

**EIGHTEENTH ANNUAL PROGRESS REPORT TO
THE
CALIFORNIA PUBLIC UTILITIES COMMISSION
CALIFORNIA ALTERNATE RATES FOR ENERGY
(CARE)**

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CALIFORNIA ALTERNATE RATES FOR ENERGY (CARE)

CARE Residential Program

This section describes individual and sub-metered participants (tenants of qualifying master-meter customers) for the 2006 program reporting period.

I. PARTICIPANT INFORMATION

A. Provide the total number of residential CARE customers, including sub-metered tenants, by month, by energy source, for the reporting period.

See Table 1, and Tables 2.1, 2.2, and 2.3.

1. Explain any monthly variance of 5% or more in the number of participants.

During the 2006 program year, no variances of 5% or more occurred.

B. Describe the methodology, sources of data, and key computations used to estimate the utility's CARE penetration rates by energy source.

1. Describe how the estimates of current demographic CARE-eligibility rates, by energy source for the pre-June 1st periods, were derived.

For the 2006 program year reporting period, PG&E continued to use the Joint Utilities' methodology for calculating demographic CARE-eligibility rates that were adopted in Decision (D.) 01-03-028. The particulars of the calculations may be found in Attachment A, "Technical Addendum: Joint-Utility Methodology for Calculating CARE Penetration" excerpted from the Joint Utilities' "Reporting Requirements Manual (RRM) Working Group Report for Low Income Assistance Programs" (R.98-07-037).¹ In summary, PG&E applies county-based, commodity-specific demographic eligibility multipliers to the technically eligible meter count within that county. The product of this calculation is then added together to obtain an overall eligibility for each commodity served.

2. Describe how the estimates of current CARE-eligible meters were derived. Explain how total residential meters were adjusted to reflect CARE-eligible meters (i.e., master meters that are not sub-metered or other residential meter configurations that do not provide residential service.)

PG&E obtains a count of technically eligible meters by county and commodity. Within each commodity, there are only certain eligible rate schedules authorized to participate in CARE. Customers who are ineligible for CARE are removed from the pool of technically eligible meters. For each

¹ The Joint Utilities are PG&E, Southern California Edison Company, San Diego Gas and Electric Company and Southern California Gas Company. Energy Division and the Division of Ratepayer Advocates also participate in the RRM Working Group.

county, the result of this filtering process provides the total technically eligible meter count to which demographic eligibility multipliers may then be applied.

3. *Discuss how the estimates of current CARE-eligible households were developed.*

The demographically eligible households were calculated for each utility by applying the demographic eligibility rate to technically eligible households by county and utility service area. The methodology is described in the Low Income Reporting Requirements Manual. These rates were developed by Athens Research and utilize current year income and household size data. The 2006 penetration rates reported in monthly reports used demographic eligibility rates that were submitted to the California Public Utilities Commission (Commission) on October 14, 2005.

D.05-10-044 mandated that eligibility criteria for CARE and Low Income Energy Efficiency (LIEE) be changed from 175% of Federal Poverty Guidelines (FPG) (and 200% for LIEE seniors and disabled) to 200% of FPG for all residential customers. This became effective immediately. The same eligibility criteria (200% FPG) were in effect throughout 2006.

PG&E applied the demographically eligible meter count supplied by the Joint Utility demographer to internally derive the technically eligible meter count by county and commodity. To derive the demographic information, the Joint Utilities hired a demographic consultant, Athens Research, who culled information starting with the current census tract data available for the service area. Additionally, commercially available demographic updates were utilized to update the population information for the current year. The Joint Utility demographer then developed matrices, applying appropriate statistical methods in order to properly represent the information by county and commodity. The raw percentages of estimated eligible population, by county and commodity, were then provided to PG&E for combination with technically eligible meter counts. The product of these statistics results in PG&E's estimated eligible population.

Attachments A and B describe the Joint Utility methodology for calculating CARE penetration (filed in February 2002 for the Workshop on Penetration Rates for CARE and ULTS Programs) and the Joint Utility CARE eligibility update (filed on October 15, 2004 and updated December 28, 2004 in compliance with the directives of Interim D.02-07-033, Ordering Paragraph 4(b), as modified by the Assigned Commissioner's Ruling (ACR) of December 27, 2002 and the Scoping Memorandum of June 24, 2004).

4. *Describe how current CARE customers were counted.*

PG&E surveys its billing system on a monthly basis for all customer accounts on a monthly basis, filtering all non-CARE rates from the pool. The results are a listing, by commodity, of all participating CARE accounts.

In the case of sub-metered tenants receiving CARE discounts from their master-metered facilities, PG&E maintains a separate database of all participating tenants. This database is surveyed monthly and a specific count of all participants is derived.

5. *Discuss how the elements above were used to derive the utility's CARE participation rates by energy source.*

The participation rate by energy source is the total number of participating CARE customers by commodity divided by the estimated technically eligible CARE population by commodity.

- C. *Provide the total number of CARE residential customers, CARE-eligible households, and CARE participation rates, by energy source, by quarter. See Tables 2 through 2.4. Gas or electric (single-commodity) utilities will use the format shown in Table 2. Gas and electric (dual-commodity) utilities may use Tables 2.1 through 2.4 in lieu of Table 2.***

See Tables 2.1 through 2.4.

- D. *Provide the estimates of current demographic CARE-eligibility rates by energy source at year-end.***

Electric-only estimated eligible:	435,236
Gas-only estimated eligible:	263,787
Combined electric/gas estimated eligible:	<u>837,122</u>
 Total CARE eligibility:	 1,536,146

All CARE eligibility estimates are based on 200% of the Federal Poverty Level.

- E. *Provide the estimates of current CARE-eligible sub-metered tenants of master-meter customers by energy source at year-end.***

Applying current eligibility estimates for the general population (28.69% electric, 27.89% gas), 29,911 electric and 23,310 gas sub-metered tenants are estimated to be eligible for CARE.

- F. *Provide the current CARE sub-metered tenant counts by energy source at year-end.***

22,707 electric and 20,901 gas sub-metered tenants were receiving a CARE discount by year-end.

G. Provide the current CARE sub-metered penetration rates by energy source at year-end.

As of year-end 2006, 76% of the estimated CARE-eligible sub-metered electric tenants and 90% of the estimated CARE-eligible sub-metered gas tenants were enrolled in for CARE.

H. Discuss any problems encountered during the reporting period administering the CARE program for sub-metered tenants and/or master-meter customers.

During the 2006 program year, PG&E continued its year-round recertification schedule for sub-metered tenants. One issue that continued to be a problem was insufficient discount information provided on the tenant's bill from the facility manager's billing agency. For example, the sub-metered facility may not display the CARE discount as a separate line item, making it difficult for the tenant to verify that they were receiving their CARE discount. When a tenant calls PG&E with questions, a CARE processor reviews their application for certification verification.

If the tenant continues to question their bill, PG&E recommends that the tenant speak with their billing agency and/or their sub-metered facility manager for further clarification. If the tenant does not find resolution with their billing agency and/or sub-metered facility manager, then PG&E advises the tenant to contact the Commission.

Another issue was that some managers were concerned that their tenants who were enrolled in the CARE program used more energy than the average tenant in the building. This resulted in the master-metered customer having to give the tenant more of a discount than was originally allotted by PG&E. Currently, if the customer--the sub-metered manager--is not satisfied, PG&E advises the customer to contact the Commission.

II. USAGE AND BILL INFORMATION

A. Provide a comparison of CARE and non-CARE residential usage by tier (Baseline and Non-Baseline), excluding usage of residential master-meter customers, by energy source.

See Table 3.

B. Provide a comparison of the average monthly bill for CARE and non-CARE residential customers, excluding bills of master-meter residential customers, by energy source.

See Table 4.

III. PROGRAM COSTS

A. Discount Cost

1. State the average monthly CARE discount received, in dollars, per CARE customer by energy source.

Electric: \$32.80

Gas: \$8.62

2. State the annual subsidy (discount) for all CARE customers by energy source.

Electric: \$370,738,886

Gas: \$87,638,650

Total: \$458,377,536

B. Administrative Cost

1. Show the CARE Residential Program's administrative cost by category.
See Table 5, Standardized CARE Administrative Cost Reporting Categories.
2. Explain what is included in each administrative cost category.

Outreach:

This category includes bill inserts, advertising, applications (printing and mailing), posters, brochures, flyers, postage, sub-metered outreach, information technology (technical support and software licensing), staff labor, outbound dialing, toll-free line, event staffing, capitation fees, other outreach and mass media outreach.

Automatic Enrollment:

Costs associated with this category include staff labor and information technology for automatically enrolling customer lists from other agencies or utilities.

Processing, Certification and Verification:

Costs associated with this category include staff labor, information technology (technical support and software licensing), application processing, training, programming labor, and sub-meter certification.

Information Technology / Programming:

Manual rebilling, programming and billing labor

Measurement & Evaluation:

Needs assessment study and customer satisfaction survey

Regulatory Compliance:

This category includes program applications, advice filings, comments and reply comments, hearings, reports and studies, working group meetings, public input meetings, and tariff revisions.

General Administration:

Office supplies, market research, program management labor, and information technology (technical support and software licensing)

LIOB Funding:

Low Income Oversight Board Funding: Both past and present funding as invoices are received.

Energy Division Staff Funding:

Both past and present funding as invoices are received.

C. Provide the year-end December 31 balance for the CARE balancing account.

The year-end December 31, 2006 balance for the CARE balancing account (electric and gas) was a net credit balance of \$13,447,201.

D. Describe which cost categories are recorded to the CARE balancing account and which are included in base rates.

D.02-09-021 authorized recording all CARE administrative costs as well as the revenue shortfall associated with the CARE discount in the CARE balancing account.

E. Provide a table showing, by customer class, the CARE surcharge paid, the average bill paid, the percentage of CARE surcharge paid relative to the average bill, the total CARE surcharge collected, and the percentage of total CARE revenues paid.

See Tables 6a and 6b.

IV. OUTREACH

A. Discuss utility outreach activities and those undertaken by third parties on the utility's behalf.

Beginning in 2001, PG&E clearly defined its CARE-eligible households so that it could develop a targeted outreach and education plan. PG&E learned that CARE-eligible customers fall into the following demographic groups:

1. 97% of all eligible customers speak one of five languages at home: English, Spanish, Cantonese, Mandarin or Vietnamese. 43% are Spanish-dominant.

2. CARE-eligible households are predominantly ethnic minorities. These include a mix of seniors, rural residents, agricultural farm workers and residents of sub-metered tenant facilities.
3. While the male head of household is often the customer of record, the female head of household usually makes energy and spending decisions and takes action on important issues.

Because of the tremendous geographic and ethnic diversity of the target community, PG&E realized its CARE enrollment would be greatly enhanced by launching an integrated communications and outreach effort. PG&E developed and implemented a CARE Outreach and Education Campaign in 2001-2002. PG&E has continued and expanded this campaign since its initiation, using the following approaches in 2006:

1. A marketing program that included direct mail projects, educational materials, enrollment events and local media outreach focusing on previously underrepresented target areas within PG&E's service area;
2. A capitation fee program to support the participation of grassroots organizations such as Community Outreach Contractors (COCs); and
3. A program of grassroots paid media placements targeting low- and fixed-income households.

2006 CARE Outreach Campaign Activity Highlights

The successful 2006 CARE outreach campaign included community outreach, grassroots media, direct mail and partnerships with government agencies, COCs and faith-based organizations (FBOs). Successful relationships with all of these organizations greatly assisted in the enrollment of CARE-eligible but non-enrolled customers.

The campaign also included key media, retail companies, charitable organizations and government agencies serving targeted counties and communities.

Direct mail remained one of the primary means of reaching the target audience. This method allowed PG&E's CARE group to contact customers in their own homes and languages, thus removing a key barrier to communication. The direct mail campaign was highly effective in targeting the audience and reducing costs by communicating only with eligible customers.

Listed below are the highlights of the 2006 CARE program Outreach Campaign.

African American Program

African American individuals are more likely to be reached through media, restaurants, stores, recreational centers and places of worship that specifically serve them.

In 2004, a partnership with the Ninth District, Northern California Region of the Christian Methodist Episcopal Church (CME) was established. PG&E continued ties with the presiding prelate of the Ninth District and his administrative staff who have the infrastructure to distribute CARE applications to income-eligible African American customers. This successful partnership was duplicated in 2005 with the Fifth District, Northern California Conference of the African Methodist Episcopal Church (AME). In 2006, the relationship with AME and CME was nurtured and expanded, which led to an increased number of completed CARE applications by eligible African American customers. PG&E built upon the awareness created in the previous years by establishing CARE coordinators to broaden the number of CARE advocates within the CME Northern California Alliance of ministers. CARE also built awareness by participating in events organized by PG&E for faith-based leaders. This awareness enabled participation among other church denominations to increase the number of CARE applications that are distributed and completed.

PG&E partnered with Smart and Final, a wholesale retailer, to distribute CARE applications at over 40 locations throughout PG&E's service area. This initiative was supported by public service announcements and on-air interviews on 98.1 KiSS FM and 102.9 KBLX FM radio stations. A partnership with Bay Area

Rapid Transit (BART) was established and applications were distributed during a community-based initiative named "Operation One Warm Coat," which was held at various BART stations during the winter season. The purpose of this initiative was to collect coats for needy families and promote the CARE program.

PG&E participated in a variety of African American events which made it possible to distribute applications and collateral materials directly to members of the targeted audience. These events included Drum Major for Justice, Sacramento Black Expo, Chabot Flea Market, Oakland Westlake YMCA Kids Day, SF Hunters Point Stone Soul Picnic, Fresno Black Expo, Fresno Block Party, Summer Jam, Juneteenth, Big Brothers and Sisters, Oakland Black Expo, Berkeley Jazz Festival, Urban Fest, SF Basketball Tournament Hoop There It Is and the 19th Annual NAACP Convention.

Targeted media relations were an essential part of the African American program to cultivate opportunities that would lead to an increased number of completed applications. CARE information and an application were printed in the Sacramento Observer. News releases were distributed and placements were secured through radio stations and newspapers.

Hispanic Program

As the Hispanic community represents the largest CARE-eligible segment of PG&E's customer base, PG&E's outreach campaign to external agencies developed a targeted program to meet the unique needs of the community. CARE was supported and mentioned by Hispanic television stations, which are heavily watched by the target audiences. Community outreach was also a key to the campaign

An English/Spanish CARE direct mail piece was created to increase enrollments and communicate information about the program to eligible but un-enrolled households in Hispanic low-income areas. Target households were chosen based on a purchased list which was merged with PG&E's customer information system.

An English/Spanish door hanger application was distributed in the top 10 target counties to assist in increasing enrollment. Door-to-door delivery of the door hanger is an effective way of reaching eligible customers in their homes. The door hangers were delivered to prospective households using zip code analysis.

PG&E participated in a variety of Hispanic events, which made it possible to distribute applications and collateral materials directly to members of the target audience. These events included Caracen Dental Clinic, Mariachi Festival, Mexican Heritage Festival, Cesar Chavez Celebration, Contact for Five, Festival de la Familia, Cinco de Mayo, Mission Neighborhood Event, Iglesia Adventista del Septimo Dia, Viva Mexico, Mariachi Festival, Migrant Conference and the Mission YMCA.

Native American Program

The Native American community tends to be a harder to reach segment of PG&E's customer base. PG&E's external outreach agencies developed a targeted program to meet the unique needs of this community.

A CARE direct mail piece containing images of Native American families was created to increase enrollments. The mail piece provided information about the program to eligible but un-enrolled households in low-income areas. Target households were chosen based on a purchased list which was merged with PG&E's customer information system.

Native American kits were created and distributed reservations with low-income customers to assist in increasing enrollment. The kits included an application and were made available to Native Americans at common areas within the reservation. The colors chosen for the kit did not represent any specific tribe's affiliation but a generic blend of colors.

PG&E participated in a variety of Native American events which made it possible to distribute applications and collateral materials directly to members of the target audience. These events included Palo Alto Native American Powwow, Livermore Indian Celebration, Powwow for Women's Health and Native American Heritage Day.

Asian American Program

The Asian American community is extremely diverse, with many distinct groups comprising the Asian American population. Therefore, primary and secondary target markets were identified based on population size, income levels and in-language preference. PG&E's CARE group developed several programs throughout the campaign to reach these markets. The Chinese and Vietnamese communities were established as the primary target markets. The Korean, Cambodian, Lao, Hmong, Mien and Filipino communities were established as secondary target markets. Senior citizens also were targeted within these communities.

In-language prompts were featured on the CARE toll-free line for Cantonese, Mandarin and Vietnamese callers. Collateral materials in several languages were distributed through COCs and other channels.

PG&E participated in a variety of Asian events which made it possible to distribute applications and collateral materials directly to members of the target audience. These events included Vietnamese Tet Festival, Vietnamese Spring Festival and Parade, Chinese New Year, SF Lunar New Year, Manilatown, World Journal, Pista Sa Nayon, Korean Senior Center, Chinese Night Market, Southeast Asian Leadership, Oakland Chinese Street Fair, Empress of China, Autumn Moon Festival, Learning to Live in America and the Dragon Boat Race.

CARE booths were set up and CARE applications and collateral materials were distributed to attendees.

Partnerships with key Asian Pacific Islander (API) organizations proved effective in reaching out to these low-income community members because these organizations serve as their home away from home.

The CARE program implemented a direct mail piece that went to eligible Chinese customers' homes, thereby reducing barriers of accessibility to enrollment information. PG&E worked with a database vendor to develop a list of prospective Chinese CARE enrollees throughout the service area. PG&E merged its customer information system with the purchased list. As a result, current Chinese CARE-enrolled customers were removed from the mail file thus reducing duplication rates.

Targeted media relations were also an essential part of the Asian American program. Radio commercials in Chinese and Vietnamese aired on 94.1 FM KVTO and 1430 AM KVVN throughout the San Francisco Bay Area.

Bill Inserts

A bill insert consisting of a mini CARE application was issued in the March and June billing cycles. It included postage-paid return mailing and was in multiple languages. The bill insert presented CARE information in a concise way and allowed the customer to fill out a condensed version of the application. The bill insert in March was in English and Spanish. The June bill insert was in English and Vietnamese. This initiative was an efficient outreach tool because of its ability to reach every residential PG&E customer who is not already on CARE.

