

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

Applications of Pacific Gas and Electric Company for Approval of the 2009-2011 Low Income Energy Efficiency and California Alternate Rates for Energy Programs and Budget (U39M)	Application 08-05-022 (Filed May 15, 2008)
Application of San Diego Gas & Electric Company (U 902 M) for Approval of Low Income Assistance Programs and Budgets for Program Years 2009 – 2011.	Application 08-05-024 (Filed May 15, 2008)
Application of Southern California Gas Company (U 904 G) for Approval of Low Income Assistance Programs and Budgets for Program Years 2009 – 2011.	Application 08-05-025 (Filed May 15, 2008)
Application of Southern California Edison Company (U 338-E) for Approval of Low Income Assistance Programs and Budgets for Program Years 2009, 2010 and 2011.	Application 08-05-026 (Filed May 15, 2008)

**ANNUAL REPORT ACTIVITY OF SOUTHERN CALIFORNIA GAS COMPANY
(U 904 G) ON LOW INCOME ASSISTANCE PROGRAMS FOR 2009**

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(U 904 G) ON LOW INCOME ASSISTANCE PROGRAMS FOR 2009**

This is the annual report of program year (PY) 2009. The purpose of this report is to consolidate activity for the CARE and LIEE programs and provide the Energy Division with all the necessary information to assist in analyzing the low-income programs.

This report presents program year 2009 LIEE and CARE results and expenditures for Southern California Gas Company (SoCalGas).

Respectfully Submitted,

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LOW INCOME ENERGY EFFICIENCY PROGRAM ANNUAL REPORT

1. LIEE Executive Summary

In recognition of the changes in the energy markets and the environment, as well as the needs of low-income customers and the larger community, the California Public Utilities Commission (Commission) in Decision (D.) 07-12-051 updated its policy objectives for the Low Income Energy Efficiency (LIEE) Programs stating:

“[T]he key policy objective for the LIEE Programs, like that of our non-LIEE Energy Efficiency Programs, is to provide cost-effective energy savings that serve as an energy resource and to promote environmental benefits. We retain our commitment to ensuring the LIEE Programs add to the participant’s quality of life, which implicates, equity, energy affordability, bill savings and safety and comfort for those customers who participate in LIEE Programs.”¹

To achieve these objectives, the Commission adopted a programmatic LIEE initiative (programmatic initiative) “to provide all eligible LIEE customers the opportunity to participate in LIEE Programs and to offer those who wish to participate all cost effective energy efficiency measures in their residences by 2020.”²

In D.08-11-031, the Commission adopted Southern California Gas Company’s (SoCalGas) LIEE Program³ design and budget to meet the Commission’s key policy objective of making LIEE a reliable energy resource and to accomplish the programmatic initiative of reaching 25% of all willing and eligible households during the 2009-2011 program cycle.

¹ D.07-12-051 at p. 25.

² *Id.*

³ SoCalGas’ LIEE program is also known as the “Direct Assistance Program (DAP)”.

This report provides information on SoCalGas' LIEE Program accomplishments and expenditures for program year (PY) 2009. SoCalGas' LIEE Program offers its low-income customers weatherization services, energy efficient appliances, and energy education at no cost to qualified natural gas customers within its service territory.

**1.1. Alignment of LIEE with Strategic Plan
Goals and Strategy**

The long-term California Strategic Plan's vision for the LIEE Program is to have 100% of all eligible and willing low-income customers receive all cost effective Low Income Energy Efficiency measures by 2020. The Plan lays out two goals in achieving the LIEE vision: 1) By 2020, all eligible customers will be given the opportunity to participate in the LIEE Program; and, 2) The LIEE Programs will be an energy resource by delivering increasingly cost-effective and longer-term savings.

**1.1.1. Please identify the IOU strategies employed in meeting
Goal 1: Improve Customer Outreach.**

See "Implementation Plan and Timeline" - Table on the next page.

Implementation Plan and Timeline		
Strategies	Near Term 2009 – 2011	IOU strategy employed this program year
1.1: Strengthen LIEE outreach using segmentation analysis and social marketing tools.	<ul style="list-style-type: none"> • Identify, implement and evaluate effective marketing, education and outreach methods for targeting low-income customer segments. • Use social marketing to effectively engage low-income customers in program participation. 	<ul style="list-style-type: none"> • Marketing campaigns such as targeted direct mailings, bill inserts, and automated voice messaging were effective, as well as information resources such as demographics and energy usage, used to contact various customer segments and educate them on the LIEE Program. • Whole Neighborhood Approach (WNA) identified and reached out to targeted low-income customer segments. To better implement WNA, a pre-canvassing letter was developed for contractors to distribute to customers targeted to receive LIEE Program services. • An on-line LIEE interest form was used to collect information on potential customers and identify and track current market segments.
1.2: Develop a recognizable and trustworthy Brand/Tagline for the LIEE Programs.	<ul style="list-style-type: none"> • Develop a statewide program name and description for LIEE which is coordinated with the ME&O efforts for energy efficiency, demand response and any other demand-side options. • Implement branding. 	<ul style="list-style-type: none"> • SoCalGas participated in meetings with the other investor-owned utilities (IOUs)⁴ in the development of a single statewide ME&O plan as part of the general Energy Efficiency (EE) proceeding. In late 2009, SoCalGas began preparatory work for the January 2010 state-wide LIEE branding project kick-off with Interbrand, an international branding consultancy contracted to support the effort.

⁴ The IOUs consist of SoCalGas, Pacific Gas and Electric Company (PG&E), San Diego Gas & Electric Company (SDG&E), and Southern California Edison Company (SCE).

Implementation Plan and Timeline		
Strategies	Near Term 2009 – 2011	IOU strategy employed this program year
1.3: Improve program delivery	<ul style="list-style-type: none"> • Use information from segmentation analysis to achieve efficiencies in program delivery. • Leverage with local, state, and federal agencies as well as other organizations to increase seamless coordination, efficiency and enrollment 	<ul style="list-style-type: none"> • SoCalGas Implemented WNA (including the use of Zip-7 and PRIZM Code tools)⁵ to generate lead lists of households believed to have a high probability of meeting the LIEE Program’s eligibility requirements. This aided outreach contractors in identifying LIEE-eligible market segments and comprehensively canvassing eligible households before moving on to another lead list. • SoCalGas worked to develop a partnership with LA County Department of Public Social Services, to leverage promotion of the LIEE Program to categorically eligible⁶ Food Stamp/Supplemental Nutritional Assistance Program (SNAP) participants. • Working with USC Family of Schools and Kid Watch, SoCalGas provided LIEE Program information directly to community members at local events, generating over 150 customer leads. • SoCalGas Public Affairs representatives used their contacts to help promote the LIEE Program to local, state, and federal agencies.

⁵ PRIZM codes are a set of area-based customer segmentation data widely used for marketing purposes in the United States. The data consist of demographic clusters that categorize every U.S. household into a segment. These segments were developed in part from the analysis of U.S. census data and categorize U.S. consumers into 14 distinct groups and 66 segments. The segments help marketers tailor content to consumers' needs and look at a variety of factors, including income, likes, dislikes, lifestyles and purchasing behaviors.

Implementation Plan and Timeline		
Strategies	Near Term 2009 – 2011	IOU strategy employed this program year
1.4: Promote the growth of a trained LIEE workforce.	<ul style="list-style-type: none"> • Incorporate LIEE training needs into the Workforce Training needs assessment. • Develop Training Roadmap which includes funding requirements and sources other than IOUs. • Implement LIEE workforce education and training. 	<ul style="list-style-type: none"> • SoCalGas participated in the Workforce Education & Training (WE&T) pilot with Los Angeles Trade Technical College (LATTC), The East Los Angeles Community Union (TELACU) and Community Enhancement Services (CES) to recruit students, and to provide input on the training program. • SoCalGas improved existing outreach and assessment training delivery by increasing class availability and therefore maximizing the number of students able to successfully complete training classes. • SoCalGas increased participation in the weatherization, HVAC, and natural gas appliance testing (NGAT) training classes to increase student’s technical expertise.

⁶ As stated in D.06-12-038 and reiterated in D. 08-11-031, customers who can provide documents proving participation in one of several state or federal programs do not need to provide additional income documentation to qualify for enrollment in LIEE and CARE programs, as they are “categorically eligible”.

1.1.2. Please identify the IOU strategies employed in meeting Goal 2: LIEE is an Energy Resource

Implementation Plan and Timeline		
Strategies	Near Term 2009 – 2011	IOU strategy employed this program year
2.1: Increase collaboration and leveraging of other low-income programs and services	<ul style="list-style-type: none"> • Identify key areas where data sharing would be possible and advantageous. • Develop partnerships with community organizations and other agencies to leverage resources available from local governments, federal, state, and private project funding sources. 	<ul style="list-style-type: none"> • SoCalGas engaged in quarterly meetings with the California Department of Community Services and Development (DCSD), its Energy Council of Low Income Home Energy Assistance Program (LIHEAP) agencies, the Commission’s Energy Division, and other investor-owned utilities (IOUs) to begin development of a LIHEAP leveraging model, including a data sharing plan. • SoCalGas partnered with several community organizations and agencies to leverage LIEE services with other energy efficiency and home retrofit programs, including: <ul style="list-style-type: none"> ◦ Grid Alternatives⁷ through TELACU ◦ Volunteers of East Los Angeles (VELA);⁸ ◦ Community Handyman Program (through Veterans In Community Service)⁹. <p>These partnerships expanded WNA through leveraged services.</p>
2.2: Coordinate and communicate between LIEE,	<ul style="list-style-type: none"> • Ensure LIEE participants are aware of energy efficiency and 	<ul style="list-style-type: none"> • Every customer treated by the LIEE Program receives an Energy Education guide that promotes all

⁷ Grid Alternatives manages the Single-family Affordable Solar Homes (SASH) Program on behalf of the Commission.

