, also see if you qualify to upgrade your home to be more comfortable and energy efficient at no cost to you.

Learn more at socalgas.com (Search "Assistance")

To save on your monthly gas bill call 1-800-342-4545

To upgrade your home call 1-800-331-7593

Energy Savings Assistance Program

© 2014 Southern California Gas Company. Trademarks are property of their respective owners. All rights reserved.

ENROLL TODAY AND SAVE!

Southern California Gas Company offers customer assistance programs that may help you save money and energy.

California Alternate Rates for Energy (CARE) offers 20 percent off your natural gas bill.

Energy Savings Assistance Program offers no cost energy-saving homes.

CARE & Medical Baseline:
1-800-331-7593

Energy Savings Assistance Program:
1-800-331-7593

Multi lingual Call Center available:
Cantonese: 1-800-427-1420
Korean: 1-800-427-0471
Mandarin: 1-800-427-1429
Vietnamese: 1-800-427-0478

Energy Savings Assistance Program

SoCalGas
A Semptra Energy utility

Print Ads

WE ARE A PART OF YOUR COMMUNITY!

You could save up to 20 percent on your monthly gas bill through our CARE program, also see if you qualify to upgrade your home to be more comfortable and energy efficient at no cost to you.

Learn more at socalgas.com (search "assistance")

To save on your monthly gas bill call 1-800-342-4545 to upgrade your home call 1-800-321-7593

SoCalGas
Sempra Energy utility

¡SOMOS PARTE DE TU COMUNIDAD!

ENROLL TODAY AND SAVE!

Southern California Gas Company offers customer assistance programs that may help you save money and energy.

California Alternative Rates for Energy (CARE) offers 20 percent off your natural gas bill.

Energy Savings Assistance Program offers no cost energy saving home improvements.

Medical Expense offers additional gas allowance (based on the lowest baseline rate) to qualifying medical conditions. Doctor certification is required.

For more information and to find out if you qualify, please visit socalgas.com (search "assistance"), or call today 1-800-451-0200.

CARE & Medical Expense
Korean: 1-800-451-0475
Mandarin: 1-800-451-0475
Vietnamese: 1-800-451-0475

Mùng Xuân Ất Mùi 2015
Celebrate

Hội Chợ Tết TET FESTIVAL

OC Fair & Event Center
801 Fair Dr., Costa Mesa, CA 92626

21-22 February 2015
February 21 - 10:00am
February 22 - 10:00am
February 23 - 10:00am

MARIACHI FESTIVAL

Costa Mesa, 21st November 2014
10:00am - 12:00pm
Admission: Free
1-800-755-7666 (Toll-free)
1-800-755-7666 (Toll-free)

Southern California Gas Company
Sempra Energy utility

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Multi-lingual Collateral

Spanish

PROGRAMAS DE ASISTENCIA AL CLIENTE

Portuguese

PROGRAMAS DE ASISTENCIA AL CLIENTE

Hindi

PROGRAMAS DE ASISTENCIA AL CLIENTE

Spanish

PROGRAMAS DE ASISTENCIA AL CLIENTE

Asian Languages

PROGRAMAS DE ASISTENCIA AL CLIENTE

Southern California Gas Company
Sempra Energy utility

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Community Based Organizations

Framework for Outreach Events

- Focus on Hard-To-Reach Communities
 - Customers with disabilities, with limited English Proficiency; Customers who are seniors; or Customers in rural communities
- Work with local community organizations
- Connect with the community & related programs
- Communicated/advertise through the community or through local media.

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Community Sponsorships Tet Festival



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Community Sponsorships Cuadrilla De Semana



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Community Partnerships Delhi Center, Santa Ana

Low-Cost Broadband & SoCalGas Low-Income Programs, June 2015

- “Bring your Gas Bill to the Event”
- Inform the audience on how to sign up for low-cost broadband
- Demonstrate the advantages of broadband connectivity, case study SoCalGas programs
- Go through CARE signs up with customers that have bill information.

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Community Partnerships Back to School Night

- Using Technology with SoCalGas and with Your Child's Education
- Back-to-School Night, Academy for Environment & Social Policy
 - Boyle Heights, Lincoln Heights Community
- Demonstration of:
 - Signing up for low-cost broadband
 - Using the SoCalGas website for energy efficiency information & low-income programs
 - Accessing the school portal for parent-student information.
- Follow up meetings and relationship with the school.



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Community Sponsorships Mariachi Festival



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Community Partnerships Westside Center for Independent Living

- Using Technology for Independent Living, June 2015
 - SoCalGas & WCIL & Telscape (Lifeline for Mobile)
 - Inform the audience on how to sign up lifeline for mobile.
 - Inform the audience on the similar eligibility guidelines for SoCalGas low-income programs.
 - Go through CARE signs up with customers that have bill information.



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Community Sponsorships SoCalGas & WCIL



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Community Sponsorships Santa Maria – CalFresh Outreach



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2014 CARE Program Budget*

<<<<< 2014 >>>>>

Budget Category	Authorized	Actual
Outreach	\$3,750,223	\$4,424,684
Processing, Certification, Recert.	\$4,488,248	\$1,033,376
Post Enrollment Verification	\$3,744,000	\$333,764
IT Programming	\$2,937,450	\$897,354
Pilots	\$180,000	\$75,000
Measurement & Evaluation	\$18,659	\$63,254
Regulatory Compliance	\$242,507	\$367,741
General Administration	\$943,426	\$808,918
CPUC Energy Division	\$60,000	\$17,512
SUBTOTAL MGMT BUDGET	\$16,364,513	\$8,021,603
Subsidies & Benefits	\$131,142,177	\$109,488,808
TOTAL PROGRAM BUDGET	\$147,506,690	\$117,510,411

* Table does not reflect fund shift activities performed to align budget with actual expenditures.



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2014 ESA Program Budget*

<<<< 2014 >>>>

Budget Category	Authorized	Actual
Energy Efficiency (Measures)**	\$121,317,558	\$85,793,909
Training Center	\$681,105	\$331,476
Inspections	\$3,361,051	\$1,799,868
Marketing & Outreach	\$1,198,436	\$1,187,445
Statewide ME&O	\$100,000	\$0
Measurement & Evaluation Studies***	\$91,667	\$(1,885)
Regulatory Compliance	\$295,333	\$248,650
General Administration	\$5,286,041	\$4,414,388
CPUC Energy Division	\$86,000	\$7,505
Total Program Costs	\$132,417,191	\$93,781,355

*Pursuant to D.14-08-030, budgets reflect the Phase II Decision authorized 2014 budget amounts.