Business Partners

A Business Partners campaign continued with the involvement of organizations and businesses in enrolling potential CARE customers. These partners were selected because they primarily cater to low-income clientele. The object of the campaign was to reach these customers both at the mainstream and grassroots levels, ensuring numerous touch points with potential CARE enrollees.

PG&E contacted all businesses and organizations that participated in the business partnership in 2005. A total of 77 partners were secured in the top 10 counties in PG&E's service area including retail stores, ethnic restaurants, hospitals, charitable organizations, banks, pharmacies, bookstores and cash advance locations throughout Northern California. Applications and collateral materials, such as CARE brochures and brochure holders, were mailed to these organizations for display.

Community Outreach Contractors (COCs)

The CARE team recruited and contracted with a diverse group of community-based organizations already recognized and trusted by their constituents. More than 75 organizations representing a wide array of communities (e.g., Native American, seniors, disabled, Hispanic, and Lao) signed on to promote CARE throughout 2006. These COCs were trained to educate consumers about CARE in their own languages. Some COCs also supported other PG&E low-income energy programs.

All COCs underwent a training course and were provided with collateral materials, such as bilingual CARE posters and brochures, to display in their organizations and at outreach events. CARE utilized a special COC toll-free telephone and fax line exclusively to handle questions and offer support. CARE also supported the COCs through a variety of other channels including a monthly newsletter, an enrollment tips booklet, an e-mail address, quarterly regional meetings, site visits, training sessions and community enrollment events.

A mid-year incentive was offered as a token of appreciation for any COC who completed 50% of their stated goal by the middle of the year. CARE also hosted the Fifth Annual CARE Community Outreach Contractor Awards and Recognition Luncheon in appreciation of the COCs' efforts. Every organization received a certificate of appreciation and several organizations were individually recognized for their enrollment efforts and overall contributions to the campaign. CARE continued the effort to expand the number of community outreach contractors and aims to have 100 COCs onboard in 2007. This effort includes a partnership with the Neighborhood Payment Center Team which is currently in the process of recruiting organizations to become payment centers. On multiple occasions, Neighborhood Payment Centers were used to help present CARE to interested parties.

Direct Mail

As PG&E's CARE outreach campaign matures and continues to successfully enroll eligible customers, the challenge of reaching and enrolling those customers becomes even more evident. To this end, CARE employed direct mail advertisements. These advertisements went to eligible customers' homes, thereby reducing barriers of accessibility to enrollment information. Current CARE-enrolled customers were removed from the mail files thus lowering duplication rates. CARE orchestrated the following direct mail projects:

- Piggybank direct mail – PG&E purchased a list comprised of prospective customers who are not already in the program. A colorful and eye-catching direct mail piece was distributed throughout the top 10 target counties within PG&E's service area. The piggybank design on the front page of the piece represented the potential savings of being on CARE.
- Cordaptix direct mail – PG&E utilized data from its customer information system to send a direct mail piece to prospective customers. The customer data retrieved included those customers who are on medical baseline or life

support and were not already on the CARE program. Also included were customers who had received a 48-hour notice or had been required to submit a credit deposit. This was a successful mailing generating high levels of customer response. This initiative proved to be cost-effective due to the savings obtained by utilizing data that was already available.

- Admail West direct mail – A targeted list of customers was purchased containing information specific to CARE criteria. These criteria included income levels, household size and geographic location. The list was merged with PG&E's customer information system to exclude current CARE customers. An informative letter with an application was mailed directly to the customers' homes.
- Chinese direct mail – PG&E worked with a database vendor to develop a list of prospective Chinese CARE enrollees in Alameda, Sacramento, San Joaquin, Contra Costa, San Francisco, Sonoma, Fresno, Stanislaus, Kern, Santa Barbara, San Luis Obispo and Santa Clara counties. All of these counties have a significant number of Chinese residents. Using income as a parameter (\$30,000/household/year), information from PG&E's customer information system was merged with the purchased list.
- Pennysaver direct mail – PG&E purchased ad space in the Pennysaver direct mail coupon book. Pennysaver has an established distribution channel which is segmented by various criteria. Pennysaver directly targets PG&E customers across the service area by income and number of households. Pennysaver reaches over a million customers weekly. A cut-out application was printed in the book, and a mini application was also periodically inserted.
- Re-certification direct mail – CARE developed a list of previous CARE customers who had failed to re-certify in the past year. A letter and application were sent to these customers, asking them to reapply for the program if they still qualified.
- Door Hanger direct mail – A customer list determined by household income was purchased by PG&E. An informative letter and a door hanger application were then mailed to this targeted audience.
- Name Finders direct mail – Targeted lists of customers were purchased containing information specific to CARE criteria. These criteria included income levels, household size and geographic location. The list was merged with PG&E's customer information system to exclude current CARE customers. An informative letter with an application was mailed directly to the customers' homes. Mailings were sent to three separate audiences: the general market, the Hispanic market and the Vietnamese market.
- Nonprofit direct mail – A targeted list of nonprofit organizations was purchased containing information specific to CARE criteria. This list was merged with PG&E's nonprofit database to exclude all organizations

currently enrolled in CARE. An informative letter with an application was mailed directly to non-enrolled organizations.

- **Welcome Packets** – CARE coordinates with its Customer Service Department to insert a mini application into the welcome packets which are distributed to all new PG&E customers. This has proven to be a highly effective method of not only educating new customers about CARE but also about other free services provided.
- **Previously Over Income (POI) direct mail** - As a result of the natural gas increase during the 2005-2006 winter season and the CARE income guideline increase, more customers became eligible for the program. CARE sent a direct mail piece to all customers who were previously above the income guidelines or on the FERA program.
- **Hispanic direct mail** – An English/Spanish direct mail piece was created to increase enrollment within the Hispanic community. The direct mail piece provided information to eligible but un-enrolled households in Hispanic low-income areas. Target households were chosen based on a purchased list which was merged with PG&E's customer information system.
- **Winter Initiative Program direct mail** – To assist customers during the 2006-2007 winter season, PG&E mailed a packet to all residential households providing detailed information about various ways to economize energy and save money. English/Spanish CARE applications were inserted into packets that were mailed to non-CARE customers.

Employee Involvement

Employee involvement was a significant outreach method utilized by the CARE program. Throughout June, CARE executed a variety of activities that served to increase awareness and boost employee involvement in enrolling eligible customers. The CARE team asked employees to pass on an application to a friend or family member who may be eligible for the program. Applications were inserted into all employee paychecks. CARE representatives distributed applications in the lobby of PG&E headquarters for one hour daily throughout the month. Employee Involvement Month was featured in PG&E's internal newsletter generating additional awareness for the campaign. PG&E employees have become dedicated advocates of the CARE program as a result of this initiative.

Enrollment Events

One of the most effective ways to break down barriers, engage community leaders and build trust in communities is through community events. The CARE Team participated in 184 multicultural events bringing a face and personality to the CARE program. These events provided an opportunity for the CARE staff to distribute collateral materials and hold face-to-face conversations with customers. In many cases, staff members aided customers in completing applications on site. These events allowed CARE to partner with community

outreach contractors to rally further support for the program. CARE also utilized events as opportunities to meet and network with organizations with similar goals and needs.

Kiosk

Self-service drop-box kiosks have been operating in a number of PG&E local offices since 2004 and continue to be utilized to assist in generating new enrollments. Kiosks have become an extremely effective outreach tool. They include an application holder as well as a slot where the customer can deposit the completed application. Each kiosk comes with a lock and key in order to help maintain security and confidentiality. These kiosks allow customers to enroll themselves in CARE while waiting in line to pay their bills. Throughout the year, all local office kiosks were replaced with Americans with Disabilities Act (ADA) versions of the kiosk, which provide the disabled customer convenient access to applications.

Leveraging

CARE leveraged with its low-income sister programs, FERA and Energy Partners (PG&E's LIEE Program), in order to generate enrollments. A data exchange was conducted with Energy Partners to automatically enroll eligible customers into CARE. Customers that applied for FERA but qualified for CARE were also automatically enrolled.

Also, PG&E established a data exchange program with three of the other major California utility companies, Southern California Edison Company, Southern California Gas Company and Sacramento Municipal Utility District. By sharing customer data, PG&E was able to enroll qualified customers onto CARE and vice versa.

Media Relations

Media relations are an important component of any effective communications program. News media provide a vital channel to gauge public reaction, assess challenges and utilize "third-party" endorsements. When done in conjunction with grassroots paid media, special events, community outreach, bill inserts and other activities, targeted media relations noticeably enhance the impact of the overall campaign.

Media relations targeted sources including Hispanic, African American, and Asian Pacific Islander media, which promoted enrollment drives and announced new income guidelines. Public service announcements describing the CARE program aired on 102.9 KBLX and 98.1 KiSS FM, which primarily adhere to the African American population in the San Francisco Bay Area. Media coverage had a direct and measurable impact on customer calls to the CARE toll-free line.

Multicultural Collateral Materials

An assortment of collateral materials was produced and used to assist CARE partners in their grassroots education and outreach efforts. Colorful and eye-catching application brochures were printed and distributed to potential CARE customers. These brochures were bilingual and came in three versions: English/Spanish, English/Chinese and English/Vietnamese. The CARE program also used a bilingual door hanger application. Bilingual posters were distributed to various organizations and were a great tool to share information about the program. Banners were redesigned and personalized for each COC. Collateral material giveaway items such as pens, coin zip purses, sun block kits, eyeglass cleaning cloths and first aid kits were distributed to potential customers at multicultural events. All items contained the CARE tagline (“Save 20% on your PG&E bill”), a call to action and the CARE toll-free telephone number.

Multilingual Toll-Free Line

PG&E’s CARE campaign required a single tool that could effectively educate a diverse target audience and at the same time provide a measurement of the campaign’s effectiveness.

A dedicated toll-free line featuring recorded information about CARE achieved both these goals. The line was recorded in five languages: Cantonese, English, Mandarin, Spanish and Vietnamese, and was accessible 24 hours a day from anywhere in the PG&E service area.

The toll-free line (1-866-PGE-CARE) offered CARE customers answers to frequently asked questions, a list of referrals to local COCs, and an option of leaving questions or requesting a CARE application. In-language prompts also provided detailed information about monthly CARE enrollment events and re-certification procedures. All calls were monitored, tracked and analyzed as part of the ongoing effort to provide effective customer service.

Paid Media

PG&E has effectively and efficiently used local television and radio to reach large numbers of eligible customers because television and radio are the most consumed and trusted media for low income consumers. Grassroots paid media builds awareness quickly and enhances the effectiveness of other activities such as community outreach.

African American TV commercials were aired to assist in extending the CARE message to eligible customers who may have been missed through other efforts in the past. These commercials aired on CBS and UPN in the San Francisco-Oakland-San Jose markets. Commercials included a testimonial by a CARE customer who related her experiences with the program and by a PG&E employee who described the program. Radio commercials targeting the African American community were aired on 102.9 KBLX. Applications were printed in

the Sacramento Observer, which is primarily read by the African American community in the Sacramento area.

Radio commercials targeting the Asian community aired on 94.1 FM KVTO and 1430 AM KVVN radio in the San Francisco Bay Area. These commercials were in Cantonese and Vietnamese and featured PG&E employees describing the program.

Partnerships

A variety of partnerships was developed and nurtured throughout the year. These partnerships allowed PG&E to raise awareness of the program among the partnering organizations' clientele. This joint venture helped expand communication channels by utilizing information from the database of partnering organizations to communicate to potential CARE customers. CARE partnered with organizations such as the Department of Housing and Urban Development (HUD) to recruit public housing authorities and educate them about the CARE program. Working together with public housing authorities, CARE implemented a direct mail initiative targeting tenants of these housing authorities. This successful initiative not only generated new enrollments but heightened the interest of other public housing authorities in becoming advocates of the program.

PG&E also partnered with a variety of other public assistance organizations, such as the Special Supplemental Nutrition Program for Women, Infants and Children (WIC), health and human service organizations, food banks and the City and County of San Francisco Welfare Department. Applications were mailed to the key contacts at each of these organizations and were then distributed to their clientele.

Phone Enrollment

As a result of the natural gas increase during the 2005-2006 winter season, PG&E established a proactive phone campaign to enroll new customers. This campaign began on November 1, 2005 and lasted through April 30, 2006. It consisted of CARE representatives placing phone calls to customers who have previously requested an application which was never submitted. Eligible customers were enrolled by phone and were asked to mail in a completed application.

Public Affairs

Respected third parties throughout PG&E's service area agreed to endorse CARE. Opinion leaders from various communities who endorsed CARE included elected officials, school officials and religious leaders.

Re-certification Efforts

All customers are required to re-certify for CARE every two years except sub-metered customers who are required to re-certify every year. A re-certification reminder was posted on PG&E bills quarterly. A reminder letter was mailed to customers 30 days prior to the expiration of their CARE discount. An automated phone call served as another reminder to re-certify. These efforts allowed CARE to retain 80% of customers requiring re-certification.

Research

CARE strived to better understand the unique challenges and special needs of CARE customers. PG&E organized quarterly customer opinion surveys in order to assess overall satisfaction among these customers. The opinion survey was conducted in English, Spanish and Chinese via a series of questions over the phone.

Rural Outreach

Focused outreach was conducted in rural areas which have less access to distribution channels commonly found in urban areas. Several rural counties were identified based on their demographics. These included Butte, Placer, Mendocino, Calaveras, Lake, San Luis Obispo, Madera, Humboldt, Nevada and El Dorado Counties.

Based on external research, 100% of welfare recipients qualify for the CARE program. Our past experience shows that most people seeking aid go through at least one branch of the welfare system at some point. This outreach had two facets: mini applications were mailed to welfare clients and brochures were made available in welfare agency offices, giving clients many opportunities to apply.

PG&E reached out to low income families via interaction with their apartment managers. PG&E sent brochures to low income apartment managers and housing complex managers for distribution to their tenants. This initiative served to raise awareness and increase enrollment of eligible customers. In the process, beneficial relationships with apartment and housing complex managers were formed.

Through external research, PG&E found out that low to moderate income families are households where one or more adults work outside the home, primarily earning minimum wages. PG&E reached out to blue-collar workers via an avenue that exists within the context of their daily lives – their employer. Research was conducted to target and isolate employers of a primarily minimum wage workforce. Call lists were generated and calls were placed to set up participation and distribution. Brochures were mailed to each employer that met the target criteria for distribution to each minimum wage employee.

It was PG&E's goal to reach low income areas in several target rural counties. Through initial research, PG&E concluded that it is possible to determine isolated target areas via county assessors' offices. Once target areas were determined, mailings were implemented to corresponding postal carrier routes, rural routes, post office boxes, and neighborhoods. The mailings consisted of an attractive direct mail with a brochure application stapled inside.

As part of PG&E's rural outreach campaign, CARE implemented a retail display initiative. Through external research, PG&E determined that it was possible to create partnerships with retail chains such as convenience stores and grocery markets to display retail merchandising "clip strips" with CARE brochures attached. Clip strips were placed throughout the stores and customers were directed to take applications via the attached signage, "Free, take one."

These initiatives served to increase enrollment of eligible rural customers and to raise awareness of the CARE program in low-income areas.

Senior and Disabled Outreach

CARE outreach to seniors traditionally comes with several challenges. Seniors are often intimidated and overwhelmed by the thought of filling out long forms, gathering supporting documentation and following through on paperwork. Many are in need of assistance with these tasks.

CARE created a large print application in multiple languages, thus making it easier for seniors to apply for the program. These applications were distributed via senior centers and "In Home" senior services. Applications were printed in the Senior Magazine in the Sacramento area. CARE also created strategic partnerships with key organizations serving the senior and disabled population.

CARE also attended 59 senior/disabled events and distributed applications and collateral materials. These events included pre-event publicity by way of posters and flyers. A booth was set up on the day of the event and was staffed by representatives to answer questions and assist seniors with signing up.

CARE partnered with the Disability Rights Advocates (DRA) to reach out to disabled customers. A list of Independent Living Resource agencies was obtained and phone calls were made to enlist them in the COC program. CARE and the DRA also worked in tandem to create a direct mail piece that targeted the disabled population. DRA provided valuable information, such as criteria regarding font size, margins and white space. These criteria were implemented in the creation of the direct mail piece.

Web

PG&E continued to use its Web site to promote the CARE program. Each application was posted in-language and in a format that allowed easy download and printing. A Frequently Asked Question section accompanied each program

area and links to other assistance programs. Large-print CARE applications were also made available on the Web site in 2006. A detailed review and enhancement of the Web site was conducted to help streamline the flow of information to the customer. New images were added to the Web site thus making it more visually appealing and user-friendly. A large number of applications were downloaded and thousands of new customers were enrolled in the program as a result.

Other CARE Outreach Activities

Attachment C details PG&E's outreach and media activities during 2006.

B. Discuss each of the following:

1. Most effective outreach method, including a discussion of how success is measured.

As PG&E's CARE outreach campaign matures and continues to successfully enroll eligible customers, the challenge of reaching and enrolling those remaining customers becomes even more evident. In 2006, direct mail initiatives proved to be the most effective method of reaching out to these customers. The direct mail pieces provided information to eligible customers at home, thereby reducing barriers of accessibility to enrollment information.

The largest measurement of the outreach campaign's success is the change in PG&E's CARE net enrollment. The year started with 1,040,986 CARE customers and ended with 1,137,387, a net increase of 96,401 customers.

The success of the 2006 CARE outreach campaign cannot be attributed to direct mail alone. The campaign was successful due to the number and variety of the following outreach initiatives:

- CARE recruited and contracted with 76 community-based organizations to provide outreach to a variety of communities throughout its service area. COCs served a multitude of minority communities including: African American, Hispanic, Asian /Pacific Islander (e.g., Chinese, Vietnamese, Laotian, Hmong), senior citizens, rural communities, Native Americans and farm workers. PG&E supported the COCs through a variety of channels: a monthly newsletter, a toll-free phone and fax line, an email address, quarterly regional meetings, site visits and training sessions, partnered enrollment events and an "Enrollment Tips" booklet. This support enhanced PG&E's relationship with the COCs, generating 5,557 new enrollments. Due to the success of the COC partnership, PG&E expanded its number of COCs from 50 to 76. To aid with this expansion, CARE partnered with the Neighborhood Payment Center team and Governmental Relations.
- CARE continued to use a direct mail piece consisting of a bill insert application that was mailed to over 4 million customers.

