



**Pacific Gas and  
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February 22, 2006

**HAND DELIVERY**

Docket Clerk  
Docket office  
Public Utilities Commission  
of the State of California  
505 Van Ness Avenue, Room 2001  
San Francisco, CA 94102

Re: R.04-01-006 - Order Instituting Rulemaking on Commission's Proposed Policies  
and Programs Governing Post-2003 Low-Income Assistance Programs

Dear Docket Clerk:

Enclosed for filing in the above-captioned matter are an original and five (5) copies of

**FIFTY-SEVENTH STATUS REPORT  
OF PACIFIC GAS AND ELECTRIC COMPANY (U 39 M)  
ON THE RESULTS OF ITS LOW INCOME ENERGY EFFICIENCY AND CARE PROGRAM  
EFFORTS IN COMPLIANCE WITH ORDERING PARAGRAPH  
17 OF DECISION 01-05-033, ISSUED MAY 7, 2001**

Please file the original document, date-stamp a copy, and return the endorsed copy in the stamped, self-addressed envelope provided for this purpose.

Very truly yours,



Chonda J. Nwamu

CJN/pak

cc: Steven A. Weissman, ALJ  
Dian Grueneich, Commissioner  
Susan E. Brown, LIF  
Mariana C. Campbell, ORA  
Hazlyn Fortune, ORA  
Sarita Sarvate, ED  
Donna L. Wagner, ED  
Josie Webb, ED  
All Parties on Official Service List for R.04-01-006

**BEFORE THE PUBLIC UTILITIES COMMISSION OF THE  
STATE OF CALIFORNIA**

Order Instituting Rulemaking on the Commission's  
Proposed Policies and Programs Governing Post-2003  
Low-Income Assistance Programs.

Rulemaking 04-01-006  
(Issued January 8, 2004)

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17 OF DECISION 01-05-033, ISSUED MAY 7, 2001**

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Attorneys for:  
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Dated: February 22, 2006

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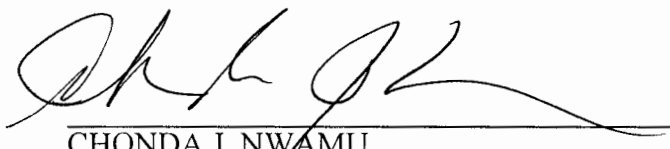
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In accordance with Ordering Paragraph 17 of Decision 01-05-033, the direction of Administrative Law Judge Gottstein at the July 11 and 28, 2001, status conferences, and the agreements reached between the utilities and the Energy Division on the format and content of the tables, Pacific Gas and Electric Company submits its attached fifty-seventh monthly status report on the results of its Low Income Energy Efficiency and CARE Program efforts, showing results through January 2006.

Also included in today's filing is a complete set of year-end 2005 tables which update PG&E's Plan Year 2005 totals. These year-end 2005 tables supersede data reported in previous reports.

Respectfully submitted,

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February 22, 2006

## **PG&E Low Income Programs Monthly Report For January 2006 and End-Of-Year 2005**

This Low Income Programs Monthly Report complies with Ordering Paragraphs 14 and 17 of Decision (D.) 01-05-033, requiring the utilities to comply with reporting and program evaluation requirements previously established for the California Alternate Rates for Energy (CARE) and Low Income Energy Efficiency (LIEE) programs, including the reporting of costs and effects from these programs on an annual basis using the Reporting Requirements Manual. Reporting categories are consistent with the definitions contained in the Reporting Requirements Manual, filed January 10, 2002. Additionally, utilities are required to file regular monthly status reports on the results of their Low Income Programs.

A complete listing of the Low Income Programs Reporting Tables is included in Attachment A to this report. The full report (including selected tables 1-30 and Leveraging Tables A-C) is required quarterly, in the months of February, May, August and November. The tables required monthly include: Tables 1, 4, 6, 10, 11, 11A, 11B, and 16. An End-of-Year Report for the previous year is required in February.

### **Monthly Low Income Programs Reporting**

This Low Income Programs Report includes actual LIEE and CARE results and expenditures for January 2006 and an End-of-Year Report for 2005. ***All results reported in this monthly report update and supersede data reported in previous reports.***

**2005 Reporting.** PG&E is using the most recent measure energy savings by climate zone developed in the Joint Utility 2001 LIEE Program Evaluation and the Standardization Team's Cost Effectiveness Report.