⁸ VELA is a non-profit agency involved in various community projects and programs that service the East LA area.

⁹ The Community Handyman Program is part of the City of Commerce’s effort to support low and moderate-income home renovations through its sub-grant funding from the Los Angeles Community Development Commission’s Federal Community Development Block Grant (“CDBG”).

Implementation Plan and Timeline		
Strategies	Near Term 2009 – 2011	IOU strategy employed this program year
energy efficiency and DSM Programs to achieve service offerings that are seamless for the customer.	<p>DSM/EE Programs.</p> <ul style="list-style-type: none"> • Coordinate with CSI Programs to provide LIEE Program services in qualified low-income housing for both single family and multi-family CSI Programs. • Coordinate AMI delivery and LIEE Programs 	<p>of SoCalGas' EE Programs.</p> <ul style="list-style-type: none"> • The California Solar Initiative (CSI) SASH Program is managed by Grid Alternatives. SoCalGas worked with Grid Alternatives and TELACU to leverage LIEE measure installations with solar measure installations. • SoCalGas did not have an advanced metering infrastructure (AMI) Program in place during 2009.
2.3: Provide low-income customers with measures that result in the most savings in the LIEE Program	<ul style="list-style-type: none"> • Assess design of programs to ensure increasingly cost effective measures, while reducing low-income customers' bills and improving quality of life. • Continue to include measures that provide long-term energy savings, such as refrigerators. 	<ul style="list-style-type: none"> • SoCalGas participated in the development of installation standards for new measures added in PY2009, such as furnace pilot retrofit kit, high efficiency (HE) clothes washers, and the furnace clean and tunes, which will result in energy savings to customers. • The upcoming evaluation of the High Efficiency Forced Air Unit Furnace Pilot, conducted in PY2009, will assess the energy savings for low-income customers who received LIEE services in 2008 and were considered high-energy users. • SoCalGas continued to provide all feasible measures to customers' homes, including water heater and gas appliance repairs and replacements which should lead to long-term energy savings. Also by completing door and building envelope repairs, SoCalGas improved customer comfort, and energy efficiency, by reducing air infiltration.
2.4: Increase delivery of	<ul style="list-style-type: none"> • Identify and develop segmented approach to 	<ul style="list-style-type: none"> • SoCalGas used PRIZM codes and Zip-7 codes to define WNA areas

Implementation Plan and Timeline		
Strategies	Near Term 2009 – 2011	IOU strategy employed this program year
efficiency programs by identifying segmented concentrations of customers.	<p>deliver services to households</p> <ul style="list-style-type: none"> • Improve use of CBOs in delivering services 	<p>to help reach geographically concentrated LIEE-eligible customer segments.</p> <ul style="list-style-type: none"> • SoCalGas utilized 18 community-based organizations (CBOs) as LIEE contractors, and hosted bimonthly contractor meetings for its entire LIEE Contractor Network to coordinate resources, update program changes and improve LIEE program delivery. • LIHEAP agencies that are also LIEE contractors are able to leverage services offered to their in-take customers with the LIEE Program. LIHEAP agencies are CBOs who offer services such as: <ul style="list-style-type: none"> ◦Support for child, youth, and family development, ◦Support for seniors and the disabled community, ◦Utility bill payment assistance, ◦Health services, and ◦Homeless services.

1.2. Low Income Energy Efficiency Program Overview

The SoCalGas LIEE Program serves all eligible low-income customers, willing to participate in the program, by providing all feasible LIEE measures¹⁰ as determined through its outreach and assessment and installation process. During PY2009, SoCalGas' LIEE Program treated¹¹ a total of 85,147 homes, which represents a 45% increase from PY2008 results and 77% of the PY2009 program goal. Also in PY2009, 71,595 homes were weatherized¹², which is a 30% increase over PY2008 results. In PY2009, SoCalGas saw an unprecedented number of homes treated through its LIEE Program.

As part of its comprehensive services to eligible LIEE participants, SoCalGas provided: in-home energy education to 76,988 customers, 67,829 envelope and air sealing measures, 71,634 water heater conservation measures, 2,276 clean and tune weatherization measures, and 2,575 duct seal weatherization measures. In addition, SoCalGas serviced 7,041 appliances -including 615 water heater replacements, and 6,426 furnace repair or replacements. A total of 3,562 customers were classified as "ineligible"¹³ or "unwilling"¹⁴ to participate in PY2009.

¹⁰ As directed in Ordering Paragraph (OP) 15 of D. 08-11-031.

¹¹ Per D.02-12-019, the Commission defines a "treated" home as an income-qualified home that has received any measure or service under the LIEE program, including energy education, compact fluorescent lamps, weatherization and appliances. Under the LIEE program, a treated home must receive all feasible measures for which it qualifies.

¹² Per D.02-12-019, the Commission defines a "weatherized" home as a subset of treated homes, and are defined as income-qualified homes that have received any weatherization measures (e.g., weatherstripping and caulking) under the LIEE program.

¹³ Ineligible: Customers who can not participate in the program due to lack of cooperation from the owner/landlord, or customers who do not meet the LIEE program's eligibility guidelines.

¹⁴ Unwilling: Customers that received information on the program and informed the outreach specialist that they are not interested in the program.

Weatherization and appliance installations resulted in first year energy savings of 1,598,421 therms as shown in Section 1.2.1. The energy savings achieved through the 2009 LIEE Program will contribute to the Commission's energy savings goals adopted for program year 2006 and beyond as set forth in D.04-09-060.¹⁵ The average per home lifecycle bill savings for the PY2009 LIEE Program was \$160.

SoCalGas will be filing a petition for modification (PFM) to request the inclusion of certain measures that were inadvertently omitted from its Application for its 2009–2011 LIEE program cycle. Specifically, SoCalGas inadvertently omitted measures available for certain climate zones and/or dwelling type. Installation of these measures should be allowed because they are consistent with the Commission's programmatic initiative to *“provide all eligible LIEE customers the opportunity to participate in LIEE programs and to offer those who wish to participate all cost-effective energy efficiency measures in their residences by 2020.”*¹⁶

Consistent with the cost-effective methodologies adopted in D.08-11-031, SoCalGas conducted cost effectiveness tests for those measures that were inadvertently omitted and the results showed that a significant number of the measures passed the cost effectiveness test threshold of 0.25 benefit/cost ratio for measure installation. During 2009, SoCalGas installed all feasible measures in eligible customers' homes as reflected in Attachment F3 of D.08-11-031, including those measures in certain climate zones and/or dwelling types that were inadvertently omitted.

In its PFM, SoCalGas will request to receive credit for the measure installations, and any energy savings and expenditures associated with the measures because eligible customers received the benefits of the LIEE

¹⁵ Findings of Fact 13.

¹⁶ D.07-12-051, p.2.

program and the energy savings contributed to the Commission’s energy savings goal adopted by D.04-09-060. Those expenditures and energy savings have been reflected in Section 1.2.1., the summary table below.

1.2.1. Provide a summary of the LIEE Program elements as approved in D. 08-11-031:

Program Summary			
	Authorized / Planning Assumptions	Actual	%
Budget	\$62,571,908	\$49,101,879	78
Homes Treated	110,864	85,147	77
Therms Saved	2,564,567	1,598,421	62

There was an over 50% increase in the number of homes treated by the LIEE Program in PY2009 over PY2008. Due to the high number of homes treated in PY2009, as noted in the table above, additional coordination with LIEE contractors was needed. Therefore, SoCalGas coordinated with its contractors and external partners to improve LIEE Program delivery, ultimately working in unison to serve a greater number of customers with energy efficiency measures.

SoCalGas collaborated with its LIEE Contract Network to streamline key processes associated with LIEE Program implementation. SoCalGas’ staff reached out to all of its LIEE contractors via telephone to offer them assistance with systems processes such as data-entry and invoicing. Additionally, SoCalGas’ staff met in person with contractors that were experiencing difficulties with invoicing and data-entry, and trained them on best practices for invoice processing and system data-entry. During these training sessions, SoCalGas also listened for feedback from its contractors on challenges they faced related to systems processing, with the objective of incorporating their input to improve workflow management for all involved. Through working jointly with its contractors on systems processes and other important areas, SoCalGas made progress in streamlining its internal work processes so that contractors could focus their time and resources towards installing LIEE

Program measures. SoCalGas also met with its LIEE Contractor Network bi-monthly to address contractor challenges and program changes.

In PY2009, SoCalGas increased its LIEE Contractor Network with qualified and experienced contractors that provided a range of LIEE services. In 2010, SoCalGas will issue a Request for Qualification (RFQ) /Request for Proposal (RFP) to solicit additional qualified contractors for all service areas of the LIEE Program. By expanding its LIEE Contractor Network, SoCalGas will increase its capacity to enroll more eligible customers and to provide them with LIEE services.

Also in PY2009, SoCalGas increased its efforts in hard-to-reach areas. For example, SoCalGas increased the number of LIEE contractors serving the Central Valley. As a result, both new and existing contractors contributed to 8,638 enrollments (10.1% of the total units treated in PY2009) in Fresno, Kern, Kings, and Tulare counties.

SoCalGas' LIEE Program is committed to providing opportunities to diverse business enterprises (DBE). In PY2009, the expanded LIEE contractor network also included DBE contractors certified through the Commission. A total of 15 out of 38 contractors or 39% of contractors working in the LIEE Program were DBE contractors in PY2009. For the services that they performed under the SoCalGas LIEE Program in PY2009, DBE LIEE contractors received over \$25 million, or almost 60% of the LIEE Program's 2009 direct purchases and installation contractor expenditures; see LIEE - Table 5 in the attachments. In addition, some of the LIEE contractors have committed to award subcontracts to DBE vendors in the range of 10 to 100 percent. In PY2009, DBE LIEE subcontract work contributed \$7.9 million to the over \$25 million total expenditures distributed to DBE LIEE Contractors.