- A CARE application was inserted into the PG&E bill for March in English and Spanish, generating 12,486 new enrollments.
- A CARE application was inserted into the PG&E bill for June in English and Vietnamese, generating 11,406 new enrollments.
- CARE leveraged with the Energy Partners program, generating 17,381 new enrollments.
- CARE leveraged with the Family Electric Rate Assistance (FERA) program, generating 5,507 new enrollments.
- PG&E customers continued to download CARE applications from the PG&E web site, generating 9,369 new enrollments.
- CARE continued to distribute multi-colored, multi-lingual brochure applications to various community-based organizations, COCs, churches, city and state offices and PG&E local offices, generating 3,093 new enrollments.
- CARE partnered with various public assistance organizations generating 586 new enrollments.
- CARE collaborated with HUD, generating 475 new enrollments.
- CARE partnered with Adult and Family Services to distribute mini applications and brochures to clients who receive food stamps, generating 1,459 new enrollments.
- 76 self-service kiosks operated in PG&E local offices, generating 9,382 new enrollments.
- CARE continued to utilize Point of Service (POS) boxes. These POS boxes were housed by:
 - COCs
 - Public assistance organizations
 - PG&E pay stations

The POS box generated 669 new enrollments.

- CARE inserted a mini application into a letter that addressed various options that customers have to save electricity and money during the winter months. This initiative generated 29,498 new enrollments.
- CARE inserted mini applications into the PG&E Welcome Packets that were disseminated to all new customers. This initiative generated 47,360 new enrollments.
- CARE sent a direct mail piece to a targeted low income database of 350,000 customers in January. This initiative generated 9,825 new enrollments.
- CARE sent a direct mail piece to a database of 25,000 customers who were previously over the income guidelines. This initiative generated 2,142 new enrollments.
- A door hanger application was distributed among predominantly Hispanic neighborhoods, generating 318 new enrollments.

- CARE sent a direct mail piece to a targeted low income database in April and in August. This initiative generated 11,707 new enrollments.
- A CARE advertisement with an application was published in the Pennysaver newspaper, generating 5,640 new enrollments.
- CARE utilized data from CC&B (PG&E's customer information system) to send out a targeted direct mail piece to customers (Medical Baseline, Life Support, 48-hours notice and credit deposit). This initiative generated 20,613 new enrollments.
- CARE distributed a door hanger direct mail piece sent to targeted zip codes, generating 334 new enrollments.
- CARE sent a "Piggybank" direct mail piece to customers in targeted zip codes, generating 1,388 new enrollments.
- CARE distributed brochure applications to low income apartment property managers for dissemination to their tenants at the end of May. This initiative generated 132 new enrollments.
- CARE declared June, "CARE Employee Involvement Month". PG&E employees were asked to pass on an application to a friend or relative who was eligible for the program. This initiative generated 320 new enrollments.
- CARE distributed mini applications to minimum wage employers for dissemination to their employees in June. This initiative generated 51 new enrollments.
- CARE implemented a Re-certification Direct Mail (RDM) initiative which was targeted toward customers failing to re-certify for the program. This initiative generated 8,607 new enrollments.
- CARE sent a Hispanic direct mail piece to the homes of eligible Hispanic customers. This initiative generated 2,577 new enrollments.
- CARE sent a direct mail piece to the homes of eligible African American, Native American, Hispanic and senior customers. This initiative generated 7,145 new enrollments.
- CARE sent a direct mail piece to a targeted database of low-income customers in rural areas. This initiative generated 358 new enrollments.
- CARE sent a Chinese direct mail piece to the homes of eligible Chinese customers. This initiative generated 118 new enrollments.
- CARE distributed applications at college campuses throughout the service area. This initiative generated 117 new enrollments.
- CARE sent a Vietnamese direct mail piece to the homes of eligible Vietnamese customers. This initiative generated 200 new enrollments.
- PG&E conducted a winter initiative campaign (November 2005 – April 2006). CARE participated in this campaign via the following avenues:
 - The CARE Income Guidelines were increased to 200% of the Federal Poverty Level.

- A CARE application was inserted into PG&E's 10/20 Program packet which included a letter (from the President and CEO of the PG&E Corporation) listing various ways to save energy throughout the winter months. This packet was mailed to all PG&E customers who were not enrolled in CARE.
- Proactive phone enrollment was conducted. CARE representatives called customers who had previously requested an application but did not submit it.
- Income verification of submitted applications was suspended.
- The re-certification timeframe was extended.
- A CARE advertisement with an application was printed in the Pennysaver publication. The application alerted customers that the income guidelines have increased and they may now qualify.
- An application with a letter was mailed to customers who had previously been over the CARE income guidelines.

The winter initiative campaign generated 81,162 new enrollments.

In 2006-2007, CARE also included an application in the Winter Initiative Program packet. The packet consisted of a letter from Helen Burt (then PG&E Senior Vice President of Customer Care) and a list of various ways to save energy. This initiative generated 10,011 new enrollments.

C. Discuss barriers to participation encountered during the reporting period and steps taken to mitigate them.

Language

With the increasingly diverse population of California and the wide geographic distribution of customers within PG&E's service area, it is no surprise that language continues to be a barrier to enrolling customers in the CARE program. The CARE program continued its work to ease this barrier by supporting, maintaining, and promoting the CARE toll-free phone line in five languages: English, Spanish, Cantonese, Mandarin and Vietnamese.

Additionally, CARE continues to print all applications, customer correspondence and collateral materials in four languages: English, Spanish, Chinese and Vietnamese.

Geography

Another barrier to enrollment is the extent to which customers are scattered throughout the PG&E service area. Although it is apparent from the county-by-county breakdown where the greatest population centers are located within PG&E's service area, it is the many rural miles between these urban centers that cause the most problem in reaching customers. CARE has made a concerted

effort to find and retain rural based organizations that are able to reach customers in these less populated locations.

Culture

Language barriers may be linked to cultural barriers, but they are not one and the same. CARE has found that removing language barriers does not necessarily address cultural barriers that prevent customers from seeking assistance. CARE contracted with a number of consultants, who helped CARE to include appropriate ethnic and cultural context in advertising and assistance messages throughout its communities. Special collateral materials were utilized, not just in-language, but also taking into consideration design and form, to reach the broadest number of customers within specific markets. Additionally, media and delivery channels were utilized that specifically addressed the ethnicity of the target market. The responses from these various approaches demonstrated the continued success of the program.

Trust

Customer issues such as mistrust and self-elimination present significant barriers to participation that become increasingly prevalent as CARE reaches deeper into the previously non-participating but eligible population. Although the reasons for mistrust are often cultural, CARE has come a long way towards understanding and interpreting these influences so that customers can feel comfortable with their decision to participate in the CARE program. The various COCs that have partnered with CARE are to thank for much of this success. These various organizations, often working in particular communities previously unreachable by CARE, have been instrumental in breaking down barriers and enrolling customers.

D. How CARE customer data and other relevant program information is shared by the utility with other utilities sharing its service territory.

PG&E borders two investor-owned utilities in a small geographic location of its service area. PG&E implemented automatic enrollment agreements with Southern California Gas, Southern California Edison and Sacramento Municipal Utility District to regularly exchange listings of enrolled CARE customers that are identified in the shared service areas. Through these exchanges, PG&E enrolled nearly 9,000 customers into the CARE program in 2006. PG&E plans to continue exchanging CARE customer listings with these utilities.

E. How CARE customer data and other relevant program information is shared within the utility, for example, between its LIEE and other appropriate low-income programs.

The entire database of participating CARE customer contact information was uploaded for distribution to PG&E's LIEE program providers quarterly to use for their outreach.

Since November 1, 2005, when the LIEE and CARE income guidelines became the same at 200% of the Federal Poverty Guidelines, CARE has been able to automatically enroll all customers who have participated in the LIEE program (whose income had previously been verified).

Since the CARE discount was noted in CC&B, customer service representatives see the CARE status of any customer that phones PG&E's call center for assistance. This provided important information for the customer service representative to use when discussing other benefits and services that may be of assistance to the low income customer.

CARE featured other financial assistance information on its applications. Each application that was delivered to a customer provided a brief description of other assistance programs available as well as contact numbers.

Representatives in PG&E's customer service call center were instructed to provide information on the federally funded, state administered Home Energy Assistance Program (HEAP) program. Customers were also able to contact PG&E regarding other payment assistance programs (including CARE, REACH, Third Party Notification, Balanced Payment Plan, Automatic Payment Service, FERA, Medical Baseline and Energy Partners). The CARE processing center also provided referral information to customers in need of additional assistance.

- F. Attach a copy of the utility's agreement with CSD. Describe the process for cross-referral of low-income customers between the utility and CSD. Describe how the utility's CARE customer discount information is provided to CSD for inclusion in its federal funds leveraging application. (Note: These agreements are limited to sharing 1-800 phone numbers with customers and providing CARE benefit information for the federal fiscal year, October 1 of the current year through September 30 of the subsequent year. There are no tracking mechanisms in place to determine how many customers contact the other programs or actually become enrolled in other program(s) as a result of these agreements.)***

PG&E has provided assistance in leveraging federal funding through the Home Energy Assistance Program (HEAP) on an annual basis since 1989. The primary information provided to the California Department of Community Services and Development (CSD) is a monthly breakdown of the total number of participants (residential and sub-metered tenant count) along with the total dollar amount of discount provided to that portion of the population during that period.

In July 2005, PG&E received a listing of CSD information from the Commission's Energy Division. This listing was used to match CSD customers with their PG&E accounts. A letter was mailed to the identified customers giving them 30 days to opt out of the program. After the 30-day opt-out period, over 3,000 PG&E customers were then automatically enrolled into the CARE program. PG&E received no CSD files from the Energy Division in 2006.

PG&E continues to support attempts to automatically enroll qualifying customers into CARE and is currently working with Energy Division staff and the California Department of Health and Human Services (DHHS) to develop a pilot program to automatically enroll participants from the Women with Infants and Children (WIC) Program into CARE in compliance with Senate Bill 580.

G. Discuss any recommendations to improve cost-effectiveness, processing of applications, or program delivery. Discuss methods investigated or implemented by the utility or third parties under contract to the utility to improve outreach and enrollment services to non-participating households in the prior year. Provide cost-effectiveness assessments, if available.

CARE implemented several changes and additions to improve cost-effectiveness.

PG&E implemented a new system for electronically scanning and archiving all certified applications for the CARE program. Certified applications are scanned on a daily basis and uploaded to a digital library in the Electronic Document Management System on the PG&E Intranet. Authorized CARE program employees are then able to perform an online search based on the customer's PG&E account number in order to locate the electronic image of the application for reference. The implementation of this system has greatly reduced the time necessary to locate a customer application, resulting in improved customer satisfaction with the CARE program. With the CARE program processing hundreds of thousands of applications on an annual basis, the new system is more efficient and less prone to human error, reducing the possibility of misfiled applications.

PG&E also continued to make improvements in the tracking and analysis of individual CARE outreach initiatives. New procedures were implemented, using the recently added source codes on all CARE outreach applications for tracking each application type from the point that it is received and classifying the application as a new enrollment, re-certification, or duplicate. This analysis is now available on a monthly and year-to-date basis and is instrumental in determining the cost-effectiveness and success of each outreach initiative.

A variety of new methods served to improve outreach and enrollment services to non-participating households. Direct mail procedures were improved as potential CARE customer lists were merged with data from PG&E's customer information system. Current customers were removed from the mail files thereby reducing duplication rates and increasing cost-effectiveness. This enhanced method of creating and sorting the customer mailing lists has become the standard.

The following direct mail initiatives were implemented to improve outreach and enrollment services:

- Namefinders direct mail: Purchased a list of customers who fit CARE criteria, including income levels, household size and geographic location.
- Refer-a-Friend direct mail: Corresponded with current CARE customers inviting them to pass on an application to an eligible friend or relative.
- Cordaptix direct mail: Data from PG&E's customer information system was utilized. The data retrieved included customers who were on medical baseline and life support, as well as those who had received a 48-hour notice or had been required to submit a credit deposit.
- Pennysaver direct mail: Purchased ad space and inserted a mini application in the *Pennysaver* coupon book, which directly targets customers by income and zip code.
- HUD direct mail: Partnered with the Department of Housing and Urban Development to implement a direct mail initiative targeting tenants of public housing authorities.
- POI direct mail: Data from PG&E's customer information system was utilized. The data retrieved was used to implement a direct mail initiative targeting customers who had previously been above the income guidelines.

CARE worked with PG&E's customer service department to insert a mini application into welcome packets which were distributed to all new customers. This initiative proved to be highly cost-effective because the only incremental cost incurred was that of printed applications.

Recognizing that PG&E employees have great potential as CARE advocates, the CARE team invited all employees to pass on an application to a friend or family member who may qualify. These applications were inserted into employee paychecks and also distributed daily during Employee Involvement Month.

CARE participated in 184 multicultural events bringing a face and personality to the program. CARE also utilized events as opportunities to network with organizations with similar needs.

A large print CARE application was utilized to assist seniors in reading the information necessary to complete the application. This application was also made available on the web site in PDF format.

New avenues were employed to reach the rural population. PG&E sent CARE applications to low income apartment and housing complex managers for distribution to their tenants. PG&E also sent applications to employers of a primarily minimum wage workforce. Information from the county assessors' offices was utilized to send a direct mail piece to customers living in rural postal carrier routes, counties, and post office boxes. CARE displayed retail merchandising "clip strips" with attached brochures throughout convenience stores and grocery markets in rural areas.

For details of these successful new initiatives, please see the “2006 CARE Outreach Campaign Activity Highlights” portion of the annual report.

V. PROCESSING CARE APPLICATIONS

A. Processing Self-Certification and Self-Recertification Applications (Individual and Sub-metered Customers)

1. *Provide the total number of third-party CARE applications received, approved, denied, pending/ incomplete, or duplicates in the reporting period.*

See Table 7.

2. *Provide the number of utility CARE self-certification and self-recertification applications provided, received, approved, denied, pending/never completed, or duplicates for the reporting period.*

See Table 8.

3. *Provide a table showing the number of customers removed from CARE by month due to the recertification process. (NOTE: Customers may be removed due to a variety of reasons including: non-response to a request to recertify, failure to complete the application process, ineligibility, or by customer request due to changed eligibility status.)*

See Table 9.

4. *Describe the utility’s process for recertifying sub-metered tenants of master-meter customers.*

PG&E requested recertification based upon the original certification date for the tenant within each facility. Each month, tenants certified one year previously are mailed a new application and a request for recertification of their eligibility for CARE.

The tenants are given 90 days to complete their application and return it to PG&E. Tenants failing to return the application within 90 days are removed from the sub-metered CARE listing for the facility and a revised listing is mailed to the manager/landlord notifying them of the change in the tenant’s eligibility.

B. Processing Random Post-Enrollment Verification Applications

1. *Provide a table showing the number of customers removed from CARE by month due to the verification process. (NOTE: Customer may be removed due to a variety of reasons including: non-response to a request to verify income, failure to complete the verification process, ineligibility, or by customer request due to changed eligibility status.)*

See Table 9.

2. *Provide the total number of applications mailed, received, approved, denied, pending/never completed, or duplicates, for the reporting period.*

See Table 10.

- C. *Describe any contracts the utility has with third parties to conduct certification, recertification and/or verification on the utility's behalf. Describe how these third-party efforts compare to the utility's efforts in comparable customer segments, such as hard-to-reach or under-served. Include comparisons of effectiveness and cost-effectiveness of comparable customer segments, if available.*

PG&E had no third party contractors performing these duties in 2006. All these functions were performed by the CARE Processing Center within PG&E.

VI. PROGRAM MANAGEMENT

- A. *Discuss issues and/or events that significantly affected program management in the reporting period and how these were addressed.*

PG&E conducted a 2005-2006 winter initiative campaign which included a CARE application and a letter from the President and CEO of the PG&E Corporation listing various ways to save energy throughout the winter months. This packet was mailed to all PG&E customers who were not enrolled in CARE. Also, proactive phone enrollment was conducted, income verification was suspended and recertification was extended during this period. An application with a letter was also mailed to customers who had previously been over the CARE income guidelines and a CARE advertisement was printed in the Pennysaver publication. PG&E proactively conducted another winter campaign in 2006-2007 which included a CARE application and a letter (from the then Vice President of Customer Care) listing various ways to save energy throughout the winter months.

VII. CARE Expansion Program

This section covers the nonprofit homeless shelters and group living facilities, migrant and farm worker housing centers, qualified privately-owned employee housing, and qualified nonprofit housing for agricultural employees.

A. PARTICIPANT INFORMATION

Provide the total number of residential and/or commercial facilities by month, by energy source for the reporting period.

See Tables 11A and 11B.

1. *State the total number of residents (excluding caregivers) for residential facilities, and for commercial facilities, by energy source, at year-end.*

There were 60,676 tenants residing within facilities receiving the CARE discount by December 31, 2006. This information is not available by energy source. The resulting numbers were representative of the total number of residents housed in all facilities, both residential and commercial, and for both energy commodities.

B. USAGE INFORMATION

Provide the average monthly usage by energy source per residential facility and per commercial facility.

See Table 12.

C. PROGRAM COSTS

1. ***Administrative Cost***

Show the CARE Expansion Program's administrative cost by category.

See Table 5, CARE Expansion Administrative Cost Reporting Categories.

2. ***Discount Information***

- a. *State the average annual CARE discount received per residential facility by energy source.*

Electric: \$315.60 Gas: \$136.20

- b. *State the average annual CARE discount received per commercial facility by energy source.*

Electric: \$6,811.99 Gas: \$2,331.26

D. OUTREACH

1. *Discuss utility outreach activities and those undertaken by third parties on the utility's behalf.*

CARE conducted outreach to a variety of nonprofit housing facilities and public assistance organizations throughout PG&E's service area. PG&E continued to reach out to nonprofit facilities and implement a variety of approaches to target these facilities currently not enrolled in the CARE program.