Beginning in October 2004, PG&E began to report California Department of Community Services and Development (CSD) Automatic Enrollment results per the Assigned Commissioner's Ruling (ACR) establishing provisions for CARE Automatic Enrollment, dated May 5, 2004. Automatic Enrollment expenditures are reported as a line item in Table 6. PG&E, San Diego Gas and Electric Company, Southern California Edison Company, and Southern California Gas Company developed Table 10.1 to fulfill the ACR's other automatic enrollment reporting criteria. Table 10.1 is filed as part of PG&E's regular quarterly Low Income Programs reports.

**Customer Eligibility.** In March 2003, the Joint Utilities updated and revised the penetration rate calculation methodology in compliance with D.02-07-033 and ACR 12/27/02, as described in previous reports.<sup>1</sup>

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<sup>1</sup> The *Joint Utility Methodology for Calculating CARE Penetration* (February 6, 2002) and the *Joint Utility CARE Eligibility Update* (February 21, 2003) can be found as Attachments A and B in PG&E's *Sixteenth Annual Progress Report to the California Public Utilities Commission on the California Alternate Rates for Energy (CARE) Program, January 1, 2004-December 31, 2004*, submitted May 2, 2005.

The Joint Utilities updated their annual customer eligibility estimations as required in a June 24, 2004 Commission Scoping Memo and filed these new annual estimates of CARE-eligible customers on October 15, 2004. Revised estimates were filed on December 28, 2004. These estimates were being used by the Joint Utilities in their 2005 filings until D.05-10-044 directed that low income customer eligibility be increased for both CARE and LIEE .

D.05-10-044 mandated that eligibility criteria for CARE and LIEE be changed from 175 percent of Federal Poverty Guidelines (and 200 percent for LIEE seniors and disabled) to 200 percent FPG for all residential customers. This became effective immediately. Since D.05-10-044 was adopted on October 27, 2005, PG&E updated its reporting tables to reflect this change in the December 21, 2005 report for November 2005 results. As a result of this demographic adjustment, the estimated CARE and LIEE-eligible population in PG&E's service territory have both increased. PG&E's CARE and LIEE penetration rates have decreased and are thus not comparable to penetration rates reported before November 2005.

**Low Income Winter Initiatives.** On October 27, 2005, D.05-10-044 approved various emergency program changes in light of anticipated high natural gas prices in the winter of 2005-2006. For the low income programs, these winter initiatives will:

1. Revise LIEE and CARE income eligibility criteria to 200 percent of FPG for all customers.
2. Hold harmless from repayment any customer receiving LIEE or CARE program benefits even if customer is later found to not qualify based on income.
3. Replace central gas forced air furnaces to renters and homeowners as part of a whole-house effort where an existing furnace has an AFUE of 65 or lower.
4. Perform necessary duct work when installing a new furnace.
5. Replace leaky water heaters.
6. Increase new refrigerator replacements through go-backs and other initiatives.
7. Implement telephone enrollment for CARE.
8. Suspend dropping CARE customers for recertification or post-enrollment verification failures.

These activities are tracked on the current reporting tables in this report. Refrigerators, furnaces and water heaters are already broken out as line items for LIEE measure reporting tables, and readers will notice an increased level of activity for these measures over the winter months. For example:

- PG&E treated 16,367 customer homes between November 1, 2005 and January 23, 2006, compared to 10,595 customer homes treated during the same period last winter

- 177 inefficient furnaces have been replaced since November 1, and another 281 are identified for replacement; 33 leaky water heaters have been replaced since November 1, and another 26 are identified for replacement; and 5,485 refrigerators have been replaced since November 1, with 4,703 more identified for replacement.

Greater public awareness of the CARE program brought about by intensive media coverage of the high winter gas prices is already contributing to increasing enrollment. 125,545 new CARE customers were enrolled between November 2005 and January 2006. This marks a net increase of 59,514 customers from the same time frame the previous year. PG&E is also launching outreach initiatives specifically directed to newly eligible customers.

**2006 Reporting.** D.05-12-026 authorized PG&E's CARE and LIEE programs and budgets for 2006. CARE and LIEE 2006 budgets remain the same as the 2005 budgets (CARE administration: \$7.457 million; and LIEE: \$56.530 million plus previous unspent carryover). In recognition of potential added costs of the Winter Initiative and increases to the number of qualifying customers eligible for the programs through D.05-10-044's income eligibility increase, the utilities are required to file a 2006 budget augmentation no later than April 14, 2006. There are no changes to the 2006 reporting tables.