In addition to the increased number of customer homes that SoCalGas' LIEE contractors treated in PY2009, close attention to customer service

remained a top priority for SoCalGas. Overall, 86% of customers reported being highly satisfied with the LIEE Program in PY2009. In addition, throughout the program year an average of 92% of the customers treated also reported being highly satisfied with the LIEE installation experience. Customer satisfaction, a key goal for SoCalGas, was partially managed through frequent evaluations that provided results specific to LIEE contractors servicing customers. The customized evaluations assisted LIEE contractors in understanding customer viewpoints and presented additional insight on ways to enhance and improve service delivery.

SoCalGas maintains its commitment to work closely with its LIEE Contractor Network and to constantly seek innovative channels for program improvement to retain these high customer service results. SoCalGas continues to strengthen the LIEE Program and has positioned itself to meet 2010 program goals. This report identifies strategies to meet LIEE Program goals in various sections (including, but not limited to Sections 1.4.3, and 1.5.4).

1.3. Whole Neighborhood Approach Evaluation¹⁷

1.3.1. Provide a summary of the geographic segmentation strategy employed, (i.e. tools and analysis used to segment “neighborhoods,” how neighborhoods are segmented and how this information is communicated to the contractor/CBO).

By June of 2009, SoCalGas began to define neighborhoods on a smaller scale, using Zip-7 codes (the five-digit postal zip code plus the first two digits of the four-digit zip code extension), which provided a greater level

¹⁷ On January 20, 2010, an Assigned Commissioner and an Assigned ALJ Ruling Updating the Scoping Memo and Ruling was issued which updated the scope of the low-income proceeding and included an updated proceeding schedule. Among the issues to be addressed in 2010 is a refinement of the Whole Neighborhood Approach.

of detail on a neighborhood than traditional five-digit zip codes. Zip-7 codes also represent the highest level of detail included in the demographic information provided to SoCalGas by Athens Research¹⁸.

SoCalGas extracted Zip-7 codes, identified smaller areas to target, and then used this data to create more refined canvass lists for contractors. SoCalGas used 200% of the federal poverty level as a factor to calculate the “estimated eligible” population in each Zip-7 area. In addition, SoCalGas provided contractors with canvass lists utilizing PRIZM codes, a data source that allows contractors to better determine the likelihood of a particular household’s participation in the LIEE Program related to their market characteristics. A set of instructions is included with every canvass list provided to contractors. Contractors also received regular information updates at the bi-monthly LIEE contractor meetings.

In 2009, the WNA used a geographic segmentation strategy that compared customer account numbers contained in Zip-7 and other canvass lists against the Home Energy Assistance Tracking (HEAT) system, a database used for all LIEE Program tracking and reporting. This process determined if a particular household had previously been served by the LIEE Program. Only households that had not yet been served would appear on canvass lists. Other useful information, such as a customers’ CARE status would also appear for the contractors’ information.

- 1.3.2.** Provide a summary of the customer segmentation strategies employed (i.e. tools and analysis used to identify customers based on energy usage, energy burden and energy insecurity) and how these customer segments are targeted

¹⁸ Athens Research is a contractor that develops large and small area estimates of demographic eligibility on behalf of the Joint Utilities.

in the Whole Neighborhood Approach to program outreach.

In August 2009, to promote the LIEE program, SoCalGas sent letters in English and Spanish to 33,823 CARE customers, who had not previously received LIEE services. Based on identified customer incomes¹⁹, households were projected to have a high probability of energy burden²⁰. This effort also utilized demographic analysis tools such as PRIZM²¹ codes and geographic segmentation in order to better target SoCalGas' low-income customers. SoCalGas plans to analyze the campaign's response rate, and if it is determined to be appropriate then a follow-up WNA effort will be employed.

A second campaign in PY2009 targeted high energy users and customers with energy insecurity²², using a personalized direct mail letter that promoted the LIEE Program. Targeted customers were defined as high energy users if they used more than 750 therms per year, and customers with energy insecurity were defined as those which made at least two payment arrangements within 12 months. The targeted direct mail campaign was deployed to 4,264 CARE customers in July 2009 and the letter was printed in English and Spanish. By August 2009, 39 of the targeted customers enrolled in the LIEE Program. The effort described was part of a targeted marketing campaign.

¹⁹ Information and analysis was based on demographics from the Bureau of Economic Analysis, and SoCalGas customer data. Median customer incomes were at or below \$29,000.

²⁰ D. 08-11-031 generally defines high energy burden related to the ratio of customers' energy bills to their relative income.

²¹ The targeted very low-income zip code falls under the New Beginnings (Younger Years) PRIZM code. This group is generally under 45, and childless singles and couples. Some college, rent and PRIZM says they are White, African-American and Hispanic.

²² D. 08-11-031 generally defines high energy insecurity customers as those with late payments or threatened service shut-off.

- 1.3.3.** Describe how the current program delivery strategy differs from previous years, specifically relating to Identification, Outreach, Enrollment, Assessment, energy Audit/Measure Installation, and Inspections.

The PY2009 LIEE Program delivery strategy differed from that of previous years in two significant ways under the “Outreach” umbrella. The first is in the use of geographic segmentation through Zip-7 areas, which are smaller and more manageable than previously used five-digit zip codes, and is a better indicator of what households are likely to meet the LIEE Program’s eligibility criteria. The Zip-7 methodology provides contractors the ability to target areas with higher concentrations of potentially eligible customers. In conjunction with Zip-7 codes, PRIZM codes depict market characteristics of the targeted areas.

The second significant way the program outreach differs from previous years is that in PY2009, SoCalGas applied a time frame for contractors to complete their WNA lead lists. LIEE contractors were encouraged to complete WNA Zip-7 canvass lists within 30 days of their receipt. The completion of WNA efforts requires the contractor to address the entire customer list through documentation in the HEAT system for both enrolled and non-enrolled customers, which proved to be a challenge during 2009. SoCalGas is working to assist contractors in meeting the reporting requirements on enrolled and non-enrolled customers in 2010. Non-enrolled customer information provides useful information on a customer’s ineligibility or unwillingness to participate versus customers that the contractor was unable to contact.

1.4. LIEE Customer Enrollment Evaluation

- 1.4.1.** Distinguish between customers treated as “go backs” and brand new customers so that the Commission has a clear idea of how many new customers the IOUs are adding to the LIEE Program.

SoCalGas continues its focus on offering the LIEE Program to dwellings that have not been served by the program in previous years. SoCalGas enrolled a total of 81,972 new customers, which represents 96% of the homes treated in 2009. This resulted in 3,175 (4%) treated homes that were considered “go backs.”

1.4.2. Please summarize new efforts to streamline customer enrollment strategies, including efforts to incorporate categorical eligibility (CE) and self-certification.

Throughout 2009, SoCalGas made major strides in tightening the LIEE enrollment process. The key efforts to streamline enrollment centered on:

- Implementing the WNA to direct outreach to self-certifiable customers²³ that either live in areas where 80% of customers are at or below 200% of the federal poverty line, or that have been CARE post-enrollment verified (PEV)²⁴; and,
- Expanding LIEE CE to include LifeLine CE requirements as directed in D. 08-11-031.
- LIEE Contractors developing agreements with property management companies and/or various housing authorities to provide LIEE services to communities likely to meet self-certification requirements and/or likely to be categorically eligible.
- LIEE Contractors, who are also LIHEAP agencies, maximizing their efforts to enroll customers for LIEE services who were also categorically eligible based on services provided within their agencies.

²³ In D.05-10-044 the Commission allowed SDG&E and SoCalGas to use 2000 census tract data to identify neighborhoods where they could suspend income documentation requirements enroll customers in the LIEE program through self-certification, if those customers lived in areas where 80% of the households were at or below 200% of the federal poverty line. In D.06-08-025, D.06-12-038, and D. 08-11-031, the Commission allowed continuation of the self-certification process described above.

²⁴ Select CARE customers have their incomes verified through the CARE audit process. Following this process, verified eligibility status is identified on contractors’ lead lists. Since the same income requirements apply to both CARE and LIEE, the LIEE enrollment process is streamlined for CARE PEV customers.

Self-certification:

SoCalGas enrolled 3,343 customers through the WNA. The WNA generates canvassing lead lists for outreach contractors that notate Zip-7 codes and CARE PEV status. Zip-7 codes and CARE PEV streamline customer enrollments by highlighting households that meet the self-certification criteria adopted in D. 05-10-044 against those that do not. In addition to WNA lead lists, contractors also used PRIZM codes to streamline their enrollment process through non-WNA efforts.

Expanded LIEE CE:

In PY2009, LIEE CE was expanded to include seven additional programs²⁵:

- SNAP
- Tribal Temporary Assistance to Needy Families (TANF)
- Bureau of Indian Affairs General Assistance (BIA GA)
- National School Lunch Program (NSLP)
- Tribal Head Start
- State Supplemental Security Income (SSI), and
- Healthy Families A & B.

To improve implementation of the expanded categorical enrollment policy, various elements of the program were updated, including: marketing materials, SoCalGas' customer assistance website, and outreach contractor training curriculum. Leveraging partnerships were also developed, with the idea of maximizing CE enrollment opportunities.