**Category includes funds shifted to PY2014 in Appliances from PY2012 unspent funds.

***Credit balance in M&E of (\$1,885) associated with prior year activity.

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2014 Print Media Spending

Print Media: \$121,160.25

Hispanic	African American
El Aviso	LA Focus on the Word
La Prensa Hispana	LA Watts Times
Vida	Los Angeles Sentinel
Eastern Group	Our Weekly
El Sold de Valle	Wave Publications
Hoy	
La Nueva Voz	
La Opinion	
Santa Barbara Latino	

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2014 Media Spending

Digital = \$59,000	Radio = \$131,883	Outdoor = \$57,682	TV = \$3,000	Experiential = \$13,590
Hispanic	Hispanic	Hispanic	Hispanic	Grass Roots
Batanga	Radio Market Spanish Formats	Transit Bus (interiors)	KWHY	KWHY
Facebook	The Campesina Network (90.5 & 92.5)	Transit Bus (Kings)		
Bride Mob		Gas station ad		

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2014 Ethnic and Ethnic Owned Media Spending

Total Ethnic and Ethnic Owned Media Spend= \$383,315

"ONLY" Ethnic Owned Spending = \$177, 811

Market	Business	Live Dates	Spend
Hispanic	Eastern Group Publications	June 5 th and 19 th	\$5,326
	La Campesina Network	Year Round	\$120,000
	El Aviso		\$21,000
	La Prensa Hispana	Year Round	\$12,000
African American	Our Weekly	June 5 th , July 3 rd	\$5,894
Sub Total Spending			\$164,221
Hispanic Experiential Activations	The Regan Group	June 13 th to July 12 th	\$13, 590
Total Spending			\$177,811

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2015 (Planned) Media Spending

- Tri-Coastal Mass Media
 - Digital, Direct Mail, Print, Radio, Out of Home
 - Ventura, Santa Barbara, and San Luis Obispo Counties
- Asian Language Campaigns & Events
 - Tet
 - Cambodian New Year
 - Thai New Year



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CARE & ESA Program Marketing & Outreach



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SoCalGas CARE Program

CARE Enrollment, Penetration and Expenditures

Year	Customers Enrolled	Estimated Eligible Customers	Penetration Rate	Expenditures	% of Authorized	Discounts
2015 – June 30	1,564,499	1,899,163	82.38%	\$59,358,200	40.24%	\$55,601,596
2014 Year-End	1,568,011	1,898,302	82.60%	\$117,510,411	80.00%	\$109,488,808
2013 Year-End	1,604,411	1,798,002	89.23%	\$125,388,452	86.00%	\$118,556,705
Notes:						

1

SoCalGas ESA Program

Number of Homes Treated and Program Expenditures

Year	Homes Treated	Goal	% of Goal	2015 YTD Expenditures	% of Authorized
2015 – June 30	32,955	136,836	24.08%	\$37,596,719	28.39%
2014 Year End	92,967	136,836	67.94%	\$93,781,355	71.00%
2013 Year End	106,948	136,836	78.16%	\$97,554,614	83.00%
Notes:					

2

SoCalGas ESA Program

Projected Year-End Expenditures and Unspent Funds

Projected Expenses 2015	Amount Authorized 2015	Projected Unspent Funds in 2015	Total Unspent Funds Through 2014	Projected Unspent Funds Through 2015
\$80.8M*	\$131.4M	\$50.6M	\$113.3M	\$163.9M
2014		2014 Total Unspent****	Unspent as Percent Of Authorized	2014 Explanation
Measures**		\$104.4M	30%	Treated units below authorized.
Marketing & Statewide Marketing		\$0.7M	19%	Funding uncertainty associated with 6-month and month-to-month bridge funding in 2012.
Regulatory Compliance		\$0.1M	6%	Not applicable.
General Administration		\$2.5M	15%	Various.
CPUC Energy Division		\$0.2M	90%	Budget prepared per ED guidance.
Other ***		\$5.4M	44%	Treated units below authorized.
Total		\$113.3M	29%	

Notes:

* Projected based on trailing twelve month expenses through July. SoCalGas has identified several strategies designed to improve on current performance levels.
 ** Includes Energy Education and Customer Enrollment budgets.

*** Includes Training, Inspections and EM&V budgets.

**** Represents total carry forward balances as of year end 2014.

SoCalGas Utility Contacts

CARE Program – Carmen Rudshagen,
 Program Manager @
crudshagen@semprautilities.com

ESA Program – Mark Aguirre, Program
 Manager@ MAguirre2@semprautilities.com

Low Income Oversight Board

Marketing and Outreach Update and Overview

August 19, 2015



CARE & ESA Marketing & Outreach 2014 MEO Budget



Program	2014 CPUC Authorized	2014 MEO Budget Spent	% of 2014 MEO Budget Spent
CARE	\$2,300,352	\$2,434,024	106%
ESA	\$1,164,718	\$737,032	63%

CARE & ESA Marketing & Outreach 2014 Media Spend

Ethnicity	2014 Media Spend	% of total spend
African American	\$42,265	6%
Chinese	\$15,404	2%
Hispanic	\$171,596	23%
Filipino	\$16,290	2%
Vietnamese	\$7,840	1%
Total Ethnic Spend	\$253,395	34%
Total Overall Spend	\$750,637	

Ethnic media budget allocated across TV, Radio, Print, Online advertising

3

CARE & ESA Marketing & Outreach 2014 Highlights

General Awareness



- TV, print, radio, online advertising
- Social media
- Bill package
- SDG&E app and website

Partner Education & Outreach



- CARE capitation agencies
- Energy Solutions Partners
- Multifamily outreach
- ESA Contractor Outreach

Community Engagement



- Multicultural and rural outreach
- Seniors and special needs outreach
- SDG&E customer contact employees

Direct Marketing



- Electronic/Direct mail
- Outbound calls
- Door-to-door canvassing

4

CARE & ESA Marketing & Outreach 2014 Highlights



General Awareness

- TV, print, radio, online advertising
- Social media
- Bill package
- SDG&E app and website



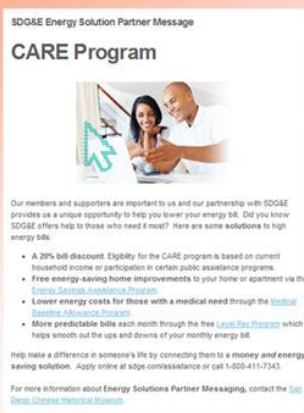
5

CARE & ESA Marketing & Outreach 2014 Highlights



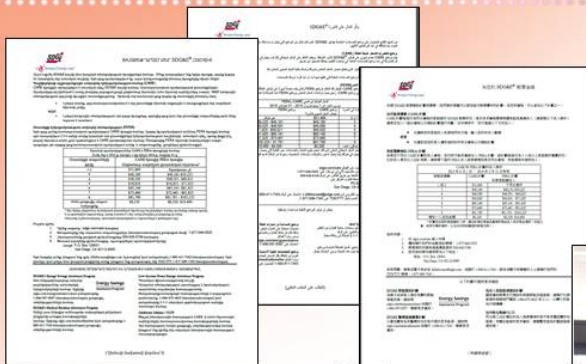
Partner Education & Outreach

- CARE capitation agencies
- Energy Solutions Partners
- Multifamily outreach
- ESA Contractor Outreach



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CARE & ESA Marketing & Outreach 2014 Highlights



In-Language Collateral



Branch Office Outreach



Ethnic Market Outreach

Community Engagement

- Multicultural and rural outreach
- Seniors and special needs outreach
- SDG&E customer contact employees

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CARE & ESA Marketing & Outreach 2014 Highlights

Find out if you qualify for a discount on your energy bill.

Income Qualification for CARE & FERA Programs
(Income must be 100% or less)

Number in Household	CARE PROGRAM	FERA PROGRAM
1 or 2	\$11,400	Not eligible
3	\$16,800	\$16,800 - \$46,475
4	\$21,750	\$21,750 - \$59,625
5	\$26,625	\$26,625 - \$66,775
6	\$31,500	\$31,500 - \$73,925
7	\$36,375	\$36,375 - \$81,075
8	\$41,250	\$41,250 - \$88,225

Each additional person, add \$5,125
\$6,125 - \$14,125

*2-person income requirement for FERA program
If you have questions or would like more information on what to know about SDG, please e-mail billboard@sdge.com or call us at 1-800-467-7343.