PG&E purchased a list of nonprofit organizations from a third party vendor in order to conduct a direct mail initiative. The list contained two types of nonprofit organization information. The first list contained contact information for organizations that matched the criteria for the CARE nonprofit living facilities program. For these organizations, PG&E had confirmation of their 501(C)(3) status and verified that these nonprofits were eligible to receive CARE. The second list contained information about organizations that were not confirmed as having 501(C)(3) status. The direct mail piece was sent to this list informing these organizations about the CARE program and eligibility requirements. This direct mail initiative was highly effective in raising awareness of the CARE nonprofit living facilities program and assisting a number of organizations in enrolling in the program.

PG&E continued to reach out to agricultural facilities and implement a variety of approaches to target these facilities not currently enrolled in the CARE program. CARE participated in the 25th Annual Migrant Parents Conference. PG&E provided CARE information to family members living in or near agricultural facilities. The participation by PG&E was helpful in the dissemination of information to areas where the communication channel might not be as ample.

An article describing the CARE Agricultural Housing Facility Program and its eligibility requirements was published in the Agsafe newsletter. This newsletter was distributed to various agricultural housing facilities. The article contained a call to action asking facility managers to contact CARE for more information.

CARE continued to use the PG&E Web site as a useful source of information. As new applications and income guidelines became available, each expanded program application was made available in local offices and was also posted online in formats that allowed for easy download and printing. A *Frequently Asked Question* section accompanied each program area and links to other

assistance programs were provided. Feedback from users of the Web site as well as outreach partners continues to allow for improvement of the site in 2007.

2. Discuss each of the following:

- a. *Most effective outreach method, including a discussion of how success is measured.*

Nonprofit and agricultural direct mail was the most effective method for the CARE expansion program. PG&E collected and utilized databases containing nonprofit and agricultural organization contacts in PG&E's service area that best fit the CARE expansion program guidelines. Moreover, word-of-mouth continued to be an effective way to enroll new organizations onto CARE.

PG&E continued to re-enroll a number of eligible organizations that were previously de-certified because of non-response to the annual re-certification letters. By directly contacting them through either written correspondence and/or phone calls, PG&E reminded these previous CARE recipients about the benefits of annually re-certifying and assisted them in re-enrolling.

PG&E retained a higher percentage of nonprofit customers during re-certification periods. The expansion of contact persons for each organization, improvements in how PG&E requests documentation and greater frequency in follow-ups with each organization greatly helped in keeping eligible housing facilities on the CARE program.

- b. *How the CARE facility data and relevant program information is shared by the utility with other utilities sharing service territory.*

PG&E does not currently exchange CARE facility data or expansion program information with other utilities in the shared service areas.

- c. *Barriers to participation encountered in the prior year and steps taken to mitigate these, if feasible, or not, if infeasible.*

There continued to be some confusion over the eligibility criteria for the expanded programs. Often, customers did not understand the criteria to fulfill the eligibility for a nonprofit group living facility or agricultural employee housing.

For example, the CARE program received a number of nonprofit applications that were actually for single-family customers. Because more than one family was living on the premises and, therefore, was on the same PG&E account, the customers believed they should apply for the nonprofit group living facility program. For nonprofit organizations that served as group living facilities, defining established on-site social services for residents proved challenging. Some organizations did not clearly specify in their applications the type of services they provide to

their clients. At times, it was determined that the organizations only provided lodging and did not qualify for the program.

Also, there continued to be delays from customers not supplying supplementary documentation needed to support the application process. To mitigate the situation, various means of communication and follow-up with the client kept many of the organizations properly informed about eligibility and eventual certification.

There was ongoing confusion regarding customers' tax exemption status. Many customers believed that if they hold 501(c)(3) tax exemption status, they also automatically qualified for the CARE expansion program. In order to qualify for nonprofit group living facility status, residential services must account for 70% of the facilities' energy usage and on-site social services must be provided to facility residents. In these cases, the qualifications were explained to the customer to help determine their eligibility.

For the agricultural housing program, there has also been a misbelief that if residential customers were actual farm workers, they should enroll in the expanded program. Again, customers were informed that they were eligible for the residential programs and correctly enrolled at that time. For some time, the California Office of Migrant Services farm worker housing centers could not qualify for CARE due to the 100% income eligibility requirements for all its residents. However, Assembly Bill (AB) 868 allowed the enrollment of all active state migrant farm worker housing centers into CARE on the basis that a large percentage of the residents were low income. Therefore, more eligible agricultural housing facilities participated in CARE.

3. ***Discuss any recommendations to improve the cost-effectiveness, processing of applications, or program delivery. Discuss methods investigated or implemented by the utility or third parties on the utility's behalf to improve outreach and enrollment services to non-participating facilities in the prior year. Provide cost-effectiveness assessments, if available.***

PG&E did not implement any new process improvements or outreach initiatives in 2006 but continued all of its successful initiatives from 2005.

E. PROCESSING CARE APPLICATIONS

1. ***Processing Self-Certification and Self-Recertification Applications***

- a. *Provide the total number of third party CARE Expansion program applications received, approved, denied, pending/never completed, or duplicates.*

See Table 13.

- b. Provide the total number of utility CARE Expansion program applications received, approved, denied, pending/never completed, or duplicates for the reporting period.*

See Table 13.

- 2. Describe any contracts the utility has with third parties to conduct certification, recertification and/or verification on the utility's behalf. Describe how these third-party efforts compare to the utility's efforts in comparable customer segments such as hard-to-reach or under-served. Include comparisons of effectiveness and cost-effectiveness of comparable customer segments, if available.*

PG&E worked with Namefinders, Inc. to obtain listings of eligible housing facilities to participate in the CARE expansion program. These lists were used to introduce CARE to nonprofit and agricultural employee housing facilities. Program information and applications were mailed to these facilities in an effort to enroll them into CARE.

F. PROGRAM MANAGEMENT

- 1. Discuss issues and/or events that significantly affected program management in the reporting period and how these were addressed.*

There were no issues and/or events that significantly affected program management in the reporting period.

Tables

TABLE 1		
RESIDENTIAL CARE PROGRAM Customers by Month¹		
2006	CARE Customers	Percentage Change
January	1,072,766	3.05%
February	1,088,653	1.48%
March	1,110,013	1.96%
April	1,118,339	0.75%
May	1,118,907	0.05%
June	1,116,669	-0.20%
July	1,115,990	-0.06%
August	1,121,245	0.47%
September	1,125,676	0.40%
October	1,120,469	-0.46%
November	1,126,953	0.58%
December	1,137,387	0.93%

1 Total individual and sub-metered.

TABLE 2.1			
CARE RESIDENTIAL PENETRATION RATE Electric-Only Customers			
2006 Quarter Ending	CARE Residential Electric-Only Customers	CARE-Eligible Electric-Only Customers	CARE Electric- Only Customers Penetration Rate
March 31	262,210	435,236	60%
June 30	262,919	435,236	60%
September 30	266,314	435,236	61%
December 31	267,972	435,236	62%

TABLE 2.2			
CARE RESIDENTIAL PENETRATION RATE			
Gas-Only Customers			
2006 Quarter Ending	CARE Residential Gas-Only Customers	CARE-Eligible Gas-Only Customers	CARE Gas-Only Customer Penetration Rate
March 31	170,447	263,787	65%
June 30	174,571	263,787	66%
September 30	175,541	263,787	67%
December 31	179,537	263,787	68%

TABLE 2.3			
CARE RESIDENTIAL PENETRATION RATE			
Gas and Electric (Dual-Commodity) Customers			
2006 Quarter Ending	CARE Residential Dual-Commodity Customers	CARE-Eligible Dual-Commodity Customers	CARE Dual-Commodity Customer Penetration Rate
March 31	677,356	837,122	81%
June 30	679,179	837,122	81%
September 30	683,821	837,122	82%
December 31	689,878	837,122	82%

TABLE 2.4			
CARE RESIDENTIAL PENETRATION RATE			
Households			
2006 Quarter Ending	CARE Residential Households	CARE-Eligible Households	CARE Household Penetration Rate
March 31	1,110,013	1,536,146	72%
June 30	1,116,669	1,536,146	73%
September 30	1,125,676	1,536,146	73%
December 31	1,137,387	1,536,146	74%

TABLE 3			
AVERAGE MONTHLY GAS / ELECTRIC USAGE			
Residential Non-CARE vs. CARE Customers¹			
Customer	Gas Therms Tier 1	Gas Therms Tier 2	Total
Non-CARE	27.5	12.1	39.6
CARE	23.7	10.8	34.6
Customer	Electric KWh Tier 1	Electric KWh Tier 2	Total
Non-CARE	336	248	584
CARE	348	181	529

1 Excludes master-meter usage.

TABLE 4		
AVERAGE MONTHLY GAS / ELECTRIC BILL		
Residential Non-CARE vs. CARE Customers¹		
(Dollars per Customer)		
Customer	Gas	Electric
Non-CARE	\$50.17	\$96.06
CARE	\$34.28	\$46.05

1 Excludes master-meter usage.

Table 5					
Standardized CARE Administrative Cost Reporting Categories					
2006 Costs by Energy Source					
Category	Residential		Expanded		Total
	Electric	Gas	Electric	Gas	
Outreach	\$3,311,711	\$1,783,229	\$3,383	\$1,821	\$5,100,144
Automatic Enrollment	\$1,338	\$721	\$0	\$0	\$2,059
Processing/ Certification/Verification	\$1,094,348	\$589,264	\$57,110	\$30,751	\$1,771,473
Information Technology / Programming	\$26,865	\$14,466	\$565	\$304	\$42,200
Pilots	\$0	\$0	\$0	\$0	\$0
Measurement & Evaluation	\$0	\$0	\$0	\$0	\$0
Regulatory Compliance	\$51,491	\$27,726	\$0	\$0	\$79,217
General Administration	\$257,323	\$138,558	\$0	\$0	\$395,881
LIOB	\$0	\$0	\$0	\$0	\$0
CPUC Energy Division	\$47,032	\$25,325	\$0	\$0	\$72,357
TOTAL Program Costs	\$4,790,108	\$2,579,289	\$61,057	\$32,877	\$7,463,331
CARE Rate Discount	\$367,230,046	\$86,624,297	\$3,508,840	\$1,014,353	\$458,377,536
Service Establishment Charge Discount	\$0	\$0	\$0	\$0	\$0
TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	\$372,020,154	\$89,203,586	\$3,569,897	\$1,047,230	\$465,840,867

TABLE 6A -ELECTRIC					
CARE SURCHARGE AND REVENUE COLLECTED BY CUSTOMER CLASS					
Customer Class	Average Monthly		CARE Surcharge as Percent of Bill	Total CARE Surcharge Revenue Collected	Percentage of CARE Surcharge Revenue Collected
	CARE Surcharge	Monthly Bill			
Residential*	\$1.02	\$96.85	1.05%	\$42,984,955.78	32.26%
Commercial	\$9.27	\$719.71	1.29%	\$57,261,773.96	42.97%
Agricultural	\$6.99	\$519.62	1.35%	\$6,622,420.44	4.97%
Large/Indust	\$1,811.47	\$90,076.47	2.01%	\$26,382,794.36	19.80%

* Excludes CARE customers

TABLE 6B - GAS					
CARE SURCHARGE AND REVENUE COLLECTED BY CUSTOMER CLASS					
Customer Class	Average Monthly		CARE Surcharge as Percent of Bill	Total CARE Surcharge Revenue Collected	Percentage of CARE Surcharge Revenue Collected
	CARE Surcharge	Monthly Bill			
Residential	\$0.97	\$50.17	1.9%	\$58,015,713.06	40.8%
Commercial	\$11.57	\$334.36	3.5%	\$29,463,685.43	20.7%
Industrial	\$7,257.87	\$20,187.17	36.0%	\$54,612,014.24	38.4%

NOTES:

Industrial includes both G-NT(D) and G-NT(T) and is net of volumes qualifying for G-COG.

TABLE 7
CARE Community Outreach Project
January 1, 2006 through December 31, 2006

Entity	Total Received	Approved	Denied	Pending/ Never Completed	Duplicate
Airport Neighbors United	7	5	2	0	0
Allen Temple Health and Social Services Ministries	61	26	35	0	0
Alameda County Associated Community Action	8	5	1	0	2
Amador-Tuolumne Community Action Agency	74	34	40	0	0
Area 12 Agency on Aging	18	13	8	0	0
Asian Community Mental Health Services	39	12	27	0	0
Asian Resources	41	24	17	0	0
California Association of Area Agencies on Aging	1,755	471	764	192	328
California Welfare To Independence Network 2000, Inc.	0	0	0	0	0
CARECEN Family Services Program	8	3	5	0	0
Catholic Charities Diocese of Fresno	415	105	183	3	124
Catholic Charities Diocese of Stockton	7	4	0	0	3
Center for Training and Careers, Inc.	24	10	12	0	2
CET Santa Maria	2	1	1	0	0
Central Coast Energy Services, Inc	763	410	324	3	26
Central Latino de San Francisco	3	2	1	0	0
Central Valley Opportunity Center	311	60	231	0	20
Centro Legal de la Raza, Inc	28	8	17	0	3
Charles P. Foster Foundation	2	1	1	0	0
Child Care Links	63	35	28	0	0
Chinese Christian Herald Crusades	30	14	16	0	0
Community Action Agency of Butte County, Inc.	196	142	52	0	2
Community Action of Napa Valley	5	2	3	0	0
Community Action Marin	453	331	115	7	0
Community Gatepath	0	0	0	0	0
Community Resource Project, Inc.	495	321	165	7	2
Communication Services, LLC	1,229	636	561	26	6
Council for the Spanish Speaking	0	0	0	0	0
County of San Benito Community Services & Workforce Development	33	26	6	0	1
Cupertino Community SVCS Inc.	37	23	13	0	1
Davis Street Community Center	51	34	15	0	2
Delta Community Services, inc.	5	3	2	0	0
Disability Resource Agency for Independent Living	26	16	9	0	1
Familia Unidas	13	3	9	0	1
Franklin McKinley Education Foundation	12	3	8	0	1
God Financial Plan, Inc.	8	2	6	0	0
Heavens Gate Employment of California	5	4	1	0	0
Heritage Institute for Family Advocacy	647	354	279	0	14
Hip Housing Human Investment Project, Inc.	12	6	4	0	2
Housing Rights	2	2	0	0	0
Independent Living resource Center SF	0	0	0	0	0
Independent Living Center of Kern County, Inc.	0	0	0	0	0
Indian Health Center of Santa Clara Valley	28	17	11	0	0
Kings Community Action Organization, inc.	0	0	0	0	0
La Luz Bilingual Center	20	11	7	0	2

Table 7 (continued)

Entity	Total Received	Approved	Denied	Pending/ Never Completed	Duplicate
Madera County Community Action Agency, Inc.	50	39	11	0	0
Mendocino Latinos Para La Comunidad Inc.	2	2	0	0	0
Merced County Community Action Agency	114	75	35	0	4
Merced Lao Family Community Inc.	33	23	10	0	0
Monument Crisis Center	0	0	0	0	0
Native American Health Center	1	1	0	0	0
Ninth District CME Church	2	2	0	0	0
Northeast Community Federal Credit Union	18	11	7	0	0
North Coast Opportunities, Inc.	15	7	7	0	1
Oakland Citizens Committee for Urban Renewal (O.C.C.U.R.)	59	37	21	0	1
Partners For Peace	243	38	203	0	2
People of Purpose	6	6	0	0	0
Peoples Community Partnership Federal Credit Union	13	5	8	0	0
Plumas County Community Development Commission	18	12	5	0	1
Plumas Crisis Intervention & Resource Center	25	21	4	0	0
Proteus Inc.	25	8	17	0	0
Q Foundation DBA Aids Housing Alliance SF	6	5	0	0	1
Redwood Community Action Agency	119	91	27	0	1
Regional Technical Training	0	0	0	0	0
RetroTech, Inc.	1,223	994	187	0	42
Rising Sun Energy Center	248	163	76	0	9
Sacramento Lao Family Community	0	0	0	0	0
Salvation Army Golden State Divisional Headquarters	432	228	175	0	29
San Francisco Community Power Cooperative	2	1	1	0	0
San Francisco / Sacramento district (AMEC)	74	29	43	0	2
San Francisco Women's Center	0	0	0	0	0
Second Harvest Food Bank of Santa Cruz and San Benito Counties	1	1	0	0	0
Seniors First	21	14	7	0	0
Shoreview Residents Association, Inc.	13	7	6	0	0
Southeast Asian Institute for Advancement, Inc.	49	10	39	0	0
Universal Multi-Cultural Awareness Foundation	0	0	0	0	0
Volunteer Center Of Sonoma County	60	36	20	1	3
Winegard Energy	230	170	58	0	2
YMCA of East Bay West Contra Costa	35	16	17	0	2
Yuba Sutter Legal Center	70	41	29	0	0
Totals	10,143	5,272	3,992	239	643

* Capitation fees for current month enrollments are paid in the following month. Therefore, the fees do not directly correspond with the number of enrollments.

TABLE 8						
CARE Self-Certification and Self-Re-certification Applications¹						
	Provided	Received	Approved	Denied	Pending/Never Completed	Duplicates
Total	n/a	695,567	633,740	6,369	55,458	148,797
Percentage	n/a	100.00%	91.11%	0.92%	7.97%	21.39%

- The number of applications provided is not available, as millions of applications are in circulation due to multiple bill inserts and outreach initiatives..
- Duplicates are counted as approved as well, so the total will not add up to 100%.

¹ Includes sub-metered customers.

TABLE 9			
RESIDENTIAL CARE PROGRAM			
Customers¹ Removed by Month through Recertification and Post-Enrollment Verification			
2006	Recertification	Post-Enrollment Verification	Total
January	0	0	0
February	0	0	0
March	0	0	0
April	0	0	0
May	7,516	0	7,516
June	9,552	0	9,552
July	8,598	0	8,598
August	6,712	1,363	8,075
September	7,116	1,608	8,724
October	14,866	1,331	16,197
November	4,585	1,860	6,445
December	4,016	2,333	6,349
Total	62,961	8,495	71,456

- PG&E did not drop any customers for failure to respond to random verification or recertification requests from 11/1/05 through 4/30/06 as part of the Winter Customer Care and Relief Program.

¹ Total individual and sub-metered.

TABLE 10						
CARE Random Post-Enrollment Verification Applications						
	Mailed	Received	Approved	Denied	Pending/Never Completed	Duplicates
Total	20,809	7,015	6,988	27	13,794	n/a
Percentage	100.00%	33.71%	33.58%	0.13%	66.29%	n/a

* Duplicates were included in the Random Post-Enrollment Verification process, but were not specifically tracked.