### **Low Income Program Highlights**

**CARE Automatic Enrollment.** In October and November 2003, PG&E began to exchange data regarding low income qualified customers with the Turlock and Modesto Irrigation Districts (TID and MID). PG&E provides natural gas in the TID and MID electric service areas. PG&E automatically enrolls qualified low income customers served by the two irrigation districts into CARE. PG&E also provides CARE customer data on shared customers to TID and MID so that these customers can be enrolled in their programs.

PG&E is currently in discussion with the Sacramento Municipal Utility District (SMUD) about exchanging data to automatically enroll low income qualifying SMUD customers that receive gas service from PG&E. PG&E currently exchanges data with Southern California Electric Company and Southern California Gas Company to automatically enroll their CARE customers who also receive PG&E service.

On May 5, 2004, the ACR on Automatic Enrollment authorized that Automatic Enrollment between the utilities and CSD be implemented. A total of 3,261 CSD customers were automatically enrolled in PG&E's CARE program in 2005. PG&E received one 2005 file of CSD Automatic Enrollment customers from Energy Division at the end of July. Of the 40,488 Low Income Energy Assistance Program (LIHEAP) customer records provided, 4,142 had non-active or ineligible PG&E accounts and 32,364 customers were already on PG&E's CARE rate. In early August, PG&E mailed Commission-authorized opt-out letters to the remaining 3,982 active non-CARE

accounts. At the end of the 30-day waiting period, no customers had opted out, 437 had enrolled in CARE through other sources, and 284 accounts became ineligible. The remaining 3,261 customers were automatically enrolled in CARE.

D.05-04-052 ordered the utilities to create a new application for migrant farm worker housing centers (MFHCs), and to use their best efforts to begin to enroll all residents of these California Office of Migrant Services (OMS) and other non-profit managed migrant centers into the CARE program, in compliance with Assembly Bill 868. PG&E has worked with the other utilities to consistently revise its agricultural housing CARE applications and has filed its new MFHC and revised agricultural housing applications by advice letter filing with the Commission. PG&E has already automatically enrolled the 22 OMS centers in its service area with the new MFHC application. Additionally, PG&E is working in the community to seek and enroll any other qualifying non-profit-run MFHCs.

**LIEE Leveraging.** Currently, PG&E has contracts with LIHEAP agencies that are not working in PG&E's LIEE program. PG&E is leveraging with these LIHEAP agencies to install PG&E Energy Star refrigerators in PG&E electric homes where the LIHEAP contractors have installed all other measures under the State Weatherization Program.

PG&E provides a list of all residential customers to the contractors. From this list, the contractors can tell if the customer is on the CARE rate and if they have received LIEE services in the past. With this information, the contractors are better able to market to the community, e.g., contacting only those customers who have not received LIEE services in the past.

On a daily basis, contractors are provided information about customers who have requested LIEE services (referrals). Each home that receives LIEE services where the customer is not on the CARE rate is then signed up for the CARE discount. This month 121 LIEE participants were enrolled in CARE.

LIEE program materials are provided in seven languages: English; Spanish; Vietnamese; Chinese; Russian; Korean; and Hmong.

In addition, PG&E continues to combine its LIEE and CARE outreach activities in order to leverage low income outreach efforts and provide PG&E low income customers with the knowledge and tools to access all of PG&E's free energy services.

**Attachment A**  
**Low Income Assistance Programs Quarterly Reporting Tables**

**Table A** – LIEE Leveraging and Outreach Initiatives – Columns are: A) LIEE Initiative; B) Summary; C) Timeline; and D) Status

**Table B** – CARE Leveraging and Outreach Initiatives – Columns are: A) CARE Initiative; B) Summary; C) Timeline; and D) Status

