



# LIQB MEETING FEBRUARY 19, 2015

2015 – 2017 Low Income  
Programs Application Review



# Introduction / Program Background

❖ **Decision 14-08-030:** Established conditions for proposing 2015 – 2017 CARE & ESA Programs.



## CARE Program

- Provides a bill discount to eligible customers at their primary residence.
- Customers, approved within 90 days of starting new gas service, may also receive a \$15 discount on their Service Establishment Charge.
- Customers may apply online, using traditional printed forms, or through CARE Clerks by phone.



## ESA Program

- Offers no-cost energy-saving home improvements for qualified renters and homeowners.
- Services provided by ESA Program contractors operating in customer's area.
- Customers may contact SoCalGas by phone or online; enrolled through marketing and outreach and contractor network.



## Program Eligibility

- Determined based on:
  - Published income guidelines OR
  - Participation in another designated customer assistance program (categorical eligibility)

# CARE Program At A Glance

## Proposed 2015-2017 Budgets

Budget Category	2015	2016	2017
CARE Management Costs	\$8,523,913	\$9,846,021	\$9,600,835
Subsidies and Benefits	\$130,453,111	\$131,338,535	\$132,351,979
Total Program Costs	\$138,977,024	\$141,184,556	\$141,952,814

## Forecasted Enrollment

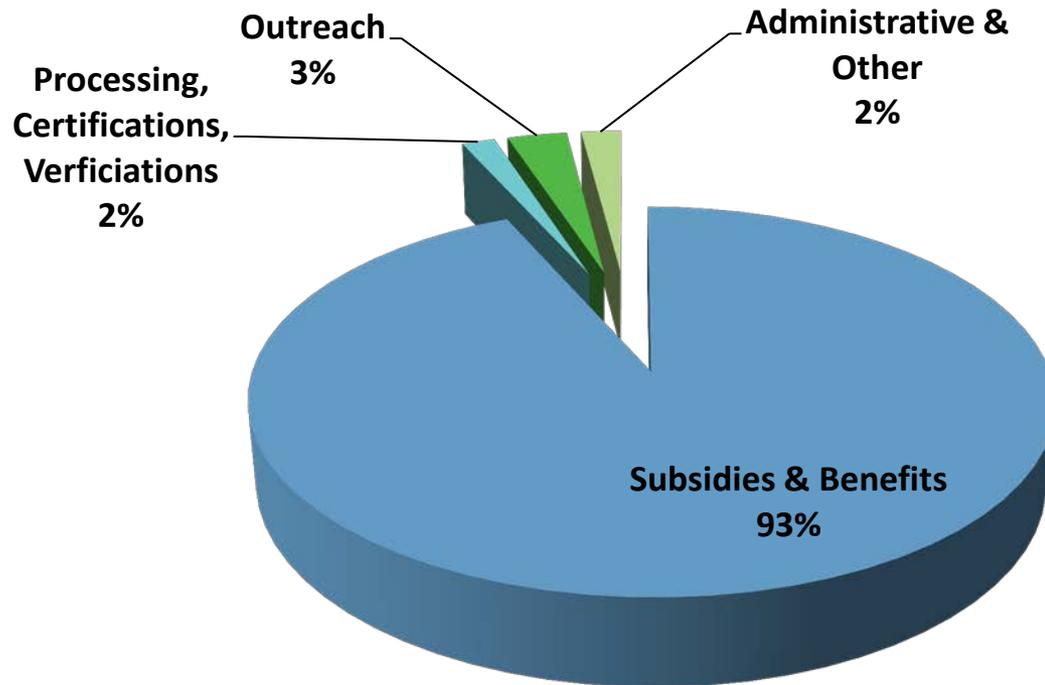
Program Activity	2015	2016	2017
Enrollment Increase	113,948*	17,071	17,242
Year-end Enrollments	1,707,088	1,724,159	1,741,401

\* Value shown for 2015 as projected in Application (A.) 14-11-011.

# Proposed CARE Program Budget by Category

*Over 93% of the proposed CARE budget is associated with bill assistance.*

## Proposed Annual CARE Program Budget 2015 – 2017



**Annual Average CARE Budget \$140.7 Million**

# CARE Best Practices Continued in 2015-2017

## Maintain Multiple Ways to Apply and Recertify

- Paper application, telephone, on-line, fax, data leveraging with other low income programs, rate-transfer when customers move, and through door-to-door canvassing representative.