TABLE 11 A			
CARE EXPANSION PROGRAM Participating Facilities by Month (Gas)			
2006	CARE Residential Facilities	CARE Commercial Facilities	Total
January	2,018	284	2,302
February	2,031	287	2,318
March	2,078	287	2,365
April	2,103	291	2,394
May	2,109	293	2,402
June	2,151	298	2,449
July	2,225	307	2,532
August	2,328	321	2,649
September	2,411	334	2,745
October	2,429	344	2,773
November	2,466	337	2,803
December	2,547	351	2,898

TABLE 11B			
CARE EXPANSION PROGRAM Participating Facilities by Month (Electric)			
2006	CARE Residential Facilities	CARE Commercial Facilities	Total
January	2,349	358	2,707
February	2,361	359	2,720
March	2,417	361	2,778
April	2,441	363	2,804
May	2,453	365	2,818
June	2,506	373	2,879
July	2,543	381	2,924
August	2,683	412	3,095
September	2,762	426	3,188
October	2,816	447	3,263
November	2,847	438	3,285
December	2,941	453	3,394

TABLE 12		
CARE EXPANSION PROGRAM		
Average Monthly Gas / Electric Usage¹		
	Gas	Electric
Customer	Therms	KWh
Residential Facilities	45	699
Commercial Facilities	670	8,935

1 Excludes master meter usage.

TABLE 13					
CARE EXPANSION PROGRAM					
CARE Outreach Pilot, Other Outreach, and Utility					
CARE Applications Sent By Third Parties					
Entity	Received	Approved	Denied	Pending/Never Completed	Duplicates
Third-Parties	0	0	0	0	0
Utility	481	395	38	24	24
Total	481	395	38	24	24
Percentage	100.00%	82.12%	7.90%	4.99%	4.99%

ATTACHMENT A

TECHNICAL ADDENDUM: JOINT-UTILITY METHODOLOGY FOR CALCULATING CARE PENETRATION

**Workshop on Penetration Rates for
CARE and ULTS Programs**

February 6, 2002

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Joint-Utility Methodology for Calculating CARE Penetration: Technical Description

INTRODUCTION

This document discusses existing methods used by the joint energy utilities and raises methodological issues regarding estimating CARE eligibility and penetration. This serves as a technical supplement to the joint utilities' presentation on their methodology for calculating CARE penetration rates as given at the Workshop on Penetration Rates for CARE and ULTS Programs on February 6, 2002. The remaining sections of this document contain: an example table showing the joint distribution of household size and income from PUMS; example tables showing the separate current-year distributions for household size and household income from the commercial data vendor; detailed information on iterative proportional fitting; a list of data used in the estimation work; and, definitions of technical terminology.

Objective of the Method

The initial objective presented to the consultant, Athens Research, was to estimate annually, for each unique county/utility/ commodity (fuel type), the proportion of technically eligible utility-served households (i.e., the fraction of individual residential meters and qualified sub-meters that are eligible for CARE based on household size and household income). The CARE demographic eligibility rate (i.e., ratio or proportion) was to be estimated annually, and utilities were to apply that ratio to their quarterly counts on individual residential meters and qualified sub-meters (i.e., technical eligibility) to obtain updated CARE eligibility counts. The second objective was to streamline and document the estimation programs, and to complete sensitivity tests and validation exercises begun during the estimation period. This second objective is only now being undertaken, a delay due in small part to additional ad hoc exercises that were added by the Commission, including estimating LIEE demographic eligibility, and estimating the rural and non-rural shares of each unique county/utility/commodity's (CUC's) total eligibility.

Major Features of the Method

The method combines current-year estimates of household size distributions and household income (separate distributions) with Census year estimates of the joint distribution of household size and household income, to estimate current-year demographic eligibility. Census year income data from PUMS (sample household long form Census data) is transformed to account for CPI changes in California, and to conform to categories of income available in current-year vendor data. Meter/sub-meter information from each utility is used to tailor demographic eligibility to specific CUC's.

Specifically, the *joint* distribution of household size and income available from PUMS is modified using *iterative proportional fitting*² to match current-year distributions on household size and income, providing a new estimate of the joint distribution. From the new joint distribution, current-year demographic eligibility per CUC is estimated; this is applied to quarterly counts of technical eligibility by utility staff, to obtain quarterly program eligibility count estimates. Finally, the total number of CARE participants (taken from utility program records) is divided by the total counts of program eligibility to calculate the CARE eligibility rate for a specific CUC.

Description of THE METHOD

Experience has shown that the method is somewhat better understood if the core process is described first, followed by a description of the preceding steps that are completed prior to carrying out the core process. Having this in mind, we begin with an overview of the core process.

Core Process

For each and every unique county/utility/commodity (fuel type), we have several key matrices or tables, defined by the household size categories that are available in current-year vendor data and the household

² See the subsequent section on iterative proportional fitting for a detailed technical explanation of this method.

income categories (ranges) that are used in current-year vendor data.³ The first matrix or table, Table 1, has 14 rows and 6 columns (14 x 6) and contains the *joint income by household size* distribution observed in the most recent PUMS data set (PUMS 1990 in our case). Incomes are given in current-year dollars (CPI adjusted), and as previously indicated, the income categories match those used in the vendor data. Each cell of this table contains the number of households for a particular income category and household size. For example, cell XYZ shows the number of households in income range \$20,000 – \$24,999 and household size 3. Note this table is arbitrarily normalized so that the sum of all the cells in the table totals 1,000,000 and could be normalized to any number as long as the relationship between household income and size remains the same.

The second table, Table 2, is also 14 x 6, and its cells show, for every corresponding cell in Table 1, the proportion of households that would have been program eligible based on current-year dollars. In all but six or seven cells, the proportion of eligible households equals either 1 (i.e., all households are eligible) or 0 (i.e., no households are eligible). For one cell in each household size group 1-5, and for one or two cells in the household size group 6+, some households will be above and some below the size/income threshold for CARE, so that the proportion in the cell equals a value between 0 and 1.⁴ Note that Table 2 can be constructed to reflect CARE, LIEE, or any other program eligibility standard. For example, with respect to the LIEE program, we have constructed an alternative, which gives the proportion of households that are eligible at either the 175% eligibility level or the 200% eligibility level applicable where the head is age 60 or work-prevented.

Next, to represent the current-year income distribution, we construct from vendor data, a set of current-year household income marginals (i.e., the number of households in each of the fourteen current-year household income ranges). For example, in Table 3 below, cell ABC shows the number of households in the income range, \$15,000 - \$19,999. As in the case for Table 1, the total of all the cells in this 14 x 1 table is normalized to a total of 1,000,000 for convenience.

To represent the current-year household size distribution, we construct from vendor data, a set of current-year household size marginals (i.e., the number of households in each of the six current-year household size categories). For example, in Table 4 below, cell DEF shows the number of households with a household size equal to 5. Notice that these two separate distributions (e.g., the current-year household income distribution and the current-year household size distribution are “pieces” of a joint distribution of household income and size.

³ For the purposes of this project, Applied Geographic Systems is the commercial data vendor who provided the current-year income and household size distribution data. There were six categories for household size (1, 2, 3, 4, 5, 6+) and 14 categories (ranges) of income (\$0-\$40,000 by intervals of \$5,000, followed by somewhat larger intervals at higher income levels).

⁴ The proportions in the first column of Table 2 are given only for example and should not be viewed as actual values.

Table 1		Joint Distribution of Household Income and Size (1990)					
		Household Size Categories					
Household Income	Income Ranges	1	2	3	4	5	6+
	0-4,999			...			
	5,000-9,999			...			
	10,000-14,999			...			
	15,000-19,999			...			
	20,000-24,999	XYZ
	25,000-29,999			...			
	30,000-34,999			...			
	35,000-39,999			...			
	40,000-49,999			...			
	50,000-59,999			...			
	60,000-74,999			...			
	75,000-99,999			...			
	100,000-124,999			...			
	125,000+			...			

Table 2		Proportions of Eligible Households by Income/Size (\$2001)					
		Household Size Categories					
Household Income	Income Ranges	1	2	3	4	5	6+
	0-4,999	1					
	5,000-9,999	1					
	10,000-14,999	...					
	15,000-19,999	...					
	20,000-24,999	e.g., 0.47					
	25,000-29,999	0					
	30,000-34,999	0					
	35,000-39,999	0					
	40,000-49,999	...					
	50,000-59,999	...					
	60,000-74,999	...					
	75,000-99,999	...					
	100,000-124,999	...					
	125,000+	...					

Table 3	Current-Year Distribution of Household Income	
Household Income	Income Ranges	Number of Households
	0-4,999	...
	5,000-9,999	...
	10,000-14,999	...
	15,000-19,999	ABC
	20,000-24,999	...
	25,000-29,999	...
	30,000-34,999	...
	35,000-39,999	...
	40,000-49,999	...
	50,000-59,999	...
	60,000-74,999	...
	75,000-99,999	...
	100,000-124,999	...
	125,000+	...

Table 4	Current-Year Distribution of Household Size					
	Household Size Categories					
	1	2	3	4	5	6+
Number of Households	DEF	...

With these matrices in hand, we use *iterative proportional fitting* to modify the distribution in Table 1 to match the current-year household income and size distributions in Tables 3 and 4, respectively. This means alternately normalizing rows of Table 1 to match Table 3, and columns of Table 1 to match Table 4, repeating the process until the normalizations stop changing the interior cells of (modified) Table 1. The resultant modified table (not explicitly shown here) is the estimated current-year joint distribution of household income and size. Note that this table is adjusted for the change between 1990 and the current year, with respect to household size and household income, while preserving the joint relationship between size and income.

Finally, to achieve the estimated proportion of CARE eligible households, we first multiply each cell of the table containing the estimated current-year joint distribution of household income and size by Table 2 (the table showing the proportions of eligible households for each income/size group). Then, we sum all of the cells to obtain the number of eligible households per million, which can be converted to the demographic eligibility rate for a particular county/utility/commodity (fuel type) or CUC.

How the Matrices Used in the Core Process are Produced

PUMS household records are processed to reflect current-year income (CPI-adjusted), the income categories that are used in the current-year vendor data, and to match the level of household size detail in the vendor data. In the processing of PUMS household income data, we create alternatives with respect to smoothing the reported values. Briefly, we may leave the income data at its reported value and correct it via CPI, or we may address the large number of responses that are given at popular rounded values, using a variety of possible smoothing algorithms. The algorithm chosen for use here lead to more stable results than leaving the data in raw form, and was not significantly different from more extreme smoothing techniques.

PUMS household records are identified at the PUMA level (a geographic level of aggregation equivalent to 100,000 in population). Vendor data is available at the block group level. We use MABLE tables (tables of Census data developed by the Missouri Census Data Center, nationwide), to allocate the data in these files to the block group/zip code level, using standard correspondence table techniques. This places the data in a geographic “least common denominator” that can be flexibly added up to reflect specific geographies pertaining to counties and utilities. Utility records on meter/sub-meter presence were obtained for late spring 2001. These were also disaggregated to the block group/zip code level.

With these disaggregations/allocations completed, we were in a position to aggregate the data to reflect county/block group/zip code combinations in which the utility is present. Various definitions of “presence” are possible in this context. For example, records can be weighted to: 1) reflect the utility meter/sub-meter count in each county/block group/zip code; 2) reflect the simple presence/absence of the utility in the small geography; or, 3) be limited to cases where at least 100 utility meters/sub-meters are found in the relevant zip code. In all cases, it appears that the method is robust under variations on the weighting scheme; we chose to use the utility count as a weight in producing county/utility/commodity-specific tables for Tables 1-4, respectively.

In all, we produce a total of more than 200 unique aggregations of county/utility/commodity (fuel type) for input into the “core process” described above, for both CARE (and LIEE) eligibility, under various eligibility scenarios.

USING THE ESTIMATES

Calculating Eligible Utility-Served Households Per CUC

On a quarterly basis, utilities identify and count technically eligible meters and sub-meters for specific commodities (fuel types) within each of the counties in their territory. The demographic eligibility rates for CARE (and LIEE), produced by the consultant, are multiplied by the quarterly technical eligibility counts to calculate the number of CARE-eligible households (and the slightly larger number of LIEE-eligible households).

Deriving Urban/Rural Shares of CUC Eligibility

For each county/utility/commodity (fuel type), the consultant was asked to provide an estimate of the proportion of eligible households in rural and non-rural locations. Using the technical eligibility data that was provided by the utilities for late spring 2001 and vendor data on the distribution of household size and household income in each California zip code, we disaggregate the total eligibility per CUC to specific CUC/zip code combinations in the utility territory. For each CUC/zip code, the share of CUC eligibility is calculated. Using the Rural Health Council (RHC)/Zipinfo categorization of zip codes, the shares of rural and non-rural zip codes within each CUC are summed to provide a rural/non rural split per CUC. This “split” is also used to allocate eligibility totals per CUC.

Utility or Study-Specific Uses

SDG&E have used the CARE (and LIEE) disaggregations to the zip code level in internal studies of its programs. Also, block group disaggregations of eligibility will be used by the Phase II contractor for the Low Income Residential Needs Assessment Study, as a means of identifying high and low concentrations of program eligibility for onsite sampling purposes.

DOCUMENTATION/STREAMLINING/SENSITIVITY TESTING/VALIDATION

The second phase of the CARE eligibility estimation project will:

1. Complete the documentation for the project.
2. Streamline programs that include investigative portions no longer needed, and make portions of the programming job stream more general.
3. Complete sensitivity tests that were set up during the estimation phase, involving income smoothing alternatives, three different methods of weighting block group/zip records to match CUC's, and an analysis of whether differences between program and Census definitions of household incomes influence eligibility estimates significantly.
4. Extend the validation efforts that were begun in July/August 2002.

Joint-Utility Methodology for Calculating CARE Penetration: Example Distributions

The following tables are examples of the following distributions: a) the joint distribution of household income and size (PUMS); b) the current-year distribution of household income (vendor data); and c) the current-year distribution of household size (vendor data). The PUMS data is for a specific PUMA with income given in current-year (2001) dollars, and the vendor data is for a specific block group. These are the initial tables used prior to beginning the core process.

Table A		Joint Distribution of Household Income and Size (PUMS)					
		Household Size Categories					
Household Income	Income Ranges	1	2	3	4	5	6+
	0-4,999	146	138	78	16	40	18
	5,000-9,999	337	27	0	0	26	0
	10,000-14,999	201	315	49	29	0	53
	15,000-19,999	328	189	102	18	16	0
	20,000-24,999	526	424	82	152	16	34
	25,000-29,999	593	168	88	90	130	0
	30,000-34,999	422	383	135	87	32	99
	35,000-39,999	475	555	159	172	31	26
	40,000-49,999	940	1094	407	442	143	196
	50,000-59,999	913	1215	667	469	73	150
	60,000-74,999	785	2131	823	902	401	204
	75,000-99,999	476	2640	1934	1598	624	255
	100,000-124,999	183	1969	1480	1647	403	319
	125,000+	258	2645	2217	2287	985	522

Table B	Current-Year Distribution of Household Income (Vendor Data)	
Household Income	Income Ranges	Number of Households
	0-4,999	3
	5,000-9,999	9
	10,000-14,999	4
	15,000-19,999	38
	20,000-24,999	19
	25,000-29,999	18
	30,000-34,999	29
	35,000-39,999	29
	40,000-49,999	54
	50,000-59,999	69
	60,000-74,999	87
	75,000-99,999	154
	100,000-124,999	65
	125,000+	28

Table C	Current-Year Distribution of Household Size (Vendor Data)					
	Household Size Categories					
	1	2	3	4	5	6+
Number of Households	129	156	110	113	48	50

Joint-Utility Methodology for Calculating CARE Penetration: Iterative Proportional Fitting

The following excerpt was taken from, The Methods and Materials of Demography condensed version, by Henry S. Shryock and Jacob S. Siegel (Academic Press, 1978). This supplement is intended to provide detailed technical information on iterative proportional fitting. Numbered pages 544-547 of this document demonstrate cases where adjustments of distributions to marginals are required (similar to that described in the 'Core Method' section above); and, numbered pages 547-549 deal, specifically, with iterative proportional fitting as a method for carrying out this adjustment.

Technical Definitions

Technical Eligibility: Indicates that a household has an individual residential meter or qualified sub-meter.

Demographic Eligibility: Indicates that a household satisfies CARE eligibility rules based on household size and income.

Block Group: A subdivision of a census tract (or, in 1990, a block numbering area) that is the smallest geographic unit for which the Census Bureau tabulates 100-percent data. Many blocks correspond to individual city blocks bounded by streets, but blocks – especially in rural areas – may include many square miles and may have some boundaries that are not streets. The Census Bureau established blocks covering the entire nation for the first time in 1990. Previous censuses back to 1940 had blocks established only for part of the nation.

Iterative Proportional Fitting: A standard method used in demography and other sciences when adjustments of distributions to marginals are required.

Data Sources

Key sources

The following identifies primary data sources and provides brief summaries of roles these data played in the analysis/estimation work.

PUMS1990: Source of Cross-Tabulation of Income by Household Size.

The Public Use Microdata Samples are based on long form Census responses by a sample of 5% of Census households. Household income and household size are available in this data set. The PUMAs (geographical areas for PUMS) must be disaggregated to match up with other data sets.

AGS2000, 2001, and 2005 (Vendor Data)

Applied Geographic System's demographic estimates for 2000 and 2005 are available via Tetrad, Inc., which supplies the estimates as part of a geographic information system product. We obtained statewide California data from the "Core Demographic Data" product, purchasing both county/block group level data and zip code level data. AGS is a respected firm sharing the demographic data niche with Claritas, Experian, Acxiom, and other suppliers. AGS data were purchased for Athens Research use, essentially to meet the need originally met by Claritas, which was not purchased by Edison during the recent energy and financial crisis. For most of our work, we used county/block group data from AGS. However, in disaggregating estimates to the zip code level to develop rural/urban splits, zip code data from AGS was applied as well.

Utility Data on Technical Eligibility

From each of the four utilities, we obtained county/zip/commodity (fuel type) level counts of individual residential meters and qualified sub-meters. These data were used, primarily, in conforming AGS data and PUMS data to the utility territory and, secondarily, in providing working estimates of total eligibility once demographic eligibility rates had been estimated. The data were obtained in June and July of 2001 from each of the IOU's.