CARE Direct Mail

Don't miss out on an energy bill discount

You may qualify for at least a 20% savings on your energy bill!

Through the California Alternate Rates for Energy (CARE) program and the Energy Savings Assistance Program, eligible families can save at least 20% on their energy bill as well as receive free home improvements or appliances with new income guidelines in place, more families are now eligible.

Start the Application

You will need your 10-digit account number found on your SDG&E bill.

To learn more, connect at sdge.com/care

View the income table and see if you qualify.

People in Household	Total Household Income
1-2	\$31,460

CARE/ESA Email



ESA Contractor Canvassing

Direct Marketing

- Electronic/Direct mail
- Outbound calls
- Door-to-door canvassing

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CARE & ESA Marketing & Outreach 2015 YTD MEO Budgets

Program	2015 Authorized MEO Budget	2015 MEO Budget Spent YTD	% of 2015 MEO Budget Spent
CARE	\$2,300,351	\$1,253,880	54%
ESA	\$1,240,563	\$441,494	36%

- YTD as of 6/30/15
- ESA MEO requested budget for 2015 includes Special Initiatives – awaiting CPUC decision before moving forward

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CARE & ESA Marketing & Outreach 2015 Additional New Tactics

General Awareness



- new testimonials featuring actual SDG&E customers who participated in both CARE and ESA programs

Partner Education & Outreach



- live call campaigns for both CARE new enrollment and recerts
- Lifeline/Covered CA Partnership

Community Engagement



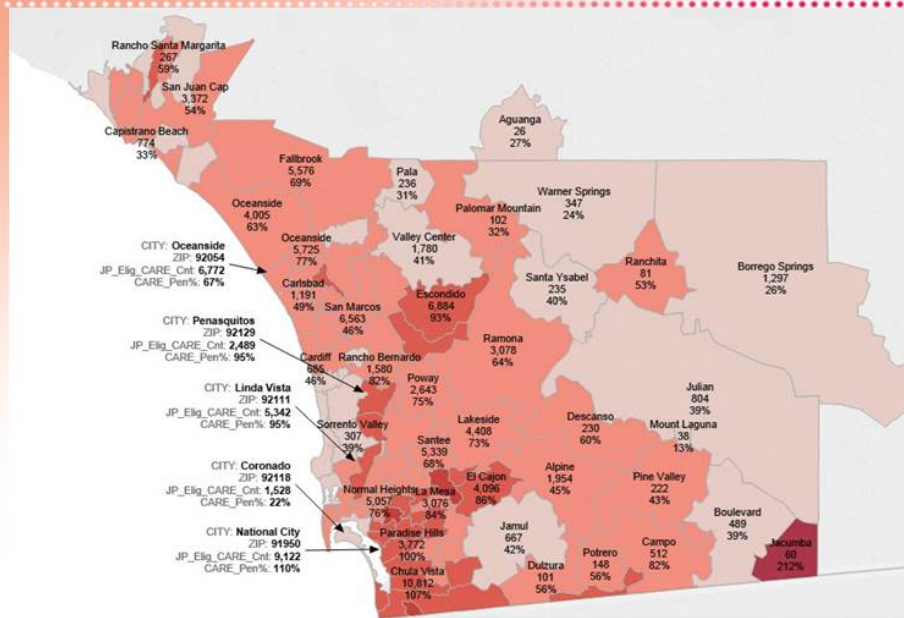
- new partnerships in rural and high poverty areas
- feedback sessions to review and share results/best practices
- increased participation at partner events in rural zip codes

Direct Marketing



- enhanced segmentation and targeting using SDG&E customer profiles and Athens Research
- coordinated multi-touch effort with Partner Outreach and canvassing
- ESA post-treatment energy education for all household members

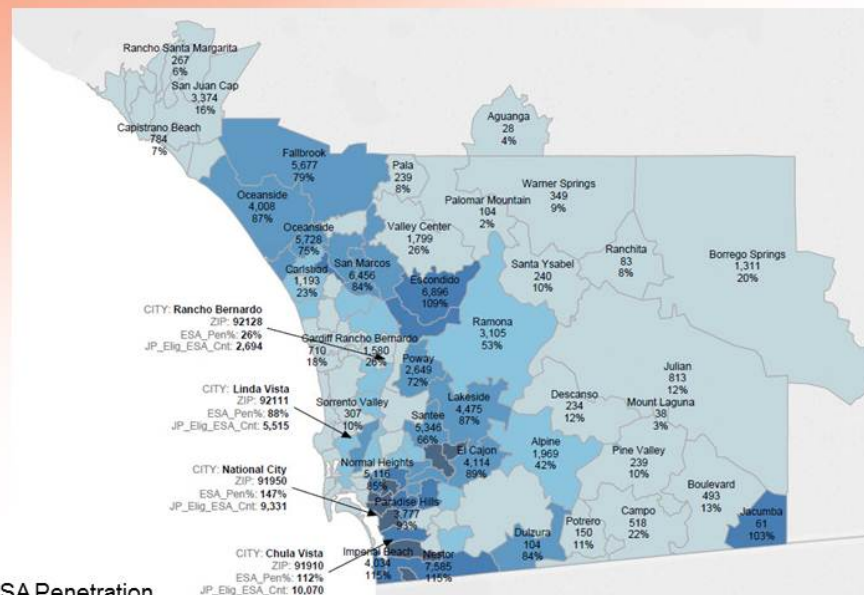
CARE Marketing & Outreach 2015 Eligible Counts (Peterson Data) and Penetration



Legend: CARE Penetration

<43%	43%-84%	85%-126%	127%-168%	> 168%
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ESA Marketing & Outreach 2015 Eligible Counts (Peterson Data) and Penetration



Legend: ESA Penetration

<26%	27%-52%	53%-88%	89%-127%	> 127%
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SDGE MEO Contact Info



CARE / ESA Marketing and Outreach Team

Name	Title	Phone	Email
Horace (Ty) Tantum	Marketing Manager	858-636-5580	HTantum@semprautilities.com
Claire Luffborough (Presenter)	Sr. Marketing Advisor	858-650-6122	CLuffborough@semprautilities.com
Kelly Prasser	Outreach & Engagement Manager	619-696-4230	KPrasser@semprautilities.com
Laura Welty	Outreach Supervisor	619-540-3914	LKWelty@semprautilities.com

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Appendix

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CARE Marketing & Outreach

Categorical Budget Percentages by Enrollment

CARE 2015 ESTIMATED ENROLLMENTS Target: 72,000				
MEO Category	Estimated Total Cost	Estimated Number of Customers Reached	Estimated Number of Customers Enrolled	Estimated Percent of Enrollments
Door-to-Door	280,000	25,000	9,000	13%
Mass Marketing	931,457	Not Available	20,000	28%
SDG&E Branch Offices	0	48,500	7,500	10%
Third Party & Community Outreach	450,000	Not Available	8,000	11%
SDG&E Customer Contact Center	0	180,000	8,000	11%
Data Sharing	0	2,500	2,500	3%
Bill Inserts	80,000	950,000	500	1%
Direct Mail	70,000	200,000	6,000	8%
Other			10,500	15%
TOTAL	\$1,811,457		72,000	100%

- "Not Available" tactics reach a number of customers that is difficult to assess. These tactics are used to support increase customer awareness and drive customers to take action through a community organization or self-service option, such as the IVR or web application.
- Mass Marketing includes Television, phone, print, and, email blast. Enrollments numbers include IVR and internet enrollments generated from these efforts.