**Table C** – CARE Advertising – Columns are: A) Advertising Initiative; B) Summary; C) Timeline; and D) Status

**Table 1** – LIEE Program Expenses

**Table 2** – LIEE Installation Contractor Expenses

**Table 2A** – LIEE Direct Purchase and Installation Contractor Legend

**Table 3** – LIEE SBX1-5 Percentage of Expenditures for Direct Purchases and Administration  
No longer reported

**Table 4** – LIEE Measure Installations

**Table 4A** – LIEE Homes Treated by Dwelling Type

**Table 5** – LIEE kWh Savings, kW Demand Reduction and Therm Savings

**Table 5A** – Average Bill Savings per Customer for Installations Completed and Paid

**Table 5B** – Average Bill Savings per Customer for Installations Completed and Not Paid

**Table 5C** – Average Bill Savings per Customer for Installations Completed and Paid and Not Paid

**Table 6** – CARE Program Expenses

**Table 7** – CARE Leveraging and Outreach Contractor Expenses  
No longer reported

**Table 7A** – CARE Leveraging and Outreach Contractor Legend  
No longer reported

**Table 8** – CARE Capitation Fees

**Table 8A** – CARE Capitation Contractor Legend

**Table 9** – CARE SBX1-5 Percentage of Expenditures for Mass Marketing  
No longer reported

**Table 10** – CARE Enrollment, Recertification and Attrition



**Table 10.1** – DCSD CARE Automatic Enrollment

**Table 11** – CARE Standard Random Verification Results

**Table 11A** – CARE Random Verification Results for SBX1 5 Outreach

**Table 11B** – Combined CARE Standard Random Verification Results

**Table 12A** – Rural vs. Urban CARE Enrollments (Electric Only)

**Table 12B** – Rural vs. Urban CARE Enrollments (Gas Only)

**Table 12C** – Rural vs. Urban CARE Enrollments (Gas and Electric Combined)

**Table 13A** – Rural LIEE Installations (Gas Only)

**Table 13B** – Rural LIEE Installations (Electric Only)

**Table 13C** – Rural LIEE Installations (Gas and Electric Combined)

**Table 13D** – Urban LIEE Installations (Gas Only)

**Table 13E** – Urban LIEE Installations (Electric Only)

**Table 13F** – Urban LIEE Installations (Gas and Electric Combined)

**Table 14** – CARE Participation - Rural

**Table 15** – CARE Participation - Urban

**Table 16** – CARE Participation – Combined Rural and Urban

**Table 17** – Summary of Urban Homes Treated (Base Funding)

**Table 18** – Summary of Urban Homes Treated (SBX1-5 Appliance Funding)  
No longer reported

**Table 19** – Summary of Urban Homes Treated (SBX1-5 LIEE Funding)  
No longer reported

**Table 20** – Summary of Urban Homes Treated (Base and SBX1-5 Funding)  
No longer reported

**Table 21** – Summary of Rural Homes Treated (Base Funding)

**Table 22** – Summary of Rural Homes Treated (SBX1-5 Appliance Funding)  
No longer reported

**Table 23** – Summary of Rural Homes Treated (SBX1-5 LIEE Funding)  
No longer reported

Pacific Gas and Electric Company LIEE and CARE Monthly Report

**Table 24** – Summary of Rural Homes Treated (Base and SBX1-5 Funding)

No longer reported

**Table 25** – Summary Energy and Bill Savings Base Program (Base Funding)

**Table 26** – Summary Energy and Bill Savings Base Program (SBX1-5 Appliance Funding)

No longer reported

**Table 27** – Summary Energy and Bill Savings Base Program (SBX1-5 LIEE Funding)

No longer reported

**Table 28** – Summary Energy and Bill Savings Base Program (Base and SBX1-5 Funding)

No longer reported

**Table 29** – Rural and Urban Capitation Contractors

**Table 30** – LIEE Penetration

CERTIFICATE OF ELECTRONIC SERVICE

I, the undersigned, state that I am a citizen of the United States and am employed in the City and County of San Francisco; that I am over the age of eighteen (18) years and not a party to the within cause; and that my business address is 77 Beale Street, San Francisco, California 94105.

I am readily familiar with the business practice of Pacific Gas and Electric Company for collection and processing of correspondence for mailing with the United States Postal Service. In the ordinary course of business, correspondence is deposited with the United States Postal Service the same day it is submitted for mailing.

On 22<sup>nd</sup> February, 2006, I served a true copy of:

**FIFTY-SEVENTH STATUS REPORT  
OF PACIFIC GAS AND ELECTRIC COMPANY (U 39 M)  
ON THE RESULTS OF ITS LOW INCOME ENERGY EFFICIENCY AND CARE  
PROGRAM EFFORTS IN COMPLIANCE WITH ORDERING PARAGRAPH  
17 OF DECISION 01-05-033, ISSUED MAY 7, 2001**

- [XX] By Electronic Mail – serving the enclosed via e-mail transmission to all parties on the official service list for CPUC Docket R. 04-01-006 that have provided e-mail addresses.
- [XX] By First Class Mail – serving the enclosed via US mail on all parties on the official service list for CPUC Docket R. 04-01-006 where electronic service cannot be effectuated.

I certify and declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Executed on 22<sup>nd</sup> February, 2006

  
\_\_\_\_\_  
PATRICIA A. KOKASON