MABLE Tables

During the 1990's, the Missouri Census Data Center took on the task of creating massive correspondence tables linking various Census and non-Census geographies. From the MABLE tables, we produced tables based on population distribution, household distribution, and acreage for use in linking PUMS data (PUMA level), AGS data (block group or zip level), and utility data (county/zip level) at a "lowest common denominator" county/block group/zip code geography. This linkage allowed re-aggregation of the data for various estimation purposes.

California CPI Data

State DOF data on historical CPI levels was critical to translating 1990 PUMS data into current-year dollars for eligibility estimation purposes.

The Rural Health Council (RHC)/Zipinfo Tables

To identify California zip codes that are rural, we were provided a table developed by the Rural Health Council (RHC), and also obtained a table (from Zipinfo) that implements the “Goldsmith” method of categorizing zip codes. The RHC method required by the CPUC took precedence in the classification, but zip codes not explicitly classified by the RHC are classified using the Goldsmith categorization.

Secondary sources

The following identifies secondary data sources and provides brief summaries of roles these data played in the analysis/estimation work.

Claritas

During the latter 1990’s, Southern California Edison’s method of estimating eligibility involved using changes in the percentage of households that are low income to adjust initial eligibility estimates based on PUMS 1990 data. We have used some recent Claritas data to compare and validate estimates based on the statewide procedure, which for the moment uses Applied Geographic Systems’ current-year estimates.

SCAG

Informal and preliminary validation of estimates, and the AGS data underlying the estimates included SCAG estimates for year 2000 on median household incomes at the county level.

CENSUS Interim Models

Similarly, we have compared county-level estimates to household income estimates produced by the Census for the year 1997, based on modeling work done by Census staff.

HUD Data

We have informally and preliminarily compared our results and the underlying AGS data to HUD county level data on household and family incomes.

ATTACHMENT B

TECHNICAL ADDENDUM: JOINT-UTILITY CARE ELIGIBILITY UPDATE

**Filed in
PG&E's 21st Rapid Deployment Monthly Status Report,
February 21, 2003**

Joint Utility CARE Eligibility Update

In Interim Decision D.02-07-033, Ordering Paragraph 4b, the Commission ordered the following:

“Pacific Gas and Electric Company (PG&E), Southern California Edison Company (SCE), San Diego Gas & Electric Company (SDG&E), and Southern California Gas Company (SoCal), collectively referred to as "the utilities", shall make the following improvements to the methodology adopted in D.01-03-028 for calculating CARE penetration rates:

b. Order and utilize the special tabulations of 2000 Census data as soon as they are available in Fall 2002 to update CARE penetration rates.... As described in this decision, they shall update the number of eligible customers in their service territories using the 2000 Census data required under (b) above with their January, 2003 status report. The report should present a calculation of penetration rates that reflects this updated information and the new enrollments due to automatic enrollment, to date.”

In a subsequent Assigned Commissioner’s Ruling (ACR) issued on December 27, 2002, the Commission modified the directives of Ordering Paragraph 4b of D.02-07-033 as follows, given that special tabulations data were not available as expected:

“The utilities shall include with their February 2003 rapid deployment status reports, due February 21, 2003, updated numbers of CARE-eligible customers in their service territories using 2000 Census data from Summary File 3. The utilities shall include a detailed calculation of the updated penetration rates, along with a narrative describing any differences between the updated and current penetration rates.”

Accordingly, the following discussion explains the differences between the 2001 penetration rate estimates and the updated (2002) penetration rate estimates filed with the February 2003 Rapid Deployment status reports. The updated estimates rely on demographic eligibility proportions that incorporate SF3 block group level data describing the year 2000 distribution of 1999 incomes, with implicit adjustments for CPI changes between 1999 and 2002.

DISCUSSION

Using the Joint Utility CARE methodology for estimating demographic eligibility adopted in D.01-03-028, the utilities have updated the CARE eligibility and penetration rate estimates. The results of this update are filed with each utility's respective February 2003 Rapid Deployment status report. Differences in data used for the 2001 and 2002 estimates are detailed below, along with an explanation for the differences in observed penetration rates between the two years.

Data Differences

The Joint Utility Methodology for estimating CARE penetration is designed to use current-year estimates of household income and household size obtained from a respected data vendor to estimate eligibility. In 2001, the utilities used 2001 estimates of household size and household income obtained from Applied Geographic Systems (AGS) to estimate demographic eligibility (the proportion of all customers within a given utility service area who satisfy the household size and income criteria for the CARE program). The utilities applied these demographic eligibility estimates to counts of technically eligible meters and sub-meters (counts of the number of customers with a qualified meter or sub-meter) to determine the estimated number of customers who are both demographically and technically eligible for CARE. This information is then used to calculate the estimated penetration rate by utility, commodity (fuel type), and county.¹ Per the December 27, 2002 ACR, the Commission ordered the utilities to use Census SF3 Income data to update the CARE estimates for 2002. Given that Census data is based on 1999 reported incomes, this means that the updated eligibility estimates filed herein are developed using current-year (2002) estimates of household size obtained from AGS and an implicitly adjusted 1999 distribution of household income obtained from Census SF3 income data.

While the most ideal circumstance would have been to use current-year (2002) vendor data that incorporated Census SF3 income data,² this data was not available from data vendors. However, the current-year (2002) estimates produced using Census SF3 income data, as required by the Commission, do provide reasonable estimates of eligibility throughout the state and make use of the most current Census information made available to date. Thus, these estimates reasonably can be used as an indication of the utilities' progress in enrolling all customers that are willing to participate in CARE. Essentially, for each utility, fuel type, and county, block group data are aggregated to provide a current-year (2002) estimate of the household size distribution, and a current-year estimate of the household income distribution. These are used to develop an adjusted household size by household income *matrix* estimated for the current year. Note that, in compliance with the ACR dated December 27, 2002, the current-year estimate of the household income distribution assumes no changes since 1999 in the shape of the real income distribution – only moderate changes in the number of households existing in these block groups. It would be preferable to proceed with future estimates using small area estimates (from data vendors) that incorporate 1999 income distributions (from the 2000 Census), CPI changes, and real income distribution changes

tracked by demographic data vendors, rather than implicitly accepting a real income distribution from 1999 as per our necessary response to the December 27th ACR.

Differences in Estimated Eligibility

Sensitivity analyses conducted informally after the utilities completed their annual update of CARE eligibility estimates in July 2002,³ indicated that roughly 90% of the increase in eligibility (from 2001 to the July 2002 estimates) is due to changes in vendor data; and, roughly 10% of the increase in eligibility is due to the relative aggressiveness of the increase in CARE guidelines for 2002. Consider, first, the portion of the increase due to changes in vendor data.

The Joint Utility methodology for estimating CARE eligibility makes use of current-year demographic data obtained from data vendors such as AGS or Claritas.⁴ These are respectable firms that provide demographic data of all types that are used in many applications. However, given that, in 2001, we were in the 12th intercensal year (the time between different Censuses when no new demographic data is available), the utilities were aware that differences could have emerged in estimates of household income distributions between data firms as well as between what the data vendors estimate and what would be shown in Census 2000 results. As such, the utilities recommended conducting sensitivity analyses to see the impact of using estimates of current-year (2001) household income and household size distributions obtained from one data vendor compared to another. The objective would have been to forewarn any potential changes that might be forthcoming once vendors adjusted their estimates of household income and household size distributions as they incorporated data from Census 2000. The Commission later ruled, in D.02-07-033, that these tests were not warranted given that the data vendor selected was a respected firm.

We have since learned through simple data analyses that AGS had a more optimistic view of household income distributions in 2001 than did Claritas and the 2000 Census data. Accordingly, using Census SF3 data to estimate eligibility results in a marked increase in eligibility than what was estimated in 2001.⁵ The utilities caution, however, against concluding that the decision to use data on household income and household size distributions obtained from vendor incorporation of Census 2000 and more recent economic data is a mistake. Rather, the key point is to realize that whenever we are in the intercensal period, no matter which vendor is used, estimates of household income and household size distributions can be expected to deviate somewhat from actual realities simply because sufficient data is not available to derive more accurate estimates. After data vendors incorporate all of the detailed Census 2000 data (*i.e.*, once data vendors fully incorporate all higher-order Census 2000 data and Census SF3 income data and use this data to derive current-year estimates of household income and household size distributions for 2003 and beyond), we can expect more consistent estimates of these distributions for use in future updates. As time continues and we enter the next intercensal period, once again, we will see a divergence in the estimated distributions between vendor firms until the next Census is completed and made publicly available. However, such divergences will be lessened to the extent that more interim

Census products like the American Community Survey are available to demographic vendors than in previous decades.

With respect to the portion of the increase due to changes in the eligibility guidelines, the Joint Utility Methodology incorporates the current-year's mid-year Consumer Price Index (CPI) estimate obtained from the California Department of Finance in estimating demographic eligibility rates. The California CPI was specifically used so that changes in eligibility would reflect changes in California realities – the task of an empirical effort. In contrast, the growth factor that the Commission applied to the eligibility guidelines for 2002 was based on a lagged change in the *national* CPI. For the period in question, the changes that occurred nationally were greater than the changes that occurred in California; therefore, CARE guidelines were increased more aggressively than the corresponding change in California incomes. As such, more individuals qualify for CARE in 2002 than otherwise would have, had the growth factor applied to eligibility guidelines been based on changes in the California CPI.⁶ This difference in growth factors used (and, thus, the consequent aggressiveness of the increase in CARE guidelines) accounts for about 10% of the increase in eligibility observed between 2001 and 2002.

ATTACHMENT C

CARE Leveraging and Outreach Initiatives

Attachment C: CARE Leveraging and Outreach Initiatives

CARE Initiative (A)	Summary (B)	Timeline (C)	Status (D)
Leveraging and Outreach			
2006 Outreach & Collateral Development	The CARE outreach team finalized their strategies for 2006 and created specific work plans for various initiatives. The outreach team also made decisions regarding 2006 collateral development	1/1 - 1/30	Completed
2006 Event Development	The CARE outreach team strategized and scheduled outreach events for 2006 throughout PG&E's service area.	1/1 - 1/30	Completed
2006 COC Expansion	CARE worked on expanding its number of Community Outreach Contactors (COCs) in order to reach a wider range of customers in 2006.	1/1 - 1/30	On-Going
New COC Visits	The CARE outreach team conducted training visits with new 2006 COCs. During these visits CARE provided information about the program as well as helpful tools and collateral items.	1/1 - 2/28	Completed
HUD Outreach rollout (Vacaville)	CARE leveraged with the Vacaville Public Housing Authority and initiated a direct mail to their residents. A letter (with a CARE application) from the housing authority was mailed through an objective third party mail house.	1/5 - 1/12	Completed
Admail West Direct Mail (Phase 3) Rollout	CARE sent a direct mail piece consisting of an English/Spanish application, an informative letter and a business reply envelope. This direct mail piece was sent to 350,000 low-income PG&E customer addresses provided by a purchased database.	01/18/06	Completed
POI Direct Mail Rollout	The Previously Over Incomer (POI) initiative targeted FERA customers who may have become eligible for CARE because of the income guidelines change in November 2005.	01/19/06	Completed
Welcome Packets Insert	CARE inserted mini applications into welcome packets that are mailed to new PG&E customers.	1/06 - 12/06	On-Going
CBS/UPN commercial	CARE aired a 30-second commercial on CBS and UPN television for two weeks. The commercial targeted the African American population and consisted of CARE information as well as a testimonial from a satisfied customer.	2/20 - 3/20	Completed
KBLX radio ad	CARE aired radio commercials targeting the African American population on KBLX to inform them about the program.	2/27 - 3/27	Completed
The Observer newspaper rollout	CARE printed an advertisement with an application in the Observer newspaper in Sacramento.	02/16/06	Completed
Pennysaver system wide rollout	CARE marketed in the Pennysaver coupon book. CARE issued a two page ad with an application provided. This initiative was coded "PS" to track the effectiveness of the coupon book. The campaign ran in all PG&E counties.	2/22 - 3/29	Completed
CARE Recertification Reminder on bill	CARE posted a recertification reminder on the outer envelope of residential customer bills.	3/1 - 3/31	Completed
COC Visits	The CARE outreach team conducted visits with CARE COCs. Outreach strategies were discussed in these meetings and ideas were exchanged.	3/1 - 3/31	Completed
CARE bill insert (Spanish)	CARE inserted a mini application in English and Spanish into all customer bills.	3/1 - 3/31	Completed
HUD rollout (Santa Clara)	CARE leveraged with the Santa Clara Public Housing Authority and initiated a direct mail to their residents. A letter (with a CARE application) from the housing authority was disseminated to tenants.	03/14/06	Completed
Pharmacy rollout	CARE printed information about the program on bags that are distributed to customers at a pharmacy in Oroville. A CARE application was included inside the bags.	03/24/06	Completed
African American television commercials	CARE aired a 30-second CARE commercial targeting African American families. The commercial consisted of CARE information as well as a testimonial from satisfied customers.	3/28 - 4/28	Completed
Senior Magazine rollout	CARE information and applications were printed in the Senior Magazine and distributed to the senior population in Sacramento county.	04/01/06	Completed
Customer Satisfaction Survey	CARE sent out a survey to its customers in order to gage the levels of satisfaction among customers	4/1 - 4/30	Completed
Hispanic Door Hanger drop	Door hanger applications were hung on low-income customers' doors in predominantly Hispanic neighborhoods.	4/1 - 4/30	Completed
Welfare insert rollout	CARE inserted mini applications into mailings to welfare agencies within PG&E's service area.	4/1 - 4/30	Completed
Name Finders direct mail rollout	CARE sent 400,000 direct mail pieces consisting of an application, an informative letter and a business reply envelope. These applications were sent to low-income PG&E customer addresses provided by a purchased database.	4/1 - 4/30	Completed
The Observer newspaper rollout	CARE printed an advertisement with an application in the Observer newspaper in Sacramento.	04/27/06	Completed

CARE Initiative (A)	Summary (B)	Timeline (C)	Status (D)
Minimum Wage Initiative Rollout	CARE distributed coded brochure applications to minimum wage employers for dissemination to their employees.	5/1 - 5/31	Completed
Low-Income Apartment Initiative rollout	CARE distributed coded brochure applications to low-income apartment property managers for dissemination to their tenants.	5/1 - 5/31	Completed
CDX 2 Direct Mail rollout	CARE sent a direct mail piece consisting of an application, an informative letter and a business reply envelope. The direct mail piece was disseminated among PG&E customers whose addresses were provided by an internal database.	5/2 - 5/19	Completed
Door Hanger Direct Mail rollout	CARE sent a door hanger application with a letter describing the program to a purchased customer database.	05/08/06	Completed
Piggybank Direct Mail rollout	CARE sent 50,000 direct mail pieces consisting of an application, an informative letter and a business reply envelope. A picture of a piggybank was featured in order to attract attention to the pieces. The applications were sent to low-income PG&E customers.	05/11/06	Completed
Pennysaver system wide rollout	CARE marketed in the Pennysaver coupon book. CARE issued a two page ad with an application provided. This initiative was coded "PS" to track the effectiveness of the coupon book. The campaign ran in all PG&E counties.	5/13 - 5/24	Completed
HUD rollout (Richmond)	CARE leveraged with the Richmond Public Housing Authority and initiated a direct mail to their residents. A letter (with a CARE application) from the housing authority was disseminated to tenants.	05/15/06	Completed
KBLX radio ad	CARE aired radio commercials targeting the African American population on KBLX to inform them about the program.	5/15 - 5/28	Completed
HUD rollout (Monterey)	CARE leveraged with the Monterey Public Housing Authority and initiated a direct mail to their residents. A letter (with a CARE application) from the housing authority was disseminated to tenants.	05/22/06	Completed
CBS/UPN commercial	CARE aired a 30-second commercial on CBS and UPN television for two weeks. The commercial targeted the African American population and consisted of CARE information as well as a testimonial from a satisfied customer.	5/22 - 6/4	Completed
KVVO radio ad	CARE aired radio commercials targeting the Chinese population on KVVO to inform them about the program.	5/22 - 6/18	Completed
The Observer newspaper rollout	CARE printed an advertisement with a CARE application in the Observer newspaper in Sacramento.	05/26/06	Completed
CARE bill insert (Vietnamese)	CARE inserted a mini application in English and Vietnamese into all customer bills.	5/1 - 5/31	Completed
Customer Satisfaction Survey	CARE sent out a survey to its customers in order to gage the levels of satisfaction among current customers.	6/1 - 6/30	Completed
Employee Involvement Month	CARE leveraged with PG&E employees by asking them to pass on an application to a friend or relative who may qualify for the program. An application was included in all employee paychecks and CARE representatives distributed applications in the general office lobby.	6/1 - 6/30	Completed
Kiosk ADA Replacement	CARE replaced all kiosks in the PG&E local offices with ADA-compliant versions of the kiosks.	6/1 - 6/30	Completed
CARE Recertification Reminder on bill	CARE posted a recertification reminder on the outer envelope of residential customer bills.	6/1 - 6/30	Completed
KBLX radio ad	CARE aired radio commercials targeting the African American population on KBLX to inform them about the program.	6/05 - 6/18	Completed
KVVO radio ad	CARE aired radio commercials targeting the Chinese population on KVVO to inform them about the program.	6/6 - 6/20	Completed
HUD rollout (Merced)	CARE leveraged with the Merced Public Housing Authority and initiated a direct mail to their residents. A letter (with a CARE application) from the housing authority was disseminated to tenants.	06/11/06	Completed
Name Finders Hispanic Direct Mail rollout	CARE sent a direct mail piece consisting of 100,000 applications, an informative letter and a business reply envelope. These applications were sent to low-income Hispanic PG&E customer addresses provided by a purchased database.	06/12/06	Completed
The Observer newspaper rollout	CARE printed an advertisement with a CARE application in the Observer newspaper in Sacramento.	6/19 - 6/25	On-Going
Rural Direct Mail rollout	CARE sent a direct mail piece to 10,000 rural customers within PG&E's service area. Customer addresses were determined via research of postal carrier route data.	06/17/06	Completed
HUD rollout (Merced)	CARE leveraged with the Merced Public Housing Authority and initiated a direct mail to their residents. A letter (with a CARE application) from the housing authority was disseminated to tenants.	07/08/06	Completed
CARE Recertification Reminder on envelope	CARE posted a recertification reminder on the outer envelope of residential customer bills.	7/1 - 7/31	Completed