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ESA Marketing & Outreach

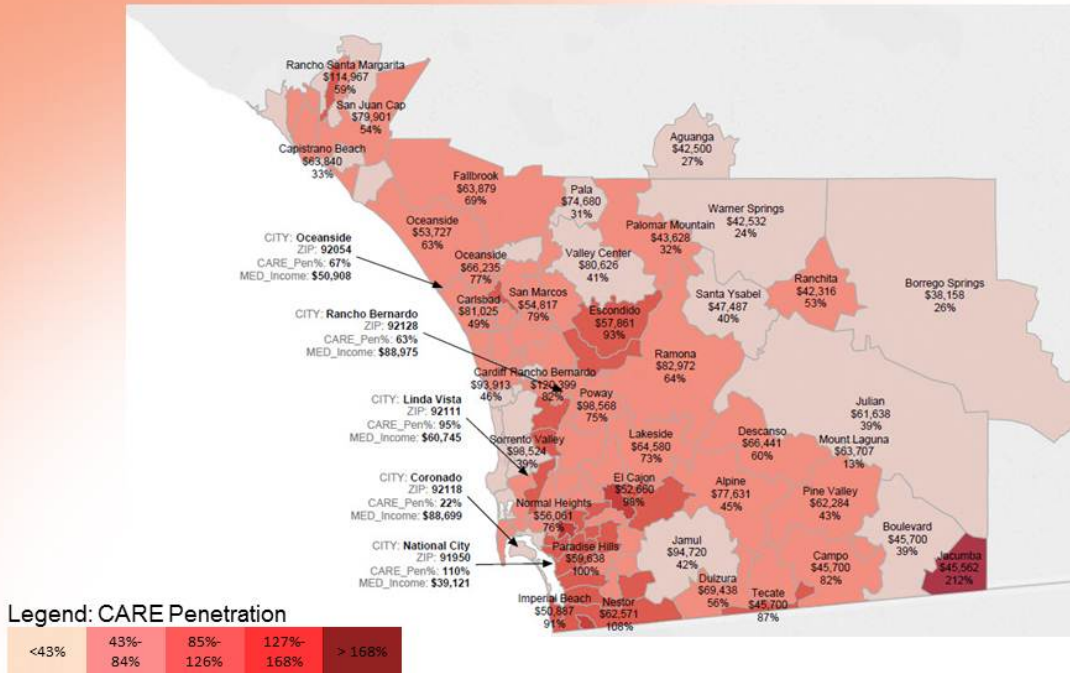
Categorical Budget Percentages by Enrollment

ESA 2015 ESTIMATED ENROLLMENTS Target: 20,216				
MEO Category	Estimated Total Cost	Estimated Number of Customers Reached	Estimated Number of Customers Enrolled	Estimated Percent of Enrollments
Door-to-Door	2,000	25,000	9,000	13%
Mass Marketing	545,627	Not Available	20,000	28%
SDG&E Branch Offices	0	48,500	7,500	10%
Third Party & Community Outreach	101,100	Not Available	8,000	11%
Call Center Support	129,600	180,000	8,000	11%
Data Sharing	0	2,500	2,500	3%
Collateral Support	231,236	950,000	500	1%
Direct Marketing	40,000	200,000	6,000	8%
Special Initiatives	191,000	n/a	n/a	n/a
TOTAL	\$1,240,563		20,316	100%

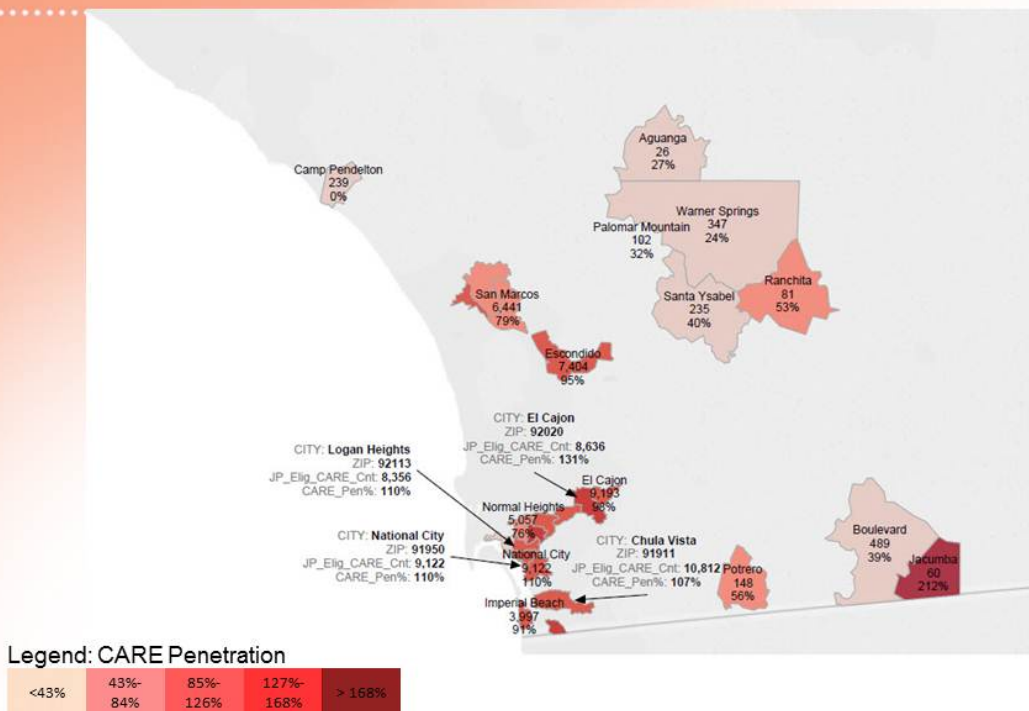
- "Not Available" tactics reach a number of customers that is difficult to assess. These tactics are used to support increase customer awareness and drive customers to take action through a community organization or self-service option, such as the IVR or web application.
- Mass Marketing includes Television, phone, print, and, email blast. Enrollments numbers include IVR and internet enrollments generated from these efforts.
- Door-to-Door enrollment estimates include ESA Contractor outreach efforts