## Ensure That Customers Are Aware of the CARE Program

- Bill messages, bill inserts, direct mailing, field personnel, CSRs, Public Affair managers, third party door-to-door canvassing, mass media, web campaigns, CBOs, community events.

## Different Reminders to Retain CARE Customers

- Bill messages, Out-bound dialing, and 2<sup>nd</sup> notification about recertification and verification.

## Efficient Probability Model Aids in Ensuring Only Eligible Customers Receive the Discount

- Fully Automated Processing of CARE Applications

# New CARE Program Strategies



**New Initiatives!!!**



**CSR Customer Enrollments**



**Enhance PEV  
Communications to Increase  
Response rate**



**Enhance CARE Forms for  
Operation Efficiency**



**Enhance and Streamline Web  
Enrollment**



**Mobile Responsive CARE  
Application and Webpage**

# ESA Program At A Glance

## Historical and Proposed Budgets and Goals

Year	Homes * Treated Goal	Actual	Budget *	Actual
2012	136,836	96,893	\$127 mil.	\$82 mil.
2013	136,836	106,948	\$130 mil.	\$98 mil.
2014	136,836	82,928 **	\$132 mil.	\$94 mil.
2015	110,000		\$119 mil.	
2016	110,000		\$127 mil.	
2017	110,000		\$129 mil.	

## Proposed Portfolio Cost Effectiveness

Year	ESACET	Resource Measure TRC
2015	0.86	0.52
2016 - 2017	1.08	0.67

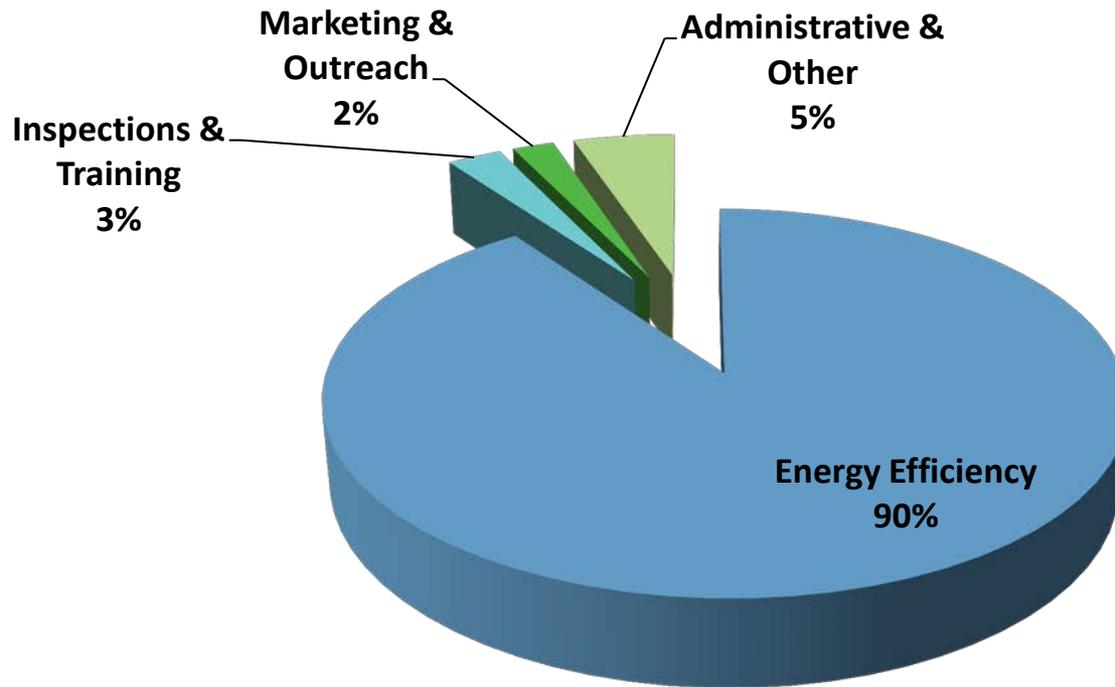
\* Years 2012 – 2014 = authorized levels. Years 2015 – 2017 = proposed levels.

\*\* Value for 2014 is preliminary year-to-date information; additional homes treated in 2014 will be reflected in annual report submitted in May, 2015.