CARE Initiative (A)	Summary (B)	Timeline (C)	Status (D)
Name Finders Hispanic Direct Mail rollout	CARE mailed a creative direct mail piece consisting of 100,000 applications to low-income Hispanic customer addresses provided by a purchased database.	07/12/06	Completed
Local Office Appreciation Month	CARE held Local Office Appreciation Month in order to recognize the local office staff for their support of the program and efforts to enroll new customers.	8/1 - 8/31	Completed
Name Finders 2 direct mail rollout	CARE mailed a direct mail piece consisting of 400,000 applications, an informative letter and a business reply envelope. These applications were sent to low-income PG&E customer addresses provided by a purchased database.	8/1 - 8/31	Completed
Pennysaver system wide rollout	CARE marketed in the Pennysaver coupon book. CARE issued a two page ad with an application provided. This initiative was coded "PS" to track the effectiveness of the coupon book. The campaign ran in all PG&E counties.	8/7 - 8/14	Completed
CBS/UPN commercial	CARE aired a 30-second commercial on CBS and UPN television for two weeks. The commercial targeted the African American population and consisted of CARE information as well as a testimonial from a satisfied customer.	8/15 - 8/29	Completed
HUD rollout (San Francisco)	CARE leveraged with the San Francisco Public Housing Authority and initiated a direct mail to their residents. A letter (with a CARE application) from the housing authority was disseminated to tenants.	08/17/06	Completed
Headquarters Self-Mailer Direct Mail	CARE sent a direct mail piece consisting of 550,000 visually appealing self-mailers targeted toward specific ethnic groups. These applications were sent to low-income Hispanic, Native American, African American and senior customer addresses provided by a purchased database.	08/20/06	Completed
Pennysaver system wide rollout	CARE marketed in the Pennysaver coupon book. CARE issued a two page ad with an application provided. This initiative was coded "PS" to track the effectiveness of the coupon book. The campaign ran in all PG&E counties.	9/1 - 9/29	Completed
Customer Satisfaction Survey	CARE sent out a survey to its customers in order to be able to gage the levels of satisfaction among CARE customers	9/1 - 9/30	Completed
HUD rollout (Kings)	CARE leveraged with the Kings Public Housing Authority and initiated a direct mail to their residents. A letter (with a CARE application) from the Housing Authority was disseminated to tenants.	09/05/06	Completed
Chinese Direct Mail	CARE sent a creative direct mail piece consisting of 10,000 applications to low-income Chinese customer addresses provided by a purchased database.	09/12/06	Completed
Retail Display Initiative rollout	CARE posted a display of CARE applications in various retail locations.	09/19/06	Completed
Non-profit Direct Mail rollout	CARE sent a direct mail piece consisting of an informative letter and an application to a purchased database of non-profit housing facilities.	09/22/06	Completed
Agricultural Direct Mail rollout	CARE sent a direct mail piece consisting of an informative letter and an application to a purchased database of agricultural facilities.	09/22/06	Completed
Pennysaver system wide rollout	CARE marketed in the Pennysaver coupon book. CARE issued a two page ad with an application provided. This initiative was coded "PS" to track the effectiveness of the coupon book. The campaign ran in all PG&E counties.	10/02 - 10/09	Completed
Namefinders Vietnamese Direct Mail rollout	CARE sent a creative direct mail piece consisting of 13,000 applications to low-income Vietnamese customer addresses provided by a purchased database.	10/12/06	Completed
Re-certification Direct Mail (RDM) rollout	CARE sent a direct mail piece consisting of an informative letter and an application to 70,000 customers who had failed to re-certify for the program.	10/14/06	Completed
HUD rollout (Sacramento)	CARE leveraged with the Sacramento Public Housing Authority and initiated a direct mail to their residents. A letter (with a CARE application) from the housing authority was disseminated to tenants.	11/06/06	Completed
Winter Initiative rollout	CARE leveraged with the PG&E communications department and inserted an application into a packet describing various ways customers could save energy during the winter months. The packet with a CARE application was mailed to 3 million PG&E customers who were not already on the program.	11/20/06	Completed
Customer Satisfaction Survey	CARE sent out a survey in order to gage the levels of satisfaction among the program's customers.	12/1-12/31	Completed
CARE Recertification Reminder on bill	CARE posted a recertification reminder on the outer envelope of residential customer bills.	12/1-12/31	Completed
Presentations			

CARE Initiative (A)	Summary (B)	Timeline (C)	Status (D)
Planned Parenthood Presentation	CARE presented information and distributed applications to the participants of the Planned Parenthood program	1/5/2006	Completed
Albany Senior Center Event	CARE attended an Albany Senior Center event to enroll eligible members of the Albany senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	1/6/2006	Completed
2006 Agency Kick-off Meeting	CARE orchestrated a meeting with its advertising agencies in order to strategize and solidify external outreach plans for 2006.	1/9/2006	Completed
Drum Major for Justice	CARE attended the Drum Major for Justice event in Fresno. CARE distributed collateral items and applications to customers. CARE also aided them in filling out the applications and answered the questions that arose.	1/15/2006	Completed
Sunnyvale Mobile Home Parks Owner/ Manager meeting	CARE presented information to the Sunnyvale Mobile Home Parks Owners and Managers. This information was to be disseminated to their tenants.	1/18/2006	Completed
South Berkeley Senior Center Event	CARE attended the South Berkeley Senior Center event to enroll eligible members of the South Berkeley senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	1/20/2006	Completed
Macdonald Senior Center Event	CARE attended the Macdonald Senior Center event to enroll eligible members of the Richmond senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	1/25/2006	Completed
Vietnamese Spring Festival & Parade	CARE distributed information about the CARE Program and enrolled customers at the Vietnamese Spring Festival and parade in San Jose. CARE increased awareness of the program among the San Jose Vietnamese community.	1/29/2006	Completed
San Ramon Senior Center Event	CARE attended the San Ramon Senior Center event to enroll eligible members of the San Ramon senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	1/30/2006	Completed
Menlo Park Senior Center Event	CARE attended the Menlo Park Senior Center event to enroll eligible members of the Menlo Park senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	2/2/2006	Completed
San Jose Vietnamese TET Festival	CARE distributed information about the CARE Program and enrolled customers at the Vietnamese TET Festival San Jose. CARE increased awareness of the program among the San Jose Vietnamese community.	2/4 - 2/5	Completed
Downtown Oakland Senior Center Event	CARE attended the Downtown Oakland Senior Center event to enroll eligible members of the Oakland senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	2/8/2006	Completed
Newark Community Center Event	CARE attended the Newark Senior Center event to enroll eligible members of the Newark senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	2/9/2006	Completed
North Berkeley Senior Center Event	CARE attended the North Berkeley Senior Center event to enroll eligible members of the Berkeley senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	2/10/2006	Completed
SF Lunar New Year	CARE distributed information about the CARE Program and enrolled customers at the San Francisco Lunar New Year celebration. CARE increase awareness of the program among the San Francisco Chinese community.	2/11 - 2/12	Completed
McBride Senior Center Event	CARE attended the McBride Senior Center event to enroll eligible members of the Vacaville senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	2/14/2006	Completed
Emeryville Senior Center Event	CARE attended the Emeryville Senior Center event to enroll eligible members of the Emeryville senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	2/16/2006	Completed
San Mateo Senior Center Event	CARE attended the San Mateo Senior Center event to enroll eligible members of the San Mateo senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	2/17/2006	Completed
Fairfield Senior Center Event	CARE attended the Fairfield Senior Center event to enroll eligible members of the Fairfield senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	2/18/2006	Completed

CARE Initiative (A)	Summary (B)	Timeline (C)	Status (D)
Mountain View Senior Center Event	CARE attended the Mountain View Senior Center event to enroll eligible members of the Mountain View senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	2/21/2006	Completed
Petaluma Senior Center Event	CARE attended the Petaluma Senior Center event to enroll eligible members of the Petaluma senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	2/23/2006	Completed
Senior Café Event	CARE attended the Senior Café event to enroll eligible members of the Petaluma senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	2/23/2006	Completed
Magnolia Senior Center Event	CARE attended the Magnolia Senior Center event to enroll eligible members of the South San Francisco senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	2/24/2006	Completed
Sacramento Black Expo	CARE distributed information about the CARE Program and enrolled customers at the Sacramento Black Expo. CARE increased awareness of the program among the Sacramento African American community.	2/24/2006	Completed
Kaiser Outreach Presentation	CARE made a presentation about the program at the Kaiser Permanente Conference. Outreach strategies and initiatives were shared with Kaiser Permanente outreach workers.	2/28/2006	Completed
Martinez Senior Center Event	CARE attended the Martinez Senior Center event to enroll eligible members of the Martinez senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	3/2/2006	Completed
Spring Golf Clinic Event	CARE attended the Spring Golf Clinic event to enroll eligible members of the Berkeley senior golf community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	3/4/2006	Completed
CARACEN Dental Clinic Event	CARE distributed information about the CARE Program and enrolled customers at the CARACEN Dental Clinic event. CARE increased awareness of the program among the San Francisco Hispanic community.	3/4/2006	Completed
San Jose Flea Market	CARE distributed information about the CARE Program and enrolled customers at the San Jose Flea Market. CARE increased awareness of the program among the San Jose community.	3/4 - 3/5	Completed
Jewish Senior Center Event	CARE attended the Jewish Senior Center event to enroll eligible members of the San Francisco senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	3/10/2006	Completed
San Pablo Senior Center Event	CARE attended the San Pablo Senior Center event to enroll eligible members of the San Pablo senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	3/14/2006	Completed
Concord Senior Center Event	CARE attended the Concord Senior Center event to enroll eligible members of the Concord senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	3/16/2006	Completed
Livermore Senior Center Event	CARE attended the Livermore Senior Center event to enroll eligible members of the Livermore senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	3/17/2006	Completed
San Leandro Senior Resource Fair	CARE attended the San Leandro Senior Center event to enroll eligible members of the San Leandro senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	3/18/2006	Completed
Chabot Flea Market Event	CARE distributed information about the CARE Program and enrolled customers at the Chabot Flea Market. CARE increased awareness of the program among the Hayward community.	3/18/2006	Completed
Hayward Senior Center Event	CARE attended the Hayward Senior Center event to enroll eligible members of the Hayward senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	3/23/2006	Completed
Mariachi Festival	CARE distributed information about the CARE Program and enrolled customers at the Mariachi Festival. CARE increased awareness of the program among the Fresno Hispanic community.	3/26/2006	Completed
La Quinta Senior Center Event	CARE attended the La Quinta Senior Center event to enroll eligible members of the Redwood City senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	3/24/2006	Completed

CARE Initiative (A)	Summary (B)	Timeline (C)	Status (D)
Los Altos Senior Center Event	CARE attended the Los Altos Senior Center event to enroll eligible members of the Los Altos senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	3/31/2006	Completed
Westlake YMCA -Healthy Kids Day	CARE attended the Westlake YMCA Healthy Kids Day event in Oakland. CARE distributed collateral items and applications to customers. CARE also aided them in filling out the applications and answered the questions that arose.	4/1/2006	Completed
South Berkeley Senior Business Fair	CARE attended the Downtown Oakland Senior Center event to enroll eligible members of the Oakland senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	4/3/2006	Completed
Samuel Pannell Meadowview Senior Center Event	CARE attended the Samuel Pannell Meadowview Senior Center event to enroll eligible members of the Sacramento senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	4/5/2006	Completed
Mexican Heritage Festival	CARE distributed information about the CARE Program and enrolled customers at the Mexican Heritage Festival. CARE increased awareness of the program among the San Jose Hispanic community.	4/6/2006	Completed
School's Out and a Family and Children Resource Fair	CARE distributed information about the CARE Program and enrolled customers at the School's Out and a Family and Children Resource Fair . CARE increased awareness of the program among the Oakland community.	4/7/2006	Completed
Cesar Chavez Celebration	CARE distributed information about the CARE Program and enrolled customers at the Cesar Chavez Celebration. CARE increased awareness of the program among the Modesto Hispanic community.	4/8/2006	Completed
Healthy Kids Day Block Party	CARE distributed information about the CARE Program and enrolled customers at the Healthy Kids Day Block Party. CARE increased awareness of the program among the Concord family community.	4/8/2006	Completed
Richmond Flea Market	CARE distributed information about the CARE Program and enrolled customers at the Richmond Flea Market. CARE increased awareness of the program among the Richmond community.	4/8 - 4/9	Completed
Woolf House Senior Center Event	CARE attended the Woolf House Senior Center event to enroll eligible members of the San Francisco senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	4/11/2006	Completed
Russian American Senior Center Event	CARE attended the Russian American Senior Center event to enroll eligible members of the San Francisco Russian American senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying	4/12/2006	Completed
Oak Park Senior Center Event	CARE attended the Oak Park Senior Center event to enroll eligible members of the San Francisco senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	4/13/2006	Completed
Mendelssohn House Senior Center Event	CARE attended the Mendelssohn House Senior Center event to enroll eligible members of the San Francisco senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	4/14/2006	Completed
1906 Expo Event	CARE distributed information about the CARE Program and enrolled customers at the 1906 Earthquake Exposition Event. CARE increased awareness of the program among the San Francisco community.	4/15 - 4/16	Completed
Contact for Five - Fair	CARE distributed information about the CARE Program and enrolled customers at the Contact for Five Fair. CARE increased awareness of the program among the Concord community.	4/15/2006	Completed
Lady Shaw Senior Center Event	CARE attended the Lady Shaw Senior Center event to enroll eligible members of the San Francisco senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	4/17/2006	Completed
Geen Mun Senior Center Event	CARE attended the Geen Mun Senior Center event to enroll eligible members of the San Francisco senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	4/19/2006	Completed
Imperial Mobile Estate Presentation	CARE presented information and distributed applications to the tenants of the Imperial Mobile Estate Submetered Park.	4/24/2006	Completed

CARE Initiative (A)	Summary (B)	Timeline (C)	Status (D)
Boggs Tract Senior Center Event	CARE attended the Boggs Tract Senior Center event to enroll eligible members of the Stockton senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	4/27/2006	Completed
Summer Youth Job Fair	CARE attended the Summer Youth Job Fair event to enroll eligible members of the San Jose youth community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	4/27/2006	Completed
Hayward Senior Center Event	CARE attended the Hayward Senior Center event to enroll eligible members of the Hayward senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	4/28/2006	Completed
Take Your Family to Work Day	CARE attended the Take your family to work day event to enroll eligible members of the Fresno community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	4/29/2006	Completed
Festival De La Familia	CARE distributed information about the CARE Program and enrolled customers at the Festival de la Familia. CARE increased awareness of the program among the Sacramento Hispanic community.	4/30/2006	Completed
Monterey Senior Center Event	CARE attended the Monterey Senior Center event to enroll eligible members of the Monterey senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	5/5/2006	Completed
Family Fun Day	CARE distributed information about the CARE Program and enrolled customers at the Family Fun Day. CARE increased awareness of the program among the Turlock Hispanic community.	5/6/2006	Completed
Cinco de Mayo	CARE distributed information about the CARE Program and enrolled customers at the Cinco de Mayo. CARE increased awareness of the program among the Santa Barbara Hispanic community.	5/6 - 5/7	Completed
Taft Senior Center Event	CARE attended the Taft Senior Center event to enroll eligible members of the Stockton senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	5/9/2006	Completed
Manilatown Senior Center Event	CARE attended the Manilatown Senior Center event to enroll eligible members of the San Francisco senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	5/11/2006	Completed
Native American Powwow	CARE attended the Native American Powwow event to network and find new avenues of outreach to the Native American community.	5/12 -5/14	Completed
Leo Meyer Senior Center Event	CARE attended the Leo Meyer Senior Center event to enroll eligible members of the King City senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	5/12/2006	Completed
World Journal Fair	CARE distributed information about the program and enrolled customers at the World Journal Fair. CARE increased awareness of the program among the Asian Community.	5/12 -5/14	Completed
Livermore Promise Diversity Celebration	CARE distributed information about the program and enrolled customers at the Livermore Promise Diversity Celebration.	5/13/2006	Completed
2006 Volunteer Center's Human Race	CARE distributed information about the CARE Program and enrolled customers at the 2006 Volunteer Center's Human Race event. CARE also distributed collateral items and answered customer questions regarding applying for CARE.	5/13/2006	Completed
Healthy Living Expo	CARE distributed information about the CARE Program and enrolled customers at the Healthy Living Expo. CARE increased awareness of the program among the Rocklin Community.	5/17/2006	Completed
Las Positas Senior Center Event	CARE attended the Las Positas Senior Center event to enroll eligible members of the San Francisco senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	5/17/2006	Completed
Northeast Senior Center Event	CARE attended the Lady Shaw Senior Center event to enroll eligible members of the San Francisco senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	5/18/3006	Completed
Celebrate Davis Event	CARE distributed information about the program and enrolled eligible customers at the Celebrate Davis event. CARE increased awareness of the program among the Davis Community.	5/18/2006	Completed