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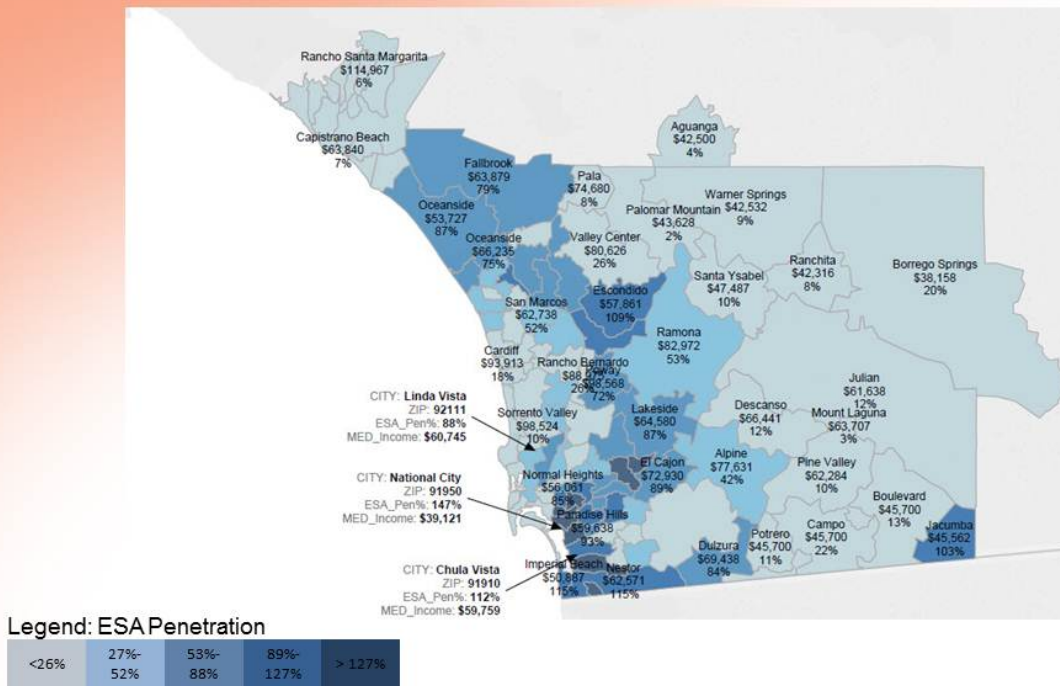
CARE Marketing & Outreach 2015 Penetration Levels by Median Income



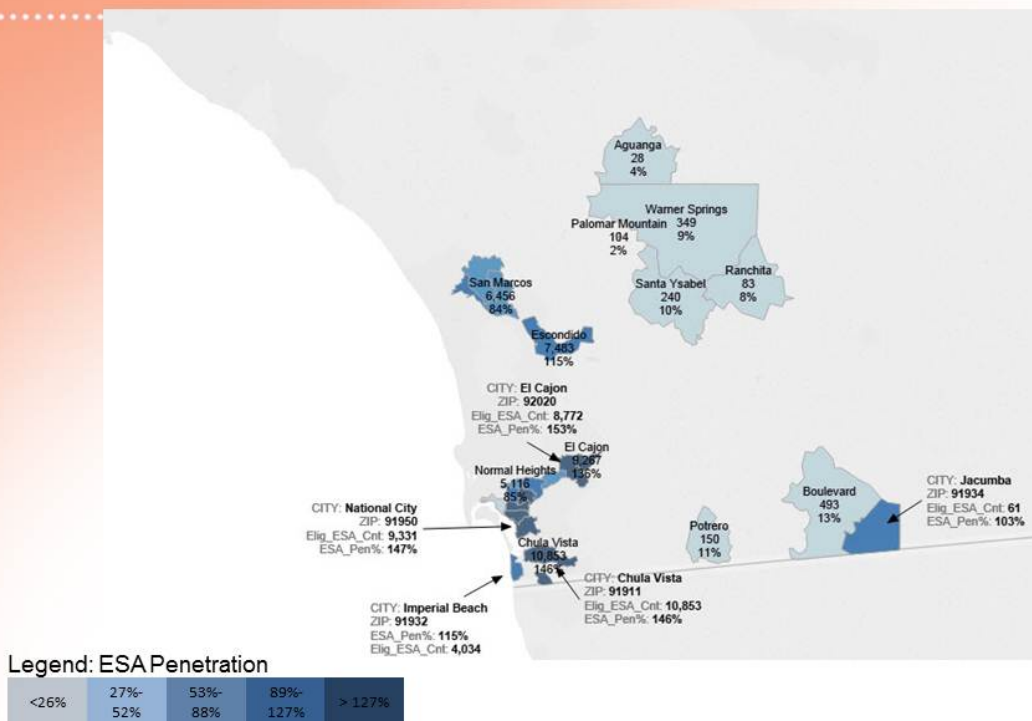
CARE Marketing & Outreach 2015 Eligible Counts and Penetration – High Poverty Areas



ESA Marketing & Outreach 2015 Penetration Levels by Median Income



ESA Marketing & Outreach 2015 Eligible Counts and Penetration – High Poverty Areas



SDG&E CARE Program

CARE Enrollment, Penetration and Expenditures

Year	Customers Enrolled	Estimated Eligible Customers	Penetration Rate	Expenditures	% of Authorized	Discounts
2015 – June 30	272,892	370,088	74%	\$2,535,330	46%	\$27,876,652
2014 Year-End	278,931	368,229	76%	\$4,530,706	82%	\$63,897,068
2013 Year-End	300,554	353,997	85%	\$3,453,771	63%	\$64,079,640

Notes:

June 2015 CARE program data reported in SDG&E's Monthly Low Income Report submitted to CPUC July 21st.
2014 and 2013 Annual data reported in SDG&E's Low Income Report submitted to CPUC May 1 of each year.

1

SDG&E ESA Program

Number of Homes Treated and Program Expenditures

Year	Homes Treated	2015 Goal	% of Goal	2015 YTD Expenditures	% of Authorized
2015 – June 30	6,400	20,316	32%	\$8,360,920	35%
2014 Year End	22,039	20,316	108%	\$19,143,282	71%
2013 Year End	17,568	20,316	86%	\$17,874,649	81%

Notes:

June 2015 ESA Program data reported in SDG&E's Monthly Low Income Report submitted to CPUC July 21st.
2014 and 2013 Annual data reported in SDG&E's Low Income Report submitted to CPUC May 1 of each year.

2

SDG&E ESA Program

Projected Year-End Expenditures and Unspent Funds

Projected Expenses 2015	Amount Authorized 2015	Projected Unspent Funds in 2015	Total Unspent Funds Through 2014	Projected Unspent Funds Through 2015
\$26,904,989	\$23,772,250	(\$3,132,739)	\$20,078,232	\$16,945,493

Total Unspent Funds by Category through 2014

Category	Total Unspent	Unspent as Percent Of Authorized	
Measures ¹	\$14,972,305	10%	SDG&E calculated the unspent ESA Program funds from 2006 through 2014. Unspent funds are attributable to : 1) Timing of the Phase II low income decision which granted SDG&E's budget augmentation. Timing led to a delay in implementing some of SDG&E's program plans 2) Timing of the decision also caused SDG&E to limit go-backs 3) The measure mix provided to dwelling varied from SDG&E's forecast.
Marketing & Statewide Marketing	\$1,639,136	23%	
Regulatory Compliance	\$797,437	30%	
General Administration	\$2,268,265	16%	
CPUC Energy Division	\$208,675	63%	
Other ²	\$192,415	14%	
Total	\$20,078,232	12%	

Notes:

¹ Includes In-Home Education and Customer Enrollment

² Other = Inspections, and Evaluations/Studies categories

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SDG&E Contacts

CARE & ESA Program – Joy Yamagata
 Regulatory Manager 858-654-1755
 JYamagata@semprautilities.com

PG&E ESA-CARE Program Update

Low Income Oversight Board Meeting
Large Utilities Workshop on CARE and ESA
Santa Ana, CA
August 19, 2015



Low Income Program Marketing Outreach

Low Income Oversight Board Meeting



Process for selecting marketing campaigns



How marketing defines hard-to-reach

Customers are more challenging to enroll due to barriers such as:

- Varying cultures
- Ethnicities
- Languages
- Disabilities
- Avoid charity
- Suspicious of the intent of assistance programs

PG&E Testimony Page 2-54—2-55

3

PG&E CARE – 2014 Marketing Outreach

Background:

- Launched several multi-touch and multi-channel acquisition campaigns

Target Audience:

- High propensity for eligibility and those who previously participated but did not recertify

Results:

Channel	# of Total Enrollments	% of Total Enrollments
Direct Mail, Email, AVM	80,000	23%
Bill Inserts	26,000	8%
Digital Media	15,000	5%
Telemarketing	3,000	1%

Source: Program Annual Report, For Program Year 2014

Sample Email Creative

Pacific Gas and Electric Company, 177 Beale St., San Francisco, CA 94105 | pgae.com | [privacy](#) | [disclosure](#)
 To be removed from this email list, please click to [unsubscribe](#) to send an email to Pacific Gas and Electric Company.
 We respect your privacy. Please review our [privacy policy](#) for more information.
 *PG&E refers to Pacific Gas and Electric Company, a subsidiary of PG&E Corporation. ©2014 Pacific Gas and Electric Company. All rights reserved. These offerings are funded by California utility customers and administered by PG&E under the auspices of the California Public Utilities Commission. CCA-0714-2838

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CARE – 2015 Marketing Outreach

Background:

- Launched several multi-touch and multi-channel acquisition campaigns

Target Audience:

- High propensity for eligibility and those who previously participated but did not recertify

Sample Results as of June 2015:

Channel	# of Total Enrollments	% of Total Enrollments
Direct Mail, Email, AVM	22,000	17%
Bill Inserts	10,000	8%
Digital Media	8,000	6%
Telemarketing	300	0.3%

Sample Direct Mail Creative

Cut your energy bills by at least 30%.*

Reduzca sus facturas de energía por lo menos en un 30%.*

Join the 1.4 million Californians who are saving at least 30%* on their energy bills.

Únase a los 1.4 millones de californianos que están ahorrando por lo menos 30%* en sus facturas de energía.

More than 1.4 million Pacific Gas and Electric Company (PG&E) customers just like you are receiving big discounts—at least 30%—on their energy bills.*

Más de 1.4 millones de clientes de Pacific Gas and Electric Company (PG&E) como usted están recibiendo grandes descuentos—por lo menos de un 30%—en sus facturas de energía.*

Join the California Alternative Rates for Energy (CARE) Program and you could save every month, just like they are. Apply now—it takes a few minutes.

Ínscrbase en el programa California Alternative Rates for Energy (CARE) y al igual que ellos, usted también podría ahorrar cada mes. Haga su solicitud ahora—sólo toma unos minutos.

Start now:
Online—Go to pge.com/careenroll. It's the fastest way to apply.
Phone—Call us at 1-866-743-2272 and we'll walk you through it.

Empiece ya:
En línea—Váyase a pge.com/careenroll. Es la manera más rápida de hacer la solicitud.
Por teléfono—Llámenos al 1-866-743-2272 y le guiamos a través del proceso.

You'll also need your account number, so have a recent PG&E bill handy and get ready to save!

También necesitará su número de cuenta, por lo tanto, tenga a la mano una factura de PG&E. ¡Y prepárese para ahorrar!

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CARE – 2015 Outreach Calendar

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Direct Mail												
Email												
AVM												
Telemarketing												
Bill Inserts												
Digital + Media												
Welcome Kit												



CARE – 2014 Community Engagement

Background:

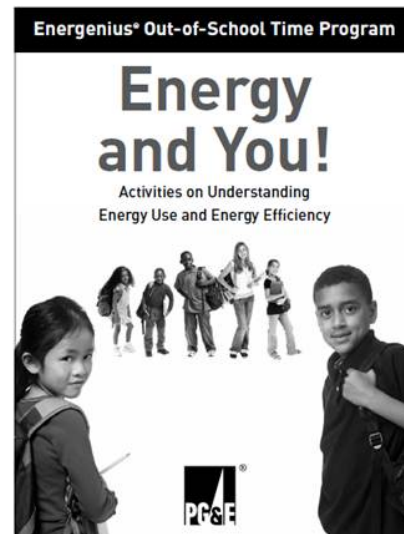
- Continued to support Community Outreach Contractors (COCs)
- Developed new partnership with Cal-SAC and modified Energenius Curriculum and Family Engagement packet

Target Audience:

- Hard-to-Reach eligible populations who prefer in-language and acculturated in-person outreach
- Customers reaching out to Local Customer Service Offices to make payments and receive assistance

Sample Results:

- 726 enrollments through COCs
- 10,524 enrollments through Local Customers Service Office



Source: Program Annual Report, For Program Year 2014

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CARE – 2015 Community Engagement

Background:

- Increased training and resources for Community Outreach Contractors (COCs)
- Develop Community Ambassador Program to have COCs help customers respond to Post-Enrollment Verification and High Usage communications
- Partner with community health outreach workers to reach Spanish speaking populations

Target Audience:

- Hard-to-Reach eligible populations who prefer in-language and acculturated in-person outreach
- Customers utilizing Local Customer Service Offices on payments and assistance

Sample Results:

- 566 enrollments through COCs
- 2,633 enrollments through Local Customers Service Offices

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ESA – 2014 Marketing Outreach

Background:

- Launched two multi-touch and multi-channel acquisition campaigns

Target Audience:

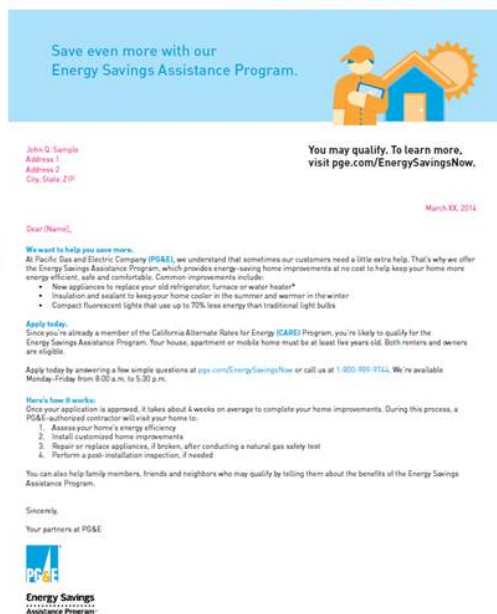
- Participating in the CARE Program
- Premise is at least five years old and has not been previously treated

Sample Results:

- Direct mail, email, automated voice messages generated close to 15,000 treated homes - 13% of total treated homes

Source: Program Annual Report, For Program Year 2014

Sample Direct Mail Creative



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ESA – 2015 Marketing Outreach

Background:

- Launched two multi-touch and multi-channel acquisition campaigns

Target Audience:

- Participating in the CARE Program
- Premise is at least five years old and has not been previously treated

Sample Results as of June 2015:

- Direct mail, email and automated voice messages has generated close to 6,000 applications
- Bill inserts has generated over 14,000 applications

Sample Direct Mail Creative



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ESA – 2015 Outreach Calendar

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Direct Mail												
Email												
AVM												
Bill Inserts												
Digital + Media												