# Proposed ESA Program Budget by Category

*Approximately 90% of the ESA budget is associated with energy efficiency activities.*

**Proposed ESA Program Budget 2015**

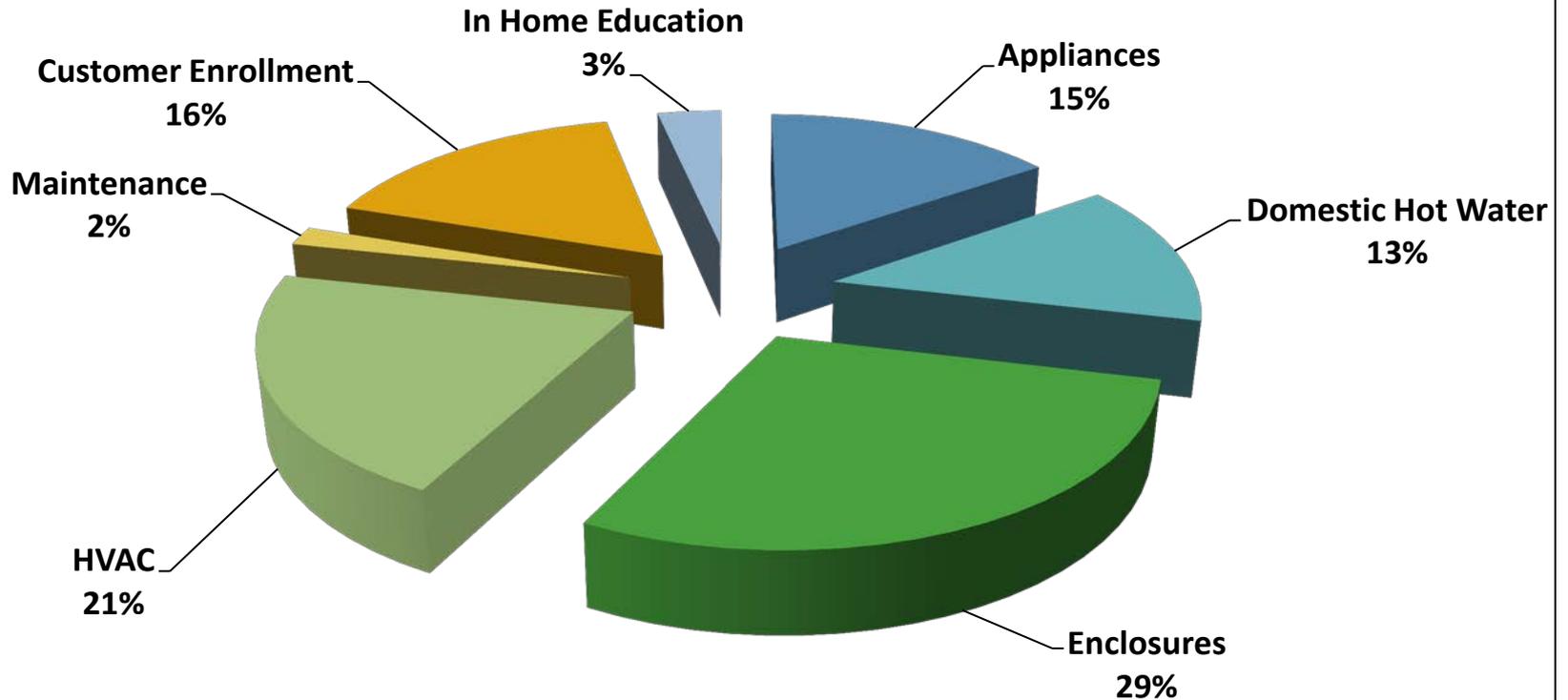


**2015 ESA Budget \$119.3 Million**

# Proposed ESA Program Budget Detail

## *Energy Efficiency Activities*

### Proposed Budget for 2015 Program Year



**2015 ESA Energy Efficiency Activities Budget = \$107.6 Million**

# ESA Program New / Retired Measures

## Thermostatic Tub Spout

- 533 MTh annual energy savings potential
- Complementary to Thermostatic Shower Valve measure for tub/shower combination units



## High Efficiency Forced Air Unit

- On burnout in lieu of 80 Annual Fuel Utilization Efficiency replacement
- Early replacement for certain high energy burden cases