CARE Initiative (A)	Summary (B)	Timeline (C)	Status (D)
Vistacion Valley Senior Center Event	CARE attended the Vistacion Valley Senior Center event to enroll eligible members of the Vistacion Valley senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	5/19/2006	Completed
The Road Races and Fun Walk	CARE distributed information about the CARE Program and enrolled eligible customers at the Road Races and Fun Walk Event. CARE increased awareness of the program among the Auburn Community.	5/20/2006	Completed
Axis Community Health Festival	CARE distributed information about the program and enrolled eligible customers at the Axis Community Health Festival. CARE increased awareness of the program among the Livermore Community.	5/20/2006	Completed
Native American Indian Event	CARE distributed information about the CARE Program and enrolled eligible customers at the Native American Indian . CARE increased awareness of the program among the Livermore Community.	5/20/2006	Completed
Asian Heritage Street Celebration	CARE distributed information about the CARE Program and enrolled eligible customers at the Asian Heritage Street Celebration . CARE increased awareness of the program among the San Francisco Community.	5/20/2006	Completed
Hunter's Point Crossing Ceremony	CARE attended the Hunter's Point Crossing Ceremony event in San Francisco. CARE distributed collateral items and applications to customers. CARE also aided them in filling out the applications and answered the questions that arose.	5/23/2006	Completed
Active Living Center Event	CARE attended the Active Living Center Event senior event in Pacific Grove. CARE distributed collateral items and applications to senior customers. CARE also aided them in filling out the applications and answered the questions that arose.	5/24/2006	Completed
Neighbors in Action Event	CARE attended the Neighbors in Action Event in San Francisco. CARE distributed collateral items and applications to customers. CARE also aided them in filling out the applications and answered the questions that arose.	5/25/2006	Completed
Sacramento County Kids Fair	CARE distributed information about the program and enrolled eligible customers at the Sacramento County Kids Fair. CARE increased awareness of the program among the Sacramento.	5/26-5/27	Completed
Carnival SF	CARE attended the Carnival SF event in San Francisco. CARE distributed collateral items and applications to customers. CARE also aided them in filling out the applications and answered the questions that arose.	5/27-5/28	Completed
Stone soul Picnic	CARE attended the Stone soul Picnic event in Hayward. CARE distributed collateral items and applications to customers. CARE also aided them in filling out the applications and answered the questions that arose.	5/29-5/31	Completed
National Health and Fitness Day	CARE attended the National Health and Fitness Day event in Roseville. CARE distributed collateral items and applications to customers. CARE also aided them in filling out the applications and answered the questions that arose.	5/31/2006	Completed
Chinatown Press Conference	CARE representatives discussed CARE and responded to questions at the Chinatown Press Conference.	6/1/2006	Completed
Oakland Press Conference (Centro Legal de la Raza)	CARE representatives discussed CARE and responded to questions at the Oakland Press Conference.	6/2/2006	Completed
Black Expo	CARE attended the Black Expo event in Fresno. CARE distributed collateral items and applications to customers. CARE also networked with businesses and non-profit organizations in order to find new opportunities for CARE outreach.	6/2 - 6/4	Completed
Family Legacy Institute	The CARE Program attended the Family Legacy Institute event in Forest Hill. CARE distributed collateral items and applications to customers. CARE also aided them in filling out the applications and answered the questions that arose.	6/3/2006	Completed
Tamale Festival	CARE distributed information about the program and enrolled eligible customers at the Tamale Festival event. CARE increased awareness of the program among the San Jose Hispanic community.	6/3/2006	Completed
WAV Media Event	CARE distributed information about the CARE Program and enrolled eligible customers at the WAV Media event. CARE increased awareness of the program among the Woodland community.	6/3/2006	Completed
Pista Sa Nayon	CARE distributed information about the CARE Program and enrolled eligible customers at the Pista Sa Nayon event. CARE increased awareness of the program among the Vallejo community.	6/3/2006	Completed
Hart Senior Center Event	CARE attended the Hart Senior Center event to enroll eligible members of the Sacramento senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	6/7/2006	Completed

CARE Initiative (A)	Summary (B)	Timeline (C)	Status (D)
Prunedale Senior Center Event	CARE attended the Prunedale Senior Center event to enroll eligible members of the Salinas senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	6/8/2006	Completed
Russian Outreach Event	CARE attended the Russian Outreach event to enroll eligible members of the Sacramento Russian community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	6/8/2006	Completed
POWWOW for Woman's Health	CARE distributed information about the CARE Program and enrolled customers at the POWWOW for Woman's Health event. CARE increased awareness of the program among the Santa Cruz Community.	6/9/2006	Completed
Harmony Festival	CARE attended the Harmony Festival event to enroll eligible members of the Santa Rosa community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	6/9 - 6/11	Completed
Summer Jam	CARE attended the Summer Jam event to enroll eligible members of the San Francisco community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	6/10/2006	Completed
Big Brother and Sisters Event	CARE attended the Big Brother and Sisters event to enroll eligible members of the Madera community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	6/11/2006	Completed
South Sunset Senior Center Event	CARE attended the South Sunset Senior Center event to enroll eligible members of the San Francisco senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	6/13/2006	Completed
Firebaugh Senior Center Event	CARE attended the Firebaugh Senior Center event to enroll eligible members of the Firebaugh senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	6/16/2006	Completed
Sacramento Juneteenth Event	CARE attended the Sacramento Juneteenth event to enroll eligible members of the Sacramento African American community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	6/17/2006	Completed
Fresno Juneteenth Event	CARE attended the Fresno Juneteenth event to enroll eligible members of the Fresno African American community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	6/17/2006	Completed
San Francisco Juneteenth Event	CARE attended the San Francisco Juneteenth event to enroll eligible members of the San Francisco African American community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	6/17 - 6/18	Completed
Fresno Block Party	CARE attended the Fresno Block Party event to enroll eligible members of the Fresno African American community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	6/24/2006	Completed
Third Annual Diabetes Event	CARE attended the Third Annual Diabetes event to enroll eligible members of the Santa Clara community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	6/24/2006	Completed
Richmond Flea Market	CARE attended the Richmond Flea Market event to enroll eligible members of the Richmond community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	7/1 - 7/2	Completed
Omni Senior Center Event	CARE attended the Omni Senior Center event to enroll eligible members of the San Francisco senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	7/6/2006	Completed
Mid-Bay Emergency Food and Referral	CARE attended the Mid-Bay Emergency Food and Referral event to enroll eligible members of the Castroville community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	7/6/2006	Completed
Healthy Living Festival	CARE attended the Healthy Living Festival event to enroll eligible members of the Hayward community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	7/7/2006	Completed

CARE Initiative (A)	Summary (B)	Timeline (C)	Status (D)
National Park Fun Day	CARE attended the National Park Fun Day event to enroll eligible members of the Fresno community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	7/8/2006	Completed
Food Giveaway Event	CARE attended the Food Giveaway event to enroll eligible members of the San Leandro community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	7/12/2006	Completed
Affordable Housing Fair	CARE attended the Affordable Housing Fair event to enroll eligible members of the Union City community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	7/15/2006	Completed
Black Expo	CARE attended the Black Expo event to enroll eligible members of the Oakland African American community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	7/15 - 7/16	Completed
Korean Senior Center Event	CARE attended the Korean Senior Center event to enroll eligible members of the San Francisco senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	7/21/2006	Completed
Urban Fest	CARE attended the Urban Fest event to enroll eligible members of the Oakland African American community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	7/22/2006	Completed
Coalinga Senior Center Event	CARE attended the Coalinga Senior Center event to enroll eligible members of the Coalinga senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	7/28/2006	Completed
The Collard Green Cultural Festival	CARE attended the Collard Green Cultural Festival event to enroll eligible members of the Oakland African American community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	7/29/2006	Completed
Berkeley Jazz Festival	CARE attended the Berkeley Jazz Festival event to enroll eligible members of the Berkeley community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	7/29/2006	Completed
Annual Cantaloupe Roundup	CARE attended the Annual Cantaloupe Roundup event to enroll eligible members of the Firebaugh community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	7/29/2006	Completed
SF Connect Launch Party	CARE attended the SF Connect Launch Party event to enroll eligible members of the San Francisco community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	8/1/2006	Completed
Jackie Chen Senior Center Event	CARE attended the Jackie Chen Senior Center event to enroll eligible members of the San Francisco senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	8/4/2006	Completed
Chinese Night Market	CARE attended the Chinese Night Market event to enroll eligible members of the San Francisco senior Asian community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	8/5/2006	Completed
Self-Help for the Elderly	CARE attended the Self-Help for the Elderly event to enroll eligible members of the San Francisco community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	8/5 - 8/6	Completed
Mission Neighborhood Event	CARE attended the Mission Neighborhood event to enroll eligible members of the San Francisco community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	8/9/2006	Completed
California State Fair	CARE attended the California State Fair event to enroll eligible members of the Sacramento community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	8/11 - 9/4	Completed
Friends of Faith Event	CARE attended the Friends of Faith event to enroll eligible members of the Oakland community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	8/12/2006	Completed

CARE Initiative (A)	Summary (B)	Timeline (C)	Status (D)
Third Annual Basketball Tournament and Festival	CARE attended the Third Annual Basketball Tournament and Festival event to enroll eligible members of the San Francisco community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for the program.	8/12/2006	Completed
Iglesia Adventista del Septimo Dia	CARE attended the Iglesia Adventista del Septimo Dia event to enroll eligible customers in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for the program.	8/13/2006	Completed
San Jose Southside Senior Center Event	CARE distributed information about the program and enrolled eligible customers at the San Jose Southside Senior Center event. CARE increased awareness of the program among the San Jose senior community.	8/17/2006	Completed
Music in the Park	CARE attended the Music in the Park event to enroll eligible members of the San Jose community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	8/17/2006	Completed
Yolo County Fair	CARE distributed information about the program and enrolled eligible customers at the Yolo County Fair event. CARE increased awareness of the program among the Yolo county community.	8/18 - 8/20	Completed
Southeast Asian Youth Leadership Conference	CARE attended the Southeast Asian Youth Leadership Conference to enroll eligible members of the Clovis Asian community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	8/19/2006	Completed
Kirk Senior Program	CARE distributed information about the program and enrolled eligible customers at the Kirk Senior Program event. CARE increased awareness of the program among the San Jose senior community.	8/23/2006	Completed
3rd Annual Basketball Tournament and Festival 2	CARE attended the 3rd Annual Basketball Tournament and Festival to enroll eligible members of the San Francisco community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for the program.	8/26/2006	Completed
BMAGIC Backpack Celebration	CARE distributed information about the program and enrolled eligible customers at the BMAGIC Backpack Celebration event. CARE increased awareness of the program among the San Francisco community.	8/26/2006	Completed
Smart and Final Campaign Kick-off	CARE attended the Smart and Final Campaign Kick-off to enroll eligible members of the Oakland community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	8/26/2006	Completed
Oakland Chinese Street Festival	CARE distributed information about the program and enrolled eligible customers at the Oakland Chinese Street Festival event. CARE increased awareness of the program among the Oakland Chinese community.	8/26 - 8/27	Completed
Dia Del Campesino	CARE attended the Dia Del Campesino event to enroll eligible members of the Stockton community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for the program.	8/27/2006	Completed
Cathay Post	CARE distributed information about the program and enrolled eligible customers at the Cathay Post event. CARE increased awareness of the program among the San Francisco community.	8/27/2006	Completed
Empress of China Event	CARE attended the Empress of China event to enroll eligible members of the San Francisco community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for the program.	8/27/2006	Completed
Heritage Day 2006 Celebration	CARE distributed information about the program and enrolled eligible customers at the Heritage Day 2006 Celebration event. CARE increased awareness of the program among the San Jose community.	8/27/2006	Completed
Jewish Community Center	CARE attended the Jewish Community Center event to enroll eligible members of the Walnut Creek Jewish community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for the program.	9/7/2006	Completed
RecConnect Grand Opening	CARE attended the RecConnect Grand Opening to enroll eligible members of the San Francisco community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for the program.	9/9/2006	Completed
SF HA Potrero Hill Street Event	CARE distributed information about the program and enrolled eligible customers at the SF HA Potrero Hill Street Event. CARE increased awareness of the program among the San Francisco community.	9/9/2006	Completed

CARE Initiative (A)	Summary (B)	Timeline (C)	Status (D)
Tracy Dry Bean Festival	CARE attended the Tracy Dry Bean Festival event to enroll eligible members of the Tracy community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for the program.	9/9 - 9/10	Completed
Castro Valley Fall Festival	CARE distributed information about the program and enrolled eligible customers at the Castro Valley Fall Festival. CARE increased awareness of the program among the Castro Valley community.	9/9 - 9/10	Completed
Viva Mexico	CARE attended the Viva Mexico event to enroll eligible members of the Bakersfield community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	9/10/2006	Completed
VBOOM Street Fair	CARE distributed information about the program and enrolled eligible customers at the VBOOM Street Fair. CARE increased awareness of the program among the San Francisco community.	9/10/2006	Completed
San Ramon Senior Center Event	CARE attended the San Ramon Senior Center event to enroll eligible members of the San Ramon senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	9/11/2006	Completed
Glen Agnes Community Center Event	CARE attended the Glen Agnes Community Center Event to enroll eligible members of the Fresno community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for the program.	9/12/2006	Completed
Daly City Community Meeting	CARE attended the Daly City Community Meeting to enroll eligible members of the Daly City community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for the program.	9/13/2006	Completed
North County Fair	CARE distributed information about the program and enrolled eligible customers at the North County Fair. CARE increased awareness of the program among the Arcata Community.	9/16 - 9/17	Completed
Walk for Education	CARE attended the Walk for Education event to enroll eligible members of the Oakland community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for the program.	9/16/2006	Completed
5th Annual North Fair Oaks Community Festival	CARE distributed information about the program and enrolled eligible customers at the 5th Annual North Fair Oaks Community Festival. CARE increased awareness of the program among the Redwood City community.	9/17/2006	Completed
Day on the Glen	CARE attended the Day on the Glen event to enroll eligible members of the Dublin community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for the program.	9/16 - 9/17	Completed
Presentation in Woodland	CARE presented at the Woodland event to enroll eligible members of the Woodland community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for the program.	9/21/2006	Completed
Autumn Moon Festival	CARE distributed information about the program and enrolled eligible customers at the Autumn Moon Festival. CARE increased awareness of the program among the San Francisco community.	9/23 - 9/24	Completed
Dragon Boat Festival	CARE attended the Dragon Boat Festival event to enroll eligible members of the San Francisco community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for the program.	9/23 - 9/24	Completed
Learning to Live in America	CARE distributed information about the program and enrolled eligible customers at the Learning to Live in America event. CARE increased awareness of the program among the Sacramento Community.	9/24/2006	Completed
Pleasanton Senior Center Event	CARE attended the Pleasanton Senior Center event to enroll eligible members of the Pleasanton senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for the program.	9/25/2006	Completed
San Bruno Street Event	CARE distributed information about the program and enrolled eligible customers at the San Bruno Street event. CARE increased awareness of the program among the San Bruno community.	9/30/2006	Completed
2006 Sunset Community Festival	CARE attended the 2006 Sunset Community Festival to enroll eligible members of the San Francisco community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for the program.	9/30/2006	Completed
UC Davis College Event	CARE distributed information about the program and enrolled customers at the UC Davis College Event. CARE increased awareness of the program among the Davis community.	10/5/2006	Completed

CARE Initiative (A)	Summary (B)	Timeline (C)	Status (D)
Family Fun Day in Turlock	CARE attended the Family Fun Day event in Turlock. CARE distributed collateral items and applications to customers. CARE also aided them in filling out the applications and answered the questions that arose.	10/7/2006	Completed
Sacramento Neighbors' Fair	CARE distributed information about the program and enrolled customers at the Sacramento Neighbors' Fair. CARE increased awareness of the program among the Sacramento community.	10/7/2006	Completed
2006 Hoop There It Is	CARE attended the 2006 Hoop There It Is event to enroll eligible members of the Santa Clara community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for the program.	10/7/2006	Completed
Mariachi Festival	CARE distributed information about the program and enrolled customers at the Mariachi Festival. CARE increased awareness of the program among the San Jose community.	10/8/2006	Completed
Black White and Red Festival	CARE attended the Black White and Red Festival event to enroll eligible members of the San Francisco community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for the program.	10/13/2006	Completed
Energy Fair	CARE distributed information about the program and enrolled customers at the Energy Fair. CARE increased awareness of the program among the Quincy community.	10/14/2006	Completed
Migrant Conference	CARE attended the Migrant Conference event to enroll eligible members of the Fresno community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for the program.	10/14/2006	Completed
Monterey Bay Aquarium	CARE distributed information about the program and enrolled customers at the Monterey Bay Aquarium event. CARE increased awareness of the program among the Monterey community.	10/15/2006	Completed
Bernal Heights Fiesta on the Hill	CARE attended the Bernal Heights Fiesta on the Hill event to enroll eligible members of the San Francisco community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for the program.	10/15/2006	Completed
Seniors on the Move	CARE distributed information about the program and enrolled customers at the Seniors on the Move event. CARE increased awareness of the program among the South San Francisco community.	10/16/2006	Completed
Greenville Energy Fair	CARE attended the Greenville Energy Fair event to enroll eligible members of the Greenville community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for the program.	10/21/2006	Completed
San Jose Flea Market	CARE distributed information about the program and enrolled customers at the San Jose Flea Market. CARE increased awareness of the program among the San Jose community.	10/21 - 10/22	Completed
CARA Convention	CARE attended the CARA Convention event to enroll eligible members of the San Jose senior community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	10/26 - 10/27	Completed
NAACP 19th Annual Convention	CARE distributed information about the program and enrolled customers at the NAACP 19th Annual Convention. CARE increased awareness of the program among the Oakland community.	10/28 - 10/29	Completed
Native American Heritage Day	CARE distributed information about the program and enrolled customers at the Native American Heritage Day. CARE increased awareness of the program among the San Jose community.	11/2/2006	Completed
Woman's Building celebration of crafting	CARE attended the Women's Building celebration of crafting event to enroll eligible members of the San Francisco community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	11/25 - 11/26	Completed
Holiday Kwanzaa Gift Show 2006	CARE distributed information about the program and enrolled customers at the Native American Heritage Day. CARE increased awareness of the program among the San Jose Native American community.	12/2-12/3	Completed
Mission YMCA	CARE attended the Mission YMCA event to enroll eligible members of the San Francisco community in the program. CARE distributed applications and collateral items and answered customer questions regarding applying for CARE.	12/13/06	Completed
Hmong International New Year	CARE distributed information about the program and enrolled customers at Hmong International New Year event. CARE increased awareness of the program among in the community.	12/15-12/18	Completed
Beth Eden Church	CARE distributed information about the program and enrolled customers at the Beth Eden Church event. CARE increased awareness of the program among the Oakland community.	12/16/06	Completed

CARE Initiative (A)	Summary (B)	Timeline (C)	Status (D)
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Abbreviations

CARE - California Alternate Rates for Energy
LIEE - Low Income Energy Efficiency Program
EP - Energy partners (PG&E's LIEE Program)
SIRS - Sons in Retirement
RCP - Residential Contractor Program
CFL - Compact Fluorescent Light
HEAP - Home Energy Assistance Program (federal program)
REACH - PG&E bill assistance program administered by the Salvation Army
CSD - CA State Dept of Community Services and Development