CARE & ESA – Budgets

CARE Program	2014 Authorized*	2014 Actual	2015 Authorized*	2015 Actual to Date (June)
Marketing and Outreach	\$7,246,455	\$6,183,947	\$7,246,455	\$2,910,738

CARE Outreach Category	% of Outreach Actual in 2014	% of Outreach Actual in 2015 (June)
Acquisition	85%	70%
Retention	15%	13%
Community Engagement	6%	17%

* Includes \$1.4M retention outreach budget that was authorized under General Administrative budget category

ESA Program	2014 Authorized	2014 Actual	2015 Authorized	2015 Actual to Date (June)
Marketing and Outreach	\$1,943,151	\$1,788,107	\$1,943,151	\$595,343

ESA Outreach Category	% of Outreach Actual in 2014	% of Outreach Actual in 2015 (June)
Acquisition	100%	30%

Source: Program Annual Report, For Program Year 2014

CARE and ESA Program Updates

Low Income Oversight Board Meeting



Overview Agenda

1. CARE and ESA Overview - Tables
2. ESA Unspent Carryover Funds - Tables
3. Unspent Funds
4. ESA Enhancements
5. Water and Drought Emergency Measures
6. Energy-Water Leveraging Pilot
7. Proposed Multifamily Strategy
8. 2015 MF Whole Building Project



CARE and ESA Overview

PG&E CARE Program CARE Enrollment, Penetration and Expenditures

Year	Customers Enrolled	Estimated Eligible Customers	Penetration Rate	Expenditures	% of Authorized	Discounts
2015 -- June 30	1,405,613	1,635,673	86%	\$ 5,701,694	36%	\$ 248,053,955
2014 -- Year-End	1,413,334	1,648,774	86%	\$ 12,281,846	78%	\$ 607,206,765
2013 -- Year-End	1,386,070	1,574,844	88%	\$ 8,826,133	61%	\$ 703,432,080

PG&E ESA Program Number of Homes Treated and Program Expenditures

Year	Homes Treated	Goal	% of Goal	Expenditures	% of Authorized
2015 -- June 30	51,209	119,940	43%	\$67,011,807	41%
2014 -- Year-End	123,539	119,940	103%	\$145,940,449	88%
2013 -- Year-End	123,566	119,940	103%	\$142,181,389	91%

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ESA Unspent Carryover Funds

Projected Year-End Expenditures and Unspent Funds

Projected Expenses 2015	Amount Authorized 2015	Projected Unspent Funds in 2015	Total Unspent Funds Through 2014 ¹	Total Projected Unspent Funds Through 2015
\$147,300,000	\$160,133,351	\$12,833,351	\$95,759,757	\$108,593,108

¹ Includes \$41.1M in electric funds from 2009-2011 that PG&E has requested in its 2015-2017 Application to be applied to the authorized 2016 revenue requirement.

Total Unspent Funds by Category 2009 through December 2014

Category	Total Unspent	Unspent as Percent Of Authorized	Explanation ⁴
Measures ¹	\$72,234,750	9%	Fund shifting rule restrictions between categories
PG&E Marketing & Statewide Marketing ²	\$2,166,628	20%	Marketing efforts lower in previous years, increased contractor support to locate customers
Regulatory Compliance	\$630,424	31%	Amount varies per year depending on Regulatory needs and requests
General Administration	\$4,123,249	18%	Increased efficiencies led to lowered expenses
CPUC Energy Division	\$272,581	59%	Same amount budgeted annually, actual expenses based on Energy Division needs.
Other ³	\$16,332,123	39%	NGAT inspection costs moved to GRC
Total	\$95,759,757	11%	

¹ Includes In-Home Education and Customer Enrollment

² Statewide Marketing has no unspent funds

³ Includes Training, Inspections, and Evaluations/Studies

⁴ Utilities must not overspend authorized budgets to avoid mid-cycle program shut down.

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Unspent Funds

PG&E would consider reallocating unspent carryover to the following areas:

- 1. Measures (address removing measure caps)**
- 2. Water-Energy Nexus and Drought**
- 3. Pilots and General Administration**
 - Water Leveraging Initiative
 - MF Whole Building Initiative
 - HAN Pilot
 - Individualized Energy Education Follow-up using Customer Bill Information (Big Data Analytics)
 - Consumption-Driven Weatherization
- 4. Return balance to ratepayers**

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ESA Enhancements

- **Remove Measure Caps**
 - PG&E is removing measure caps on CFLs and water measures to provide customers with all of the energy and water-savings measures they qualify to receive.
- **Add Measures to the 2016-2017 ESA Program**
 - PG&E will provide LEDs instead of CFLs to ESA participants.
 - PG&E will provide HE Furnaces to qualifying ESA customers.
 - PG&E is investigating additional water-savings measures.
- **Increase Water Emergency Activities and Measures**

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Water and Drought Emergency Measures

PG&E's ESA Program includes the following water measures:

- Faucet aerators, pipe wrap, low flow showerheads, water heater blankets, thermostatic shower valves, hot water heaters

New measures proposed in our 2015-17 Application:

- HE Clothes Washers
- Water Education

PG&E is investigating the following additional water measures, costs and coordination (ESA, rebates, water agencies):

Toilet leak detection, toilet flappers, toilet tank water displacement/bags, shut-off hose nozzles, evaporative cooler leak devices, HE toilets, HE dishwashers, tub spout diverters

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Energy-Water Leveraging Pilot

Purpose: Develop a strategic plan to integrate existing water conservation program offerings with ESA Program offerings to reduce the impact on California's severe drought.

This blueprint for co-funded energy-water conservation program to serve ESA customers, includes:

- Memorandum of Agreement between energy IOUs and water utilities
- Cost sharing model
- Expanded water conservation education and installed measures for low-income households
- Plan for weatherization contractors to provide service to customers with gas or electric only energy IOU service

Key Activities currently completed or underway:

- Examine existing water conservation programs
- Develop strategies to mitigate barriers to collaboration between energy IOU and water utility
- Engage stakeholders in design of test program
- Pilot test collaborative program with two water utilities

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Energy-Water Leveraging Pilot

PG&E is currently negotiating an agreement with two water agencies, and is discussing partnerships with eight others .

Through the Water Utility Partnerships, PG&E will:

- Provide indoor and outdoor water audits and water education to low income customers as part of our ESA home assessment
- Provide an increased selection of hot and cold water saving measures to customers by leveraging ESA and water utility program funding
- Provide expanded water conservation measures for low-income households include rebates for HE Clothes washers and HE toilets.

Increased funding will allow PG&E to add additional Water Utility Partners and additional measures.

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Proposed Multifamily Strategy

Continues overall ESA Program strategy to offer free, direct-install measures to low income tenants while helping MF building owners understand all MF energy efficiency offerings available to them, including rebates and comprehensive whole building strategies.

- Facilitates simplified enrollment process into all available PG&E programs
 - Multifamily Rebates
 - EUC Home Upgrade Program
 - MASH
 - Demand Response
 - Energy Alerts, rates
 - MyEnergy at pge.com
- Provides information on MF Building owner financing options, available Low Income Housing Tax Credit information, on-bill financing opportunities Multifamily Energy Efficiency Rebate Programs (MFEER) available to the customer
- One-stop shop approach provides invisible integration from customers' perspective
- Reduced customer touches through contractors' ability to offer multiple programs

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2015 MF Whole Building Project

Purpose: To develop a coordinated approach to comprehensively treat MF buildings by incorporating offerings of ESA, MIDI, MFEER, EUC Home Upgrade Program and other programs using a Single Point of Contact (SPOC) to lead the building owner through the process.