In PY2009, SoCalGas initiated a leveraging campaign with Los Angeles County's Department of Public Social Services (DPSS) as an avenue to enroll categorically eligible food-stamp/SNAP recipients. However, customer privacy issues prevented SoCalGas from entering into a data

²⁵ These programs are in addition to: Medicaid/Medi-Cal, Women, Infants, and Children Program (WIC), and LIHEAP.

sharing agreement with the DPSS, and consequently SoCalGas was unable to directly target DPSS customers. Notwithstanding, the campaign has proceeded as a marketing promotion, in which DPSS forwards SoCalGas' LIEE and CARE Program information including applications to categorically eligible customers. See Section 2.6.1 on expanded CARE CE.

1.4.3. If the IOU has failed to meet its annual goal of number of households served, please provide an explanation of why the goal was not met. Explain the programmatic modifications that will be implemented in order to accomplish future annual goals of number of households served.

SoCalGas and its LIEE contractor network worked diligently throughout PY2009 to treat 85,147 homes or 77% of its 2009 goal. The unprecedented number of homes treated is a historic milestone for the SoCalGas LIEE Program. The following factors contributed to SoCalGas' inability to meet its goals for the number of households served during 2009:

- The economic downturn led to creditors capping many contractors' lines of credit, which in turn prevented contractors from ramping up their resources for the PY2009.
- A data sharing model for homes that have been treated by other EE programs is being developed, but currently is not available. SoCalGas continues to increase its leveraging efforts in order to maximize LIEE and non-LIEE services to potential customers.
- Enrollment barriers related to: the transiency of SoCalGas' LIEE renter customer segment, gaining the trust of potential LIEE customers, increasing awareness of LIEE program services, language barriers, and varying customer schedules, also impaired SoCalGas' efforts.
- Additional program coordination was required to prepare new LIEE contractors (including those considered experienced) to be service providers under the LIEE program, as well as capacity building

efforts for existing LIEE contractors. A significant effort was made to increase the overall capacity of the LIEE Contractor Network and SoCalGas anticipates success in meeting future annual goals.

- Introduction and expansion of competing low income and general EE programs, including the expansion of SoCalGas' LIEE Program created initial resource allocation obstacles for contractors and resulted in decreased production levels for contractor agencies. However, internal agency expansions to meet the overall needs of LIEE and non-LIEE programs, has positioned these contractors to increase production for SoCalGas' LIEE Program. In addition, SoCalGas will release a RFQ/RFP seeking qualified contractors.

SoCalGas looks forward to the challenges of meeting its aggressive 2010 goals, and will continue to work closely with its LIEE Contractor Network to implement program improvements to increase enrollments and to continue building contractor capacity. SoCalGas will expand data mining and customer information collection to increase contractors' success with LIEE enrollments. This includes returning to potential customers where enrollment was attempted, but not completed. SoCalGas will also continue to increase leveraging activities with new and existing external partners in the areas of EE, workforce education and training, marketing, and other areas that will increase LIEE Program awareness. Leveraging efforts will continue to be developed with LIHEAP, Municipal Utilities and other non-LIEE CBOs and community resources. SoCalGas will also continue to increase integration between the SoCalGas general EE and LIEE Programs to ensure advantages in all possible areas between the programs.

SoCalGas will continue targeted marketing campaigns to CARE customers who are familiar with SoCalGas' customer assistance programs. In addition, general marketing should help raise customer awareness of LIEE Program benefits. In 2009, through WNA, different approaches to address "time-home" or customer schedule issues were discussed. SoCalGas intends to work with community-based and faith-based

organizations in neighborhoods to develop the best approaches to increase customer convenience for receiving LIEE measures.

The strategies described above will help to increase overall LIEE enrollment totals as well as increase the number of service providers participating in SoCalGas' contractor network.

1.5. Disability Enrollment Efforts

1.5.1. Provide a summary of efforts to which the IOU is meeting the 15% penetration goal.

SoCalGas targeted low-income Medical Baseline and customers with disabilities²⁶ through a variety of approaches, such as bill inserts, direct mail campaigns, automated voice messaging, and special events.²⁷ The direct mail letters used large font and were also translated into Spanish.

- Direct mail was sent to existing customers that were on both the CARE and Medical Baseline Programs to promote enrollment in the LIEE Program. Customers with overlapping participation in CARE and Medical Baseline Programs account for low-income customers (through CARE) and customers with disabilities (through Medical Baseline). In the short-run the campaign generated a 3 percent customer response rate from its 7,867 recipients. However, SoCalGas anticipates continuous responses from interested customers.
- A second direct mail campaign was conducted in May 2009, in which letters were sent to 3,761 existing CARE customers who, according to SoCalGas' Customer Service records had a disability.

²⁶ Customer Service Representatives categorized customers as having a disability when they either called in on a Telecommunications Device for the Deaf (TDD or TTY), or because they self-identified as, or stated having at least one of nine conditions (Blind, Deaf, Hemiplegic, Paraplegic, Quadriplegic, Scleroderma, Life Threatening Illness, Multiple Sclerosis, and Compromised Immune System) classified as disabilities. Customer Service records of customers with disabilities were used in targeted marketing campaigns.

²⁷ Pursuant to D. 08-11-031 OP 31, the Commission allows IOUs to count "customers who voluntarily self-identify as disabled or whom the IOUs enroll from the Medical Baseline program".

- SoCalGas LIEE representatives participated in the 7th Annual Scleroderma Walkathon, along with CARE and Public Affairs representatives. At the event, SoCalGas raised awareness of its low-income programs amongst the Scleroderma community.
- SoCalGas researched and identified 34 private and CBOs that provide services to the disabled community within the SoCalGas service territory. SoCalGas is continuing contact with this focused group to determine which organizations are interested in partnerships to provide LIEE services to customers with disabilities.
- LIEE Contractors, such as LIHEAP agencies who provide services to customers with disabilities also offered LIEE services to interested customers and followed up with enrollments and installations.
- LIEE Contractors developed relationships with disability community advocacy groups and/or disability customer care groups in order to target eligible customers with disabilities to offer LIEE services.

All efforts were designed to follow the Commission's directive to increase the number of households with disabilities that participate in the LIEE program.²⁸ During PY2009, 8,460 households enrolled in SoCalGas' LIEE program had a household member with a disability. This represents approximately 10% of the total enrollments for the year.

In PY2009, SoCalGas focused its efforts on engaging with The Center for the Blind, and the Greater Los Angeles Agency on Deafness. In addition, contact and collaboration with the Braille Institute helped generate new ideas on how to reach visually impaired customers. A leveraged mobile campaign, where the Braille Institute will perform community outreach with a traveling bus staffed and loaded with community program information is underway. SoCalGas will continue to develop and foster its relationships with organizations serving customers with disabilities to

²⁸ D. 08-11-031 OP 29.

improve delivery of LIEE services to those customers. Section 1.5.4 describes future opportunities to partner with LIEE capitation contractors, which will build SoCalGas' capacity to reach customers with special needs, by providing communication options such as American Sign Language.

In an effort to reach out to organizations supporting people with disabilities, and to comply with Commission directives to enhance outreach to customers with disabilities, SoCalGas contacted nine (9) independent learning centers and the offices of students with disabilities of six universities and colleges. As a result of the contacts, LIEE lead sheets were sent to the various organizations to be offered to interested clients and students on a continual basis.

In addition to SoCalGas Outreach campaigns to customers with disabilities, the LIEE Contractor Network had consistent interaction with the disabled community through the CBOs' in-house services providers, community resource partnerships, and other relationship building efforts made within low-income communities.

1.5.2. Describe how the LIEE customer segmentation for ME&O and program delivery takes into account the needs of persons with disabilities.

Direct mailing campaigns were sensitive to the visually impaired community, and to improve information accessibility, large font print was used in these campaigns. Considering that some customers are homebound, direct mailings, automated voice messaging, and canvassing are traditional yet effective ways to contact these customers.

Responding to the needs of customers with disabilities, SoCalGas updated its website to improve users' experience. The SoCalGas website, with particular emphasis in the Customer Assistance section, is designed to

comply with Web Content Accessibility (W3C) guidelines. This means that blind customers who use screen readers²⁹ and similar assistive technologies can navigate the site and read its content. In the assistance section, there are informational and explanatory videos on SoCalGas' assistance programs.

For the hearing impaired, in PY2009, subtitles were added to videos, which are ready to be posted to the website in 2010. Also in 2010, SoCalGas' Marketing and Outreach group plans to expand accessibility³⁰ efforts and develop a video that uses American Sign Language. Transcripts will supplement the videos and further assist customers who are deaf. The next identified step in increasing accessibility to the deaf community is closed caption videos in the assistance section of SoCalGas' website. SoCalGas has received positive customer feedback on its website's accessibility.³¹

²⁹ A screen reader is a software application that attempts to identify and interpret what is being displayed on the computer screen. This interpretation is then represented to the user with text-to-speech, sound icons, or a Braille output.

³⁰ For more information about SoCalGas web accessibility standards, see <http://www.socalgas.com/accessibility.html>.

³¹ In March of 2010, a SoCalGas customer provided a compliment on the LIEE video posted on socalgas.com. The comment came from a customer with a visual disability, who noted that the video option was easy to use and provided comprehensive information.

1.5.3. Identify the various resources the IOUs utilize to target the disabled community and the enrollments as a result:

Disability Enrollments			
Source ³²	Total Enrollments	Disability Enrollments	% of Disability Enrollment
Media Campaigns/Advertising through: Newspaper, Radio, Television and Transit Information Campaigns	642	100	16%
Canvassing and Outreach Specialist Referrals	60,732	5,351	9%
CARE Program Integration	239	26	11%
Direct Mail	552	78	14%
Other Utility Referral Leveraging	6,609	598	9%
Energy Efficiency Program Integration	3,842	856	22%
Gas Bill Insert	2,369	332	14%
Internet/Website/Email	2,203	205	9%
LIHEAP Leveraging	565	86	15%
Neighbor, Friend, or Relative Referral	1,895	231	12%
Outreach Events	1,335	175	13%
SoCalGas Referrals	2,262	273	12%
Other	1,902	149	8%
Total	85,147	8,460	10%
Target Enrollment Rate	110,864	16,630	15%

As described in Section 1.5.1, SoCalGas utilized bill inserts, canvassing/outreach referrals, direct mail, automated voice messaging campaigns and other similar means to target the disabled community. The LIEE Contractor Network also played a large role in significantly increasing enrollments within the disabled community. SoCalGas is looking to enhance its HEAT database capability to segment the source of an enrollment in order to provide more detailed reports in the future.