## Minor Furnace Repair for Renters

- Currently unable to address furnaces that need minor repair for renters



## Retire non-code duct test/seal

- Very low cost effectiveness



# Proposed ESA Program Evolution Highlights

**A.** 493,000 willing customers remaining to be treated in 2015-2020

- LINA Study unwillingness ~ 24%

**B.** Reinststitute the 10-Year Go-Back Rule

- Energy education + in-home assessment for measures

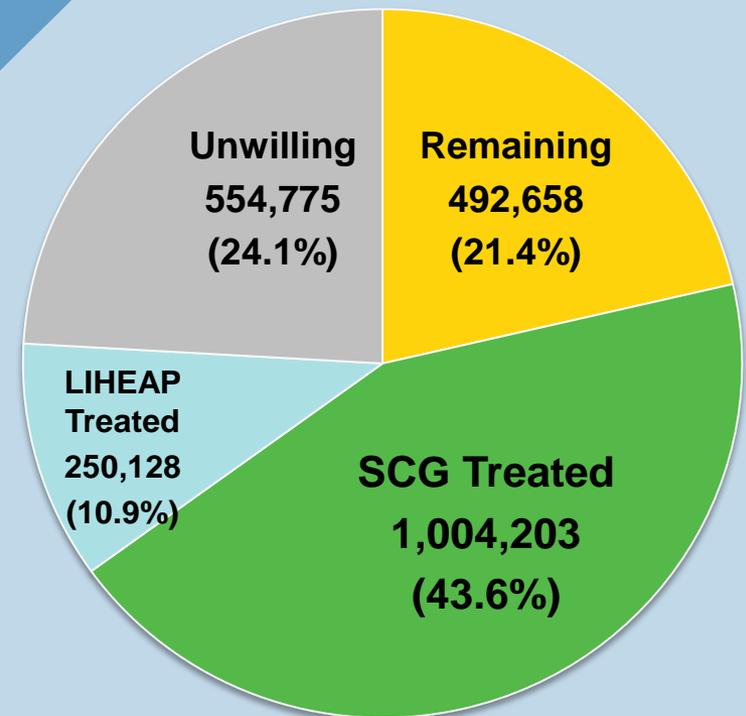
**C.** Modification of 3 Measure Minimum (3MM)

- SCG / SCE Coordination

**D.** Provide Energy Education for All Income Eligible Customers

- Customer receives education even if dwelling does not meet 3MM requirement

**Eligible Population  
Estimated 2.3 million**



# Water-Energy Measures / Drought Programs



## Existing Water Measures

- 1.2 million gallons of water saved in 2013 through HE Washer, TSV, aerator, showerhead
- TSV introduced in 2012 saved 53k gallons in 2013

## Water incorporation to Energy Education

- Shower timer
- Water content on En.Ed. wheel as well as OS messaging
- Toilet tank efficiency proposal

## Tub Spout proposal

- Complementary measure to TSV for tub/shower combinations
- 4K gallons saved per unit

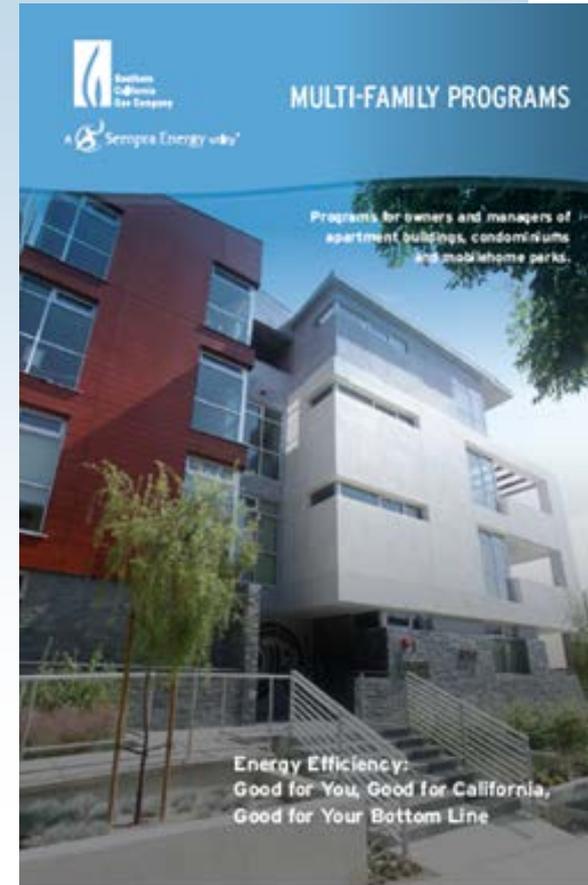
# ESA Program Multifamily Segment Proposals