- ESA continues to offer services to tenants, but will also target building owners to explain ESA and MF offerings.
 - Targeting sources include: contractor-driven projects, MF housing organizations, buildings undergoing substantial retrofit, HUD and TCAC referrals, other MF property marketing and outreach.
- ESA-SPOC provides layered approach: ascertaining interest of building owner in free tenant-based ESA measures, prescriptive rebates available through MFEER and other EE programs, or comprehensive retrofit opportunities available through EUC Home Upgrade Program.
- One-stop shop approach helps building owner through applicable EE program processes, and coordinates ESA income verification and installations.

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2015 MF Whole Building Project

The Coordinated ESA MF Project will weatherize 5 MF buildings using the coordinated energy efficiency approach

- Planning and Development
 - Review MF and LINA recommendations and incorporate best practices
 - Prepare detailed catalogue of PG&E's current multifamily offerings, policies and procedures
 - Identify and address known barriers to MF participation (including split incentives, property owner waivers, income qualification, etc.)
- Study Implementation and Evaluation
 - Develop contractor training, and MF building outreach and education materials
 - Weatherize 5 MF buildings
 - Implement coordination strategy with external agencies
 - Utilize ESA-SPOC project coordinator

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Questions?



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Appendix

Low Income Oversight Board Meeting



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CARE – 2015 Saturation By County (1)

County	Estimated Eligible Households	Total Households Enrolled	Penetration Rate	County	Estimated Eligible Households	Total Households Enrolled	Penetration Rate
ALAMEDA	143,843	123,499	86%	KINGS	9,523	8,785	92%
ALPINE	143	11	8%	LAKE	16,286	12,152	75%
AMADOR	4,768	4,212	88%	LASSEN	172	187	109%
BUTTE	38,531	35,337	92%	MADERA	23,575	20,878	89%
CALAVERAS	7,983	5,463	68%	MARIN	18,745	12,272	65%
COLUSA	2,765	3,324	120%	MARIPOSA	3,542	2,304	65%
CONTRA COSTA	95,696	83,857	88%	MENDOCINO	16,022	10,220	64%
EL DORADO	15,963	11,134	70%	MERCED	39,849	39,346	99%
FRESNO	137,634	145,899	106%	MONTEREY	44,916	40,963	91%
GLENN	4,177	4,705	113%	NAPA	12,912	10,488	81%
HUMBOLDT	22,252	18,050	81%	NEVADA	11,430	9,012	79%
KERN	92,767	98,099	106%	PLACER	30,080	20,572	68%

Source: Program Monthly Report, For June 2015

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CARE – 2015 Saturation By County (2)

County	Estimated Eligible Households	Total Households Enrolled	Penetration Rate	County	Estimated Eligible Households	Total Households Enrolled	Penetration Rate
PLUMAS	3,745	1,719	46%	SIERRA	312	142	45%
SACRAMENTO	148,314	105,927	71%	SISKIYOU	21	8	38%
SAN BENITO	6,430	4,830	75%	SOLANO	41,925	40,963	98%
SAN BERNARDINO	397	297	75%	SONOMA	52,975	41,091	78%
SAN FRANCISCO	78,175	62,494	80%	STANISLAUS	62,728	50,871	81%
SAN JOAQUIN	87,372	87,973	101%	SUTTER	13,051	13,615	104%
SAN LUIS OBISPO	34,067	18,904	55%	TEHAMA	10,798	11,475	106%
SAN MATEO	48,507	34,711	72%	TRINITY	427	290	68%
SANTA BARBARA	20,066	17,010	85%	TULARE	9,190	9,250	101%
SANTA CLARA	124,730	105,115	84%	TUOLUMNE	9,780	7,113	73%
SANTA CRUZ	26,835	20,014	75%	YOLO	24,913	20,271	81%
SHASTA	26,682	19,462	73%	YUBA	10,657	11,299	106%

Source: Program Monthly Report, For June 2015

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ESA – 2015 Saturation By County (1)

County	Estimated Eligible Households	Total Households Treated	County	Estimated Eligible Households	Total Households Treated
ALPINE	144	-	LAKE	16,448	347
AMADOR	4,819	221	LASSEN	172	2
BUTTE	40,116	934	MADERA	23,898	486
CALAVERAS	8,015	232	MARIN	21,427	56
COLUSA	2,822	194	MARIPOSA	3,628	16
CONTRA COSTA	105,634	3,648	MENDOCINO	16,302	242
EL DORADO	16,019	547	MERCED	41,051	1,567
FRESNO	144,236	6,267	MONTEREY	49,422	1,881
GLENN	4,255	264	NAPA	14,043	193
HUMBOLDT	23,163	462	NEVADA	11,650	291
KERN	94,983	3,327	PLACER	31,383	952

Source: Program Monthly Report, For June 2015

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ESA – 2015 Saturation By County (2)

County	Estimated Eligible Households	Total Households Treated	County	Estimated Eligible Households	Total Households Treated
PLUMAS	3,752	23	SIERRA	315	-
SACRAMENTO	176,659	4,134	SISKIYOU	21	-
SAN BENITO	6,577	180	SOLANO	45,396	1,818
SAN BERNARDINO	397	18	SONOMA	56,247	1,412
SAN FRANCISCO	115,473	1,649	STANISLAUS	66,207	1,398
SAN JOAQUIN	93,519	3,567	SUTTER	14,436	344
SAN LUIS OBISPO	34,552	540	TEHAMA	10,912	415
SAN MATEO	57,706	583	TRINITY	434	8
SANTA BARBARA	20,498	619	TULARE	9,293	485
SANTA CLARA	149,163	3,736	TUOLUMNE	9,806	69
SANTA CRUZ	29,595	852	YOLO	28,347	404
SHASTA	27,592	902	YUBA	11,133	418

Source: Program Monthly Report, For June 2015

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ESA – Market Barriers

General CARE and ESA Barriers

Some of PG&E's customers have expressed that they are:

- Overwhelmed with financial troubles
- Unaware of the breadth of program benefits and valuable enough to pursue.
- Unclear about program eligibility and recertification criteria.
- Suspicious of motives and fear information will be shared

ESA Barriers to participation include*:

- Not wanting contractors in the home,
- Not trusting the contractor or PG&E
- Needing to obtain landlord waivers to participate
- Withdrawing interest (not available for appointments or no longer interested)
- Unwilling to participate

**Source: Low Income Needs Assessment*

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CARE & ESA – Ethnic Media

PG&E has continued emphasis on overcoming language and cultural barriers through use of ethnic media.

During 2014, PG&E has participated in:

- Media interviews with ten different ethnic radio and TV media outlets.
- Media event in Kern County, showcasing an ESA participant's home with coverage on KKEY-TV (Telemundo), Azteca Bakersfield, and El Popular Newspaper.
- Digital advertising with special focus on Spanish- and Chinese-speaking audiences
- Social media channels in Spanish on PG&E's Facebook page and in Chinese on PG&E's Twitter handle.
- Events with Hispanic and Chinese community, including the Autumn Moon Festival, Fiestas Patrias Celebration, Dragon Boat Festival, and Festival de Sol.

Source: Program Annual Report, For Program Year 2014

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