³² HEAT database lead source report

1.5.4. If participation from the disabled community is below the 15% goal, provide an explanation why:

SoCalGas significantly increased its enrollment of persons within the disabled community to 10% of total enrollments. SoCalGas will continue to improve its ability to track and report disability enrollments, as well as increase opportunities to further utilize WNA efforts and leverage with outside programs. SoCalGas has identified various strategies to implement in 2010 to help meet the 15% penetration goal for the disabled community. The identified strategies are as follows:

- Encourage community partnership with SoCalGas through payment of capitation fees to CBO for enrollment leads;
- Enlist a Public Affairs Representative to act as a liaison between SoCalGas LIEE Program and the disabled community, including CBOs serving the community;
- Focus on developing a partnership between the LIEE and the Deaf and Disabled Telecommunications Program (DDTP) to leverage resources;
- Improve data tracking of disability enrollments through HEAT; and,
- Work to develop WNA as a tool to flag Medical Baseline Customers on outreach canvassing lists.
- Maximize the ability of LIEE contractors to leverage in-house services to the disabled community with LIEE services, as well as expand relationships with private and non-profit entities that are involved in advocacy and are service providers to the disabled community.

In PY2009, SoCalGas submitted an Advice Letter,³³ requesting authorization to pay capitation fees to community based organizations (CBOs) for LIEE Program lead referrals. The Advice Letter was approved in a Commission Disposition letter, dated March 4, 2010. By allowing the payment of capitation fees, more organizations supporting the disabled community will have an additional incentive to work with SoCalGas to promote the LIEE Program, and contribute to the goal of 15% enrollment rate of customers with disabilities. With the Commission's approval of the requested policy change on capitation fee payments, SoCalGas anticipates improved partnerships with special needs CBOs. In 2010, SoCalGas will implement its LIEE capitation program which will focus outreach efforts to agencies serving clients with Limited English Proficiency, persons with a disability, and the elderly. SoCalGas estimates that it will successfully enroll 10,000 additional customers annually through this effort.³⁴ In addition, the SoCalGas LIEE Contractor Network will continue to build on existing community relationships in order increase disability enrollments.

In 2010, SoCalGas will use the results of its research on organizations serving the disabled community to seek additional opportunities for partnering with these agencies to ensure that eligible and willing customers with disabilities receive LIEE services. In addition, SoCalGas plans to improve outreach efforts to the disabled community by working with a designated spokesperson in the company's Public Affairs Department, as an avenue to connect with CBOs serving the disabled community. Discussions between SoCalGas LIEE Program and the Deaf

³³ Advice Letter 4067, requested authorization to establish a capitation fee for outreach to potential low income energy efficiency program customers with limited English proficiency, elderly, or with a disability and who are successfully enrolled in the program.

³⁴ See SoCalGas Advice Letter 4067 Request Authorization to Establish a Capitation Fee for Outreach to Potential Low Income Energy Efficiency Program Customers with Limited English Proficiency, Elderly, or Disabled and Who Are Successfully Enrolled in the Program, filed January 26, 2010.

and Disabled Telecommunications Program (DDTP) were initiated in March 2009 to begin leveraging the two programs. To assist in this effort, a Public Affairs representative will be available as a liaison between the two programs.

Additionally, data tracking, and record maintenance of enrollments for customers with disabilities continues to improve. In 2010, SoCalGas' HEAT system has been enhanced by making the disability status field a mandatory question to be entered during the data entry step of each enrollment. This requirement will help to minimize data entry errors and ensure accurate tracking of the disability status for each enrollment, which will help SoCalGas provide accurate reports of disability enrollments.

Another identified opportunity is to integrate disability enrollment efforts with the WNA by flagging Medical Baseline participants on WNA canvassing lists. Flagging Medical Baseline participants will help SoCalGas capture information about customers with disabilities and likely high energy users.³⁵ This would reinforce to outreach contractors that SoCalGas is committed to meeting the goal of enrolling 15% of customers with disabilities into the LIEE Program. Therefore, in addition to mandating disability reporting in the HEAT system, contractors will be required to report new enrollment disability status as accurately as possible.

However, there may still be situations when customers in a household have a disability that is not visible to the contractor, and the customer does not self-identify as having a disability. The situation described is a

³⁵ D. 08-11-031 Conclusion of Law 8 states, "The IOUs should use more aggressive outreach to target high energy users (and customers with late payment histories and on medical baseline), though not to the exclusion of low energy users.

challenge in which SoCalGas seeks resolution³⁶. SoCalGas' LIEE Program will continue to look towards increasing efforts to enroll and track customers with disabilities to meet the 15% goal.

1.6. Leveraging Success Evaluation, Including LIHEAP

D.08-11-031 defines leveraging as “an IOU’s effort to coordinate its LIEE Programs with programs outside the IOU that serve low-income customers, including programs offered by the public, private, non-profit or for-profit, local, state, and federal government sectors that result in energy efficiency measure installations in low-income households”. Progress will be measured by tracking the following criteria:

- *Dollars saved.* Leveraging efforts are measurable and quantifiable in terms of dollars saved by the IOU (Shared/contributed/ donated resources, elimination of redundant processes, shared/contributed marketing materials, discounts or reductions in the cost of installation, replacement, and repair of measures, among others are just some examples of cost savings to the IOU).
- *Energy savings/benefits.* Leveraging efforts are measurable and quantifiable in terms of home energy benefits/ savings to the eligible households.
- *Enrollment increases.* Leveraging efforts are measurable and quantifiable in terms of program enrollment increases and/or customers served.

For a list of programs LIEE leveraged with in PY2009 and savings calculations based on the criteria above, see attached LIEE - Table 14.

³⁶ A PFM will be filed to request modification of D.08-11-031 to allow optional language on written program applications and other documents to allow customers to self-identify as having a disability, and help SoCalGas better identify disabled customers.

1.6.1. Describe the efforts taken to reach out and coordinate the LIEE Program with other related low-income programs offered outside the IOU that serve low-income customers.

In PY2009, SoCalGas completed an agreement with the Imperial Irrigation District (IID) to leverage the benefits of their low-income programs. A leveraging agreement with Burbank Water and Power (BWP) was initiated in 2009 and signed in 2010. SoCalGas will administer the IID and BWP partnerships, using LIEE contractors. The Imperial Irrigation District will install electric measures while SoCalGas will install LIEE gas measures. BWP will install electric and water measures while SoCalGas will install LIEE gas measures.

In August 2009, SoCalGas met with Los Angeles Department of Water & Power (LADWP) to begin development of an agreement whereby customers residing in the utilities' overlapping service territories would benefit from both SoCalGas' LIEE Program and from LADWP's low-income program. Similar to agreements secured by SoCalGas with IID and BW&P, SoCalGas seeks to partner with LADWP, the largest municipal utility in the nation, to install not only the comprehensive mix of measures offered in SoCalGas' LIEE Program, but to also deliver additional water and electric measures from LADWP. Finally, SoCalGas and LADWP are working to include their respective EE departments in the agreement to ensure that customers who do not qualify for low-income programs receive benefits from any number of the utilities' energy savings programs.

As a result of this effort, LADWP and SoCalGas customers should realize the benefits of reduced gas, electric, and water usage in bill savings and comfort at home. In addition, the collaborative effort put forth to deliver the benefits of multiple programs during one visit should provide a more time sensitive solution to customers' needs. SoCalGas and LADWP will

continue their efforts to establish an agreement that best serves their mutual low-income customers.

In addition to the work with the three municipal utilities discussed above, SoCalGas has collaborated with various other municipal utilities, water agencies, city, county and state stakeholders to increase leveraging opportunities and reduce program costs, raising program awareness and increasing customer enrollments. To this end, SoCalGas has entered into discussions with several non-IOU utilities that provide electric and water services to customers in SoCalGas' service territory including, Anaheim Electric, Glendale Water and Power, Pasadena Water and Power, Metropolitan Water District, Central Basin Municipal Water District, and others to identify opportunities to leverage one another's low-income energy efficiency and water conservation programs. By identifying leveraging opportunities, SoCalGas is also working towards identifying and reaching additional customers to serve through the LIEE Program.

1.6.2. In addition to tracking and reporting whether each leveraging effort meets the above criteria in order to measure the level of success, please describe the Other Benefits resulting from this particular partnership not captured under the 3 criteria described above.

In PY2009, SoCalGas finalized an agreement with IID. In first quarter 2010, SoCalGas finalized its agreement with BWP, which includes data sharing. SoCalGas will implement program delivery to joint customers in 2010. With the future implementation of the leveraging programs, SoCalGas will track related LIEE savings and benefits to the LIEE Program. As discussed above, in Section 1.61., SoCalGas also has a pending agreement with LADWP, and leveraging savings and benefits will be tracked. Furthermore, SoCalGas will give special attention to the three criteria established by the Commission on: dollar savings, energy savings/benefits, and enrollment increases. However, since IID, BWP,

and LADWP program delivery has not yet begun, savings and benefits have not yet begun to be realized.