## Targeting Enrollments and Streamlining Participation

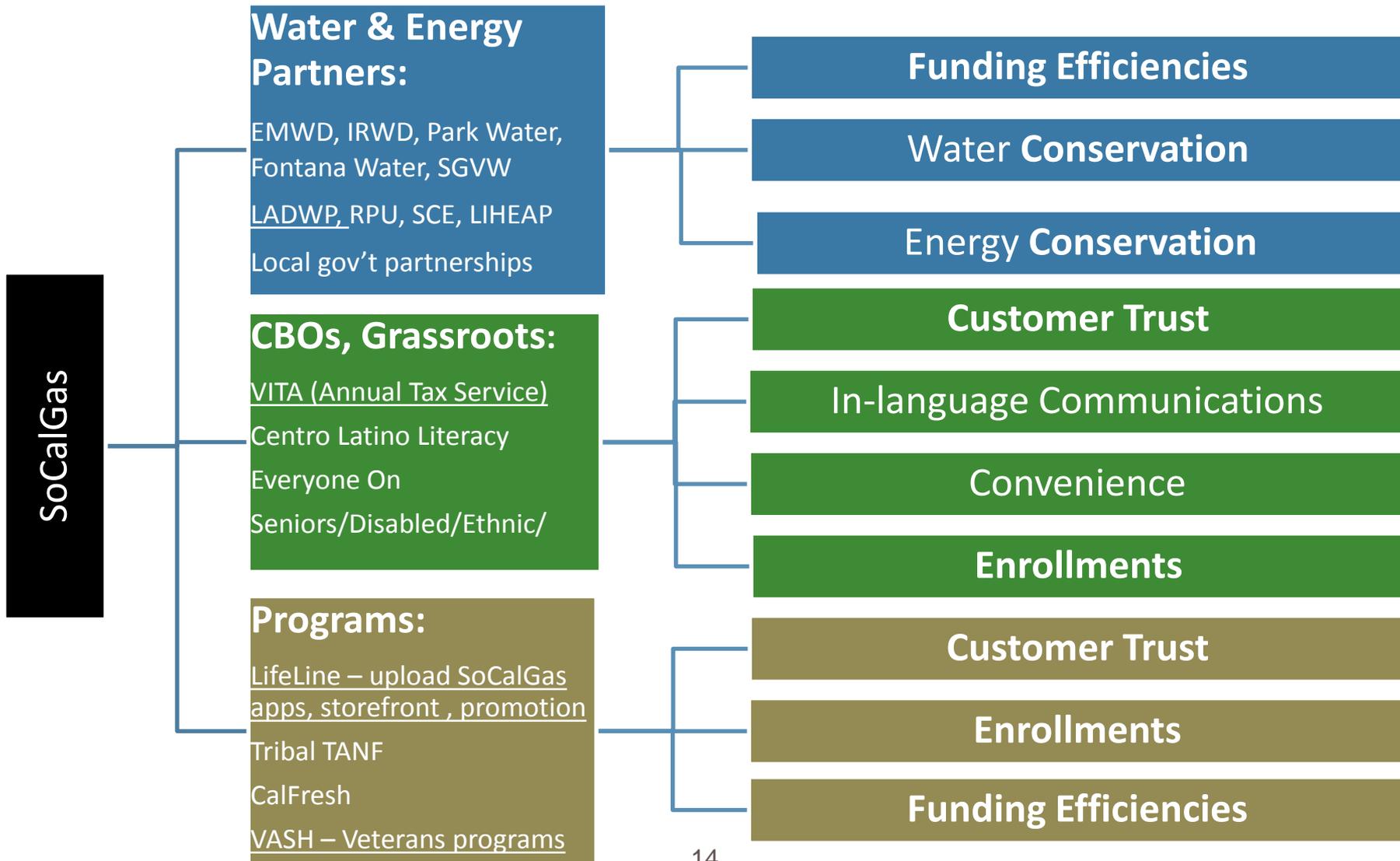
- Building-wide income verification via affidavit
- Targeted outreach to property owners
- Single Point of Contact (SPOC) expansion
  - S.P.O.C. can navigate utility portfolio of programs including common area programs and certain external programs.

## Increase CARE and ESA Program Awareness through Multifamily Marketing & Outreach

- Multi-program multifamily collateral
- Participation in housing forums, events, workshops
- Advertising in apartment owner publications
- Postcards for renters



# Leveraging and Marketing Coordination (Lifeline, Tribes, Local Gov't, CBOs, others)



# Hard-to-Reach Customers

- **Rural**
  - CBOs/Grassroots
- **Undocumented**
  - Segment study
  - Potential revised communications
- **Seniors and Persons with Disabilities**
- **Limited English and Limited Literacy**
  - CBOs/Grassroots - Centro Latino Literacy
  - Ethnic media
  - CARE CSR Enrollments