SoCalGas gained outside relationships with several community organizations and agencies to leverage LIEE services with other EE and home retrofit programs. SoCalGas relied on its LIEE Contractor Network to build and enhance relationships with grass-roots and community centered groups within their communities. One example of this is how, The East Los Angeles Community Union (TELACU), a SoCalGas LIEE Contractor, acted as a bridge between SoCalGas and CSI SASH Program. SoCalGas leveraged with Grid Alternatives by providing LIEE measures in homes receiving solar installations. D. 07-11-045 requires the installation of LIEE program measures on homes qualified for solar photovoltaic systems prior to those systems being installed to ensure maximum load reduction is achieved, and SoCalGas supported this requirement by working with Grid Alternatives. Through program leveraging, SoCalGas provided LIEE services to the nine homes that also received solar installations. In addition, a WNA was conducted around the Grid Alternatives identified homes and LIEE services were offered to the surrounding neighborhood. More on this collaboration between SoCalGas and CSI is described in Section 1.7.6.

SoCalGas also conducted a larger-scale WNA in the city of Wasco, leveraging efforts with State Assemblyman Danny Gilmore, PG&E, and the city. The WNA effort included a community event, and a news conference was held to promote the LIEE Program. Three Bakersfield TV stations covered the news conference. The benefits of this leveraged promotion are mostly related to raising customer awareness, because with outside endorsements and greater broadcasting of LIEE services more customers will understand and trust the benefits of the Program. Cross promotion leveraging with Los Angeles Department of Public Social

Services, which also raises customer awareness of the LIEE Program, is discussed in Section 1.4.2.

SoCalGas collaborated with local community organizations implementing home improvement programs through Federal Community Development Block Grants (CDBG). In the City of Monrovia, Reliable Energy Management Company (REMCO) and LA Works teamed with Los Angeles County Workforce Development Partnership and leveraged CDBG funds. SoCalGas also leveraged with the Community Handyman Program in the City of Commerce, to install LIEE measures in low and moderate-income homes receiving home renovations. Without leveraging these services some homes may not have seen energy savings through the Community Handyman Program alone. In PY2009, SoCalGas teamed with a local volunteer agency, Volunteers of East Los Angeles (VELA). In total, SoCalGas LIEE Program gained two enrollments through VELA. SoCalGas conducted a WNA campaign around the leveraged homes so that LIEE services were offered to neighboring homes.

Finally, SoCalGas collaborated with the Housing Authority of Los Angeles and Habitat for Humanity, to discuss ways to bring the respective program services to LA residents. In addition, the discussions included the topic of reaching underserved and rural areas.

1.6.3. Please provide a status of the leveraging effort with CSD. What new steps or programs have been implemented for this program year? What was the result in terms of new enrollments?

In PY2009, SoCalGas met with representatives from DCSD, its Energy Council, the Energy Division staff, and other IOUs periodically throughout 2009 to discuss leveraging efforts between DCSD and the IOUs. Each Utility participated in workgroups and created models for LIHEAP leveraging that could be shared between the utilities as well as

the Statewide LIHEAP agencies. SoCalGas will continue to participate in these meetings to build additional effective leveraging opportunities with the LIHEAP Program.

SoCalGas improved LIEE/LIHEAP leveraging by increasing LIEE services of Community Enhancement Services (CES) to include Enrollment & Assessment. CES has developed a 100% leveraging model and SoCalGas is working with CES to increase production using this model.

SoCalGas enhanced its information technology to encourage successful accounting of LIHEAP leveraging efforts. During PY2009, the HEAT system was updated to simplify record keeping of LIHEAP leveraging. As a result, there is now single click selection process on the database for contractors to identify homes that were leveraged with LIHEAP. This option simplifies the data entry process for LIEE contractors and also allows SoCalGas to easily track LIHEAP leveraging efforts. Based on data obtained from the HEAT system, a total of 491 enrollments were gained through LIHEAP referrals.

SoCalGas is also enhancing its tracking of LIHEAP leveraging through the HEAT database in order to produce reportable results. SoCalGas has already begun significant technological enhancements in order to improve data capturing and reporting for LIHEAP leveraging. SoCalGas is evaluating processes that will allow contractors to provide information on the results of leveraging efforts with LIHEAP at a measure level on a per home basis. The process will be implemented on a trial basis with participating LIHEAP agencies that are currently working in the LIEE contractor network and the results of these efforts will be used to assist the remaining LIHEAP agencies with efficiently incorporating tested and proven leveraging efforts.

1.7. Integration Success Evaluation

According to D. 08-11-031, "Integration constitutes an organization's internal efforts among its various departments and programs to identify, develop, and enact cooperative relationships that increase the effectiveness of customer demand side management programs and resources. Integration should result in more economic efficiency and energy savings than would have occurred in the absence of integration efforts."

1.7.1. Describe the new efforts in program year to integrate and coordinate the LIEE Program with the CARE Program.

In PY2009, SoCalGas built upon existing CARE and LIEE Program integration and collaboration utilized in previous years. One example of an enduring successful practice is the LIEE Program's use of CARE participant database information in developing mailing lists used to conduct direct mail and bill insert campaigns

specifically targeting potential LIEE customers in underserved areas. Also as a continued practice, LIEE contractors received CARE participant data in their canvassing lists. LIEE Contractors continue to provide non-CARE customers CARE information at every enrollment. New for PY2009, SoCalGas enhanced its LIEE marketing by targeting CARE participants living in underserved areas with LIEE automated voice messaging campaigns. These campaigns had a dual benefit for LIEE; by both quickly increasing the program's general level of awareness and increasing participation.

The joint LIEE-CARE development and November release of the new SoCalGas customer assistance e-newsletter "Outreach Around the Region," was a success in PY2009 as it provides a new avenue to highlight various important aspects of the CARE and LIEE Programs to key community organizations and their members. Over 1,200 CBO contacts received this electronic publication. The outreach and collaboration will continue in 2010, as an avenue to promote the LIEE and CARE programs through joint marketing and shared resources.

SoCalGas' LIEE and CARE outreach departments joined forces at the four Commission-sponsored WeCARE³⁷ events conducted in April 2009, helping to minimize marketing costs and increase the level of assistance provided to attendees. SoCalGas conducted WNA in the surrounding communities of the WeCARE Week events in Bakersfield and South Los Angeles. Also in PY2009, joint LIEE-CARE mass media (print & radio) campaigns known as the "hardship campaigns" were conducted in February and December. The hardship campaigns targeted general market and Hispanic low-income customers, and are further discussed in Section 2.4.1 of this report.

1.7.2. Describe the new efforts in program year to integrate and coordinate the LIEE Program with the Energy Efficiency Residential Program.

SoCalGas' LIEE Program and the general Residential EE Programs worked diligently to coordinate their programs so their customers could receive benefits from both programs seamlessly. The objective for integration in PY2009 was designed to lay the foundation and establish general processes and procedures between LIEE and EE that could be adhered to in subsequent years. The most impactful step in leveraging the two programs is directing potentially eligible low-income customers toward the LIEE Program. Reaching low-income customers prior to the receipt of EE installations prevents potential issues with the "Three Measure Minimum" standard that is a component of the LIEE Program. For example, if a low-income customer receives a measure through one of the EE Programs before LIEE enrollment, then subsequently that customer may not qualify for enrollment into the LIEE Program (if after EE installations there are less than three feasible LIEE installation measures

³⁷ The Commission and the IOUs conducted WeCARE California Resource Fairs to help raise awareness to consumers on ways they can save money, such as through the California Alternate Rates for Energy (CARE) program and LIEE Program.

remaining). Therefore to preempt the noted issue, coordinating leveraging so that LIEE Program eligibility is reviewed first, is essential to maintaining customers' opportunities to achieve additional energy and cost savings found in the comprehensive mix of LIEE measures.

On numerous occasions throughout PY2009, participants at outreach events including but not limited to, community events, trade shows, and other SoCalGas sponsored events, signed up to receive an EE Home Energy and Water Savings kit. In 2009, LIEE and EE put in place a process where prior to sending out the savings kits to customers, customers that had a high probability of LIEE Program eligibility would be extracted from the sign-up lists, including those customers on the CARE Program and those residences located in low-income PRIZM codes. Customers extracted from the original list would then be contacted and offered enrollment into the LIEE Program. If for any reason a customer was not eligible or did not enroll into the LIEE Program, they would be referred back to EE so that a Home Energy and Water Savings kit could be mailed to them.

In addition to being able to sign up for savings kits at EE outreach events, customers can also visit SoCalGas' EE website and request a savings kit on-line and have it sent to their residence, or request delivery of an EE Home Energy Efficiency Survey (HEES) by mail or email. As with the list of customers from EE outreach events, prior to sending out savings kits these customer lists are forwarded to LIEE so that customers with a high probability of being eligible for the LIEE Program are sorted out in order to contact them and offer enrollment into the LIEE Program. Again, any customer that is found to be ineligible for the LIEE Program is referred back to the EE Program so that they are sent a savings kit and ultimately receive services from one of SoCalGas' EE Programs.

The final effort that LIEE developed in PY2009 was to enhance the visibility of the advertisement-like LIEE Program banner (and link) posted on the SoCalGas EE's webpage, which directs potential low-income customers that express an interest in energy conservation to the LIEE Program webpage. This effort is intended to drive energy conscious customers who might be eligible for the LIEE Program to visit the LIEE webpage prior to registering for general EE services. While on the LIEE webpage³⁸ customers receive an overview of the LIEE Program, including information on how to qualify for the program and a list of potential no-cost energy efficiency measures available to LIEE customers.

1.7.3. Describe the new efforts in program year to integrate and coordinate the LIEE Program with the Energy Efficiency Government Partnerships Program.

In PY2009 the SoCalGas utilized its contacts from its Public Affairs (PA) Department to broaden the scope of the LIEE Program in order to pursue greater energy and cost savings opportunities for customers that enroll into the LIEE Program. SoCalGas PA representatives were instrumental in arranging meetings with various city, county, and state contacts with the goal of expanding LIEE Program visibility and success. The LIEE Program did not coordinate with the Energy Efficiency Government Partnerships Program to accomplish objectives, which it believed overlapped with the PA Department's pursuit to leverage with state and local governments. However, in the future the general energy efficiency "Energy Efficient Government Partnerships Programs" may prove essential to the LIEE Program's continuous efforts to explore and develop external associations that will benefit its low-income customers.

³⁸ <http://socalgas.com/energyefficiency/home.html>.

1.7.4. Describe the new efforts in program year to integrate and coordinate the LIEE Program with any additional Energy Efficiency Programs.

Along with the efforts LIEE put forth to increase coordination with the EE Residential Program, LIEE also worked with the general EE's Third Party Programs multi-family segment to screen multi-family complexes that house residents with a high probability of being eligible for the LIEE Program. The multi-family segment of EE's Third Party Programs is a program where contractors directly install energy and water savings measures into multi-family complexes. This general EE Program does not target customers by income. Therefore, a potential exists for some low-income customers to have been treated under the program. Due to the "Three Measure Minimum" standard set within the LIEE Program, if a low-income customer were to receive these measures through this direct installation program, then that customer could become ineligible for the LIEE Program (as the residence may no longer need at least three LIEE measures).

To manage the potential missed LIEE integration opportunity, a process was devised in PY2009 where the program contractors that install EE measures at multi-family complexes will first send the sites targeted for installation to the EE Third Party Program Manager for review. Upon receiving the list of targeted sites, the EE Program Manager will share the list with the LIEE Program to screen those complexes that have residents with a high probability of being eligible for the LIEE Program. Those multi-family complexes that are screened and removed from the list of targeted sites will be given to LIEE Program contractors to contact and enroll residents from those complexes into the LIEE Program. This effort is to ensure that all eligible low-income customers are given the opportunity to achieve the maximum energy and cost savings offered by the LIEE Program.

1.7.5. Describe the new efforts in program year to integrate and coordinate the LIEE Program with the Demand Response Programs.

There is no demand response program for residential gas customers, so this section is not applicable to SoCalGas.

1.7.6. Describe the new efforts in program year to integrate and coordinate the LIEE Program with CSI Programs.

In PY2009, SoCalGas collaborated with TELACU, one of its LIEE contractors that teamed with Grid Alternatives to enroll participating CSI households into the LIEE Program. Grid Alternatives manages the SASH Program on behalf of the Commission. The collaboration noted above supported the Commission's adopted energy efficiency requirement that (LIEE) eligible applicants must enroll in the LIEE Program prior to receiving a solar incentives³⁹. The combination of LIEE measures and solar installations provided more energy savings to households than what would not have occurred without collaboration between CSI and LIEE Programs. Through this program leveraging, SoCalGas provided LIEE services to the nine customers receiving solar installations. This coordinated effort between SoCalGas and Grid Alternatives was followed-up up with a WNA campaign, and therefore households surrounding the Grid Alternative homes in the same Zip-7 area were offered SoCalGas' LIEE Services.

³⁹ D. 07-11-045 section 6.1.

1.8. Workforce Education & Training

1.8.1. Please summarize efforts to improve and expand LIEE workforce education and training. Describe steps taken to hire and train low-income workers and how such efforts differ from prior program years.

SoCalGas helped to improve and expand LIEE workforce education and training by making improvements to the delivery of its enrollment and assessment classes, as well as expanding the technical content of its weatherization and NGAT training classes. SoCalGas also provided guidance to Los Angeles Trade Technical College (LATTC) on its existing energy efficiency training programs. SoCalGas consulted with other organizations, such as Los Angeles City College, Los Angeles Conservation Corps, the Infrastructure Academy, Taller San Jose and several WorkSource Centers to discuss WE&T program development and to provide LIEE program information and the utility-specific LIEE training programs.

As mentioned in Section 1.8.2, SoCalGas staff provides a 5-day enrollment and assessment training class to its LIEE contractor representatives. Outreach specialists, who are referred by the LIEE contractors, must complete training before they can receive an identification badge to work under the SoCalGas LIEE Program. The majority of Outreach specialists are sub-contractors and not considered hired employees of the LIEE contractors. Nevertheless, they play a primary role in providing outreach services to potential customers through enrollment and assessment.

In PY2009, the enrollment and assessment class was streamlined by separating the aptitude test from the classroom instruction time. In previous years, the aptitude test was administered on the first

day of the 5-day training class. The aptitude test is now offered two weeks prior to the enrollment and assessment class and a student must pass the

test before they can enroll in the training class. Changes to the process have resulted in increased pass rates for the enrollment and assessment class. Also, in order to accommodate the higher demands for the enrollment and assessment training, SoCalGas doubled its monthly class offerings.

SoCalGas also provides initial and refresher training for weatherization, HVAC and NGAT. The contractor representatives are hired employees of the LIEE contractors and are expected to arrive with the skill sets required to complete installation services. Installers are also given an aptitude test that they must pass in order to receive an identification badge to work under the SoCalGas LIEE program. This is in addition to a review of customer service standards and expectations.

In PY2009, SoCalGas created a separate 5-day NGAT training session from its existing weatherization and HVAC training. The inclusion of additional measures such as the pilot retrofit kit and Clean & Tunes increased the need for a higher level of technical skills. The required NGAT training supplements on-the-job training provided by the hiring contractors.

SoCalGas worked with LATTC to focus additional WE&T efforts on a Summer Workforce Partnership from June to August 2009. Upon completion of a two-week course, students participated in a panel interview with LATTC and SoCalGas staff for placement with LIEE contractors. Students submitted resumes to the panel to gain experience in resume preparation and interview presentation.

LATTC was the winning bidder as the Southern California representative on the WE&T pilot. LATTC partnered with TELACU and CES as their industry partners and with SoCalGas as their IOU partner. The WE&T pilot efforts included development meetings, industry ride-alongs, and identification of LIEE program areas to be included in LATTC's training

curriculum. The WE&T pilot will continue in 2010 with scheduled classes in January and March.

All SoCalGas LIEE program services are provided by third party contractors and the SoCalGas LIEE Contractor Network includes both private and CBOs who recruit employees from low-income communities. The LIEE training programs supported by SoCalGas are critical in maintaining a high quality of service for LIEE customers as well as for program implementation.

1.8.2. Please list the different types of training conducted and the various recruitment efforts employed to train and hired from the low-income energy efficiency workforce.

SoCalGas worked with LATTC in June to provide resources and input on development of their weatherization training for LATTC students. LATTC sponsored a two-week course that included both LIEE and LIHEAP standards. SoCalGas taught a 3-day segment that included key principals of energy efficiency, weatherization and customer service skills. The students that participated in this training acquired in-class and hands-on weatherization and customer service skills applicable to occupations in the growing green job industry.

SoCalGas also worked with LATTC on the WE&T pilot in order to create a pipeline that will place trained students within the LIEE Contractor Network. TELACU and CES have committed to offer students on-the-job training and for potential job placement in PY2010.

SoCalGas continued its internal training programs which provides two areas of training: 1) Enrollment and Assessment (E&A) and 2) LIEE Operations. SoCalGas also requires contractors to ensure that their employees are trained in the jobs that they perform. As mentioned in Section 1.8.1, all LIEE program services are provided by third party contractors. Thus, the students who attend these training classes are hired

by the LIEE contractor network. Outreach specialists are usually subcontractors to the LIEE contractors and may not be hired employees. However, the potential Outreach specialist must still be successful in passing the required training and background check. The LIEE Contractor Network pulls the majority of its labor resources from the local areas it services, including the low-income communities within the SoCalGas service territory. PY2009 training results are shown in the table below. SoCalGas issues badges to all Contractor Network personnel who successfully complete E&A and/or LIEE Operations training. The number of badges that are issued are tracked along with training results.

Type of training or recruitment conducted	Employees trained	Employees hired ²
Outreach and Assessment Training ¹	310	Not Applicable
LIEE Operations Training Classes (includes initial and refresher classes) ³	729	Not Applicable
<p>¹ Total number of students that attended the enrollment and assessment classes. The majority of LIEE outreach specialists are considered sub-contractors to the LIEE contractors.</p> <p>² SoCalGas does not hire employees to provide weatherization services. The students that attend classes are hired by SoCalGas LIEE contractors.</p> <p>³ Field Operations training includes initial training for all new participants in weatherization, inspections, HVAC and NGAT. SoCalGas also provides refresher training primarily to address contractor issues and discuss new measures and procedures that have been implemented into the program.</p>		

1.9. Legislative Lighting Requirements Status

Section 1.9 is not applicable to the SoCalGas LIEE Program.

- 1.9.1.** Provide a summary on current and future CFL supply issues, as experienced by the IOU. Any current / future problems as well as potential solutions should be discussed in this paragraph.
- 1.9.2.** Provide a summary explaining how IOU promotes the recycling/ collection rules for CFLs.
- 1.9.3.** Complete Table 16 (in Appendix). In addition, please briefly summarize the CFL procurement process for the IOU, including manufacturers, distributors, warehousing, and contractor delivery.
- 1.9.4.** Provide a summary of IOU activities in preparation for a draw down of CFL-supporting subsidies at the end of the 2009-2011 cycle, and where, as experienced by the IOU, they feel new lighting technologies could be used in the LIEE Program

1.10. Studies

- 1.10.1.** For each Study, provide 1) a summary describing the activities undertaken in the study since its inception; 2) the study progress, problems encountered, ideas on solutions; and 3) the activities anticipated in the next quarter and the next year.

2009 Impact Evaluation Study: The 2009 Impact Evaluation is a statewide study managed by the Commission's Energy Division staff. SCE is the contract administrator for the project. The objective of the Impact Evaluation research is to provide electric and natural gas savings estimates by measure, utility, dwelling type, climate zone, and other relevant dimensions of the PY2009 LIEE Program. It is anticipated that the results will provide data to quantify the PY2009 program achievements and document the relative value of various measures in producing energy savings.

As of the end of 2009, the following activities had taken place: An RFP was written and approved by the Joint Utilities⁴⁰ and Energy Division in June 2009; the RFP was distributed in July 2009; EcoNorthwest was selected as the contractor for the project in August 2009. EcoNorthwest is working with several sub-contractors, one of which includes the contractor that conducted the PY2005 LIEE Impact Evaluation. A project kick-off meeting was held in September 2009. The research plan was presented at an initial public workshop held in November 2009. The Joint Utilities provided customer data to the contractor in December 2009 and January 2010. A sample plan was finalized for the survey data collection effort (one component of the project) in January 2010. An initial draft of the participant survey instrument was circulated in March 2010.

During the second quarter of 2010, the Joint Utilities anticipate that survey data will be collected for LIEE participants and non-participants, on-site audits will be conducted, and some initial billing analyses will be completed. The engineering analyses of selected measures and additional billing analyses on all of the measures will be conducted during the third quarter. The Joint Utilities anticipate remaining on schedule to receive the final report on the project in December of 2010.

Joint Utility 2009 LIEE Non-Energy Benefits Study: The Non-Energy Benefits (NEBs) Study is a statewide study managed by SDG&E. The Study is designed to be conducted in two phases. The first phase, currently underway, seeks to provide a literature review describing the use of NEBs throughout the energy industry and to recommend an approach for updating the estimation of NEBs and incorporating them into the required cost effectiveness tests for the LIEE Program. The second phase

⁴⁰ SDG&E, SoCalGas, SCE and PG&E

of the study, expected to start in 2010, will provide updated calculations for estimating the NEBs used in the LIEE Program.

To date, the following activities have taken place: an RFP for Phase I of the Study was written and approved by the participating utilities and the Energy Division in June 2009, and the RFP was then distributed the same month. In July 2009, Skumatz Economic Research Associates (SERA), located in Boulder, Colorado, was selected as the contractor for the project, and SERA's subcontractor on the project is The Cadmus Group, located in Portland, OR. A project kick-off meeting was held in San Diego in August 2009. A subsequent follow-up meeting was held in San Francisco in October 2009, and the project tasks and schedule were finalized later that month. A draft literature review was presented in December 2009.

During the first quarter of 2010, the Joint Utilities anticipate finalizing the deliverable that includes the literature review and recommendations for Phase 2. Once finalized, a public workshop will be scheduled to present the results. During the second quarter of 2010, the Joint Utilities anticipate finalizing the Phase 1 report and developing the work scope for Phase 2.

Process Evaluation: The 2009 LIEE Process Evaluation Study is a statewide study managed by PG&E. The Process Evaluation will assess the effectiveness of the current LIEE Program and develop recommendations for program design and delivery that will improve the effectiveness of the program. The primary deliverable is a final report that will present the findings and recommendations for possible program changes; however, the Joint Utilities are also seeking usable information and recommendations as the evaluation progresses, so that LIEE program managers can get timely feedback.

The 2009-2011 LIEE Program includes several new components, such as the whole neighborhood approach and a statewide ME&O awareness campaign. The 2009 Process Evaluation will give the Joint Utilities and the Commission a first opportunity to understand how these new approaches are impacting key Commission and utility program objectives, so that program elements can be fine-tuned to increase program participation and effectiveness.

In the first quarter of 2010, a RFP will be sent out for the LIEE Process Evaluation Study. After the successful bidder has been selected, the study is scheduled to begin in the second quarter 2010. The Final Report will be completed by January 2011, and this study will provide results that will be used to develop the 2012-2014 LIEE Program Applications.

- 1.10.2.** If applicable, submit Final Study Report describing:
1) Overview of study; 2) Budget spent vs. authorized budget; 3) Final results of study; and 4) Recommendations.

The Joint Utilities Study pilots mentioned above have not been completed.

1.11. Pilots

- 1.11.1.** For each Pilot, provide 1) a summary describing the activities undertaken in the study since its inception; 2) the study progress, problems encountered, ideas on solutions; 3) the activities anticipated in the next quarter and the next year; and 4) Status of Pilot Evaluation Plan (PEP).

D.08-11-31 authorized the installation of up to 250 high efficiency natural gas Forced Air Units (FAU) in low-income customers' homes, where space heating needs were at or above 300 therms for the winter season. Following the 2008-2009 winter season, SoCalGas collected data from its Customer Information System. The data captured low-income, single-family homes whose space heating needs were at or above 300 therms for the 2008-09 winter season for further screening. These customers were further screened to identify customers whose homes had been weatherized

in 2008. Between March and May of 2009, SoCalGas LIEE contractors contacted potential HE FAU pilot customers that were identified by SoCalGas and worked internally to confirm eligibility with the HE FAU pilot guidelines. Eligibility was based on criteria such as the efficiency and operational status of the home's existing furnace unit, type of dwelling, and homeownership status. Only homes with an Annual Fuel Utilization Efficiency (AFUE) rating of 70 or lower were selected for participation in the FAU pilot.

After finalizing a list of 500 potential customers, LIEE contractors worked to arrange for installation of high-efficiency FAU furnaces. A larger number of potential customers were identified in anticipation that some customers would not want to participate or would no longer be eligible. SoCalGas contractors worked to complete the installation of FAU furnaces in the homes of 41 customers by December 2009. The high-efficiency forced air units installed in customers' homes had an AFUE rating of 92 or higher.

Most of the furnace installations were completed in time for the start of the 2009-10 winter season so that participants would receive immediate and enduring benefits from improved energy efficiency, reduced gas energy usage, and lower gas utility bills. LIEE contractors also pre and post inspected the furnaces, ensuring customer safety related to the new gas appliances.

Beginning in May 2010, SoCalGas will collect and analyze data from the FAU Furnace Pilot, utilizing data from the 2009-2010 winter season to determine gains in energy efficiency garnered from the FAU furnaces installed under the pilot. SoCalGas will employ a bill analysis to compare natural gas space heating energy usage before and after the installation of the high-efficiency FAU furnaces, and will also utilize a bill analysis to determine the cost effectiveness for each furnace installation.

The final pilot report will include an overview of the FAU pilot, a description of the Pilot Evaluation Plan, an analysis of the budget spent vs. the budget authorized, the final results of the pilot including energy savings, solutions to problems encountered in the pilot process, recommendations for adoption of the pilot statewide, and changes needed in order for the pilot to be expanded successfully. SoCalGas will also evaluate if the pilot measure meets a Modified Participant Cost (PC_m) test and Utility Cost Test (UCT)⁴¹ cost-benefit ratio greater than or equal to 0.25. SoCalGas will complete the evaluation of the effectiveness and success of the pilot by June 2010, with an eye towards making recommendations for its implementation on a state-wide scale.

1.11.2. If applicable, submit Final Pilot Report describing: 1) Overview of pilot; 2) Description of Pilot Evaluation Plan (PEP); 3) Budget spent vs. authorized budget; 4) Final results of pilot (including effectiveness of the program, increased customer enrollments or enhanced program energy savings); and 5) Recommendations.

Section 1.11.2 is not applicable for PY2009.

1.12. “Add Back” Measures

For measures that fall below the cost effectiveness threshold under D. 08-11-031, we require additional reporting to show the cost, energy savings impacts, and related metrics.

⁴¹ The cost-effectiveness approach adopted by the Commission in D.02-08-034 directed the application of the UCT and the PC_m.

1.12.1. If the "add-backs" compromise the IOUs' ability to meet the 2020 Plan goal that 100% of eligible and willing customers will have received all cost effective LIEE measures, how does the IOU propose to address the shortfall in other parts of the LIEE Program?

SoCalGas does not believe that the inclusion of “add backs” in the current program will impact the utility’s ability to meet the 2020 plan goal that 100% of eligible and willing customers will have received all cost effective LIEE measures. The total count and expenditures related to “add back” measures are provided in Table 18. As SoCalGas does not currently anticipate any impacts to the program, it will continue to install the “add back” measures, when feasible.

2. CARE Executive Summary

CARE is a low-income ratepayer assistance program providing qualified residential customers and qualifying group living facilities a 20% discount on their monthly energy bill. In addition, those that qualify and are approved within 90 days of starting new gas service also receive a \$15 discount on the Service Establishment Charge (SEC). The program is funded through a Public Purpose Program (PPP) surcharge paid through non-participating customers’ energy bills. The CARE⁴² Program was established through a legislative mandate and was implemented by the Commission in 1989.

⁴² Between 1989 and 1995, CARE was known as the Low Income Ratepayer Assistance Program (LIRA).

2.1. Participant Information

- 2.1.1. Provide the total number of residential CARE customers, including sub-metered tenants, by month, by energy source, for the reporting period and explain any variances of 5% or more in the number of participants

TABLE 1		
Residential CARE Program Gas Customers by Month		
PY2009	CARE Customers	Percentage Change
Jan	1,441,382	0.42%
Feb	1,450,810	0.65%
Mar	1,458,525	0.53%
Apr	1,481,315	1.56%
May	1,493,227	0.80%
Jun	1,494,052	0.06%
Jul	1,510,316	1.09%
Aug	1,520,244	0.66%
Sep	1,531,174	0.72%
Oct	1,534,382	0.21%
Nov	1,542,309	0.52%
Dec	1,560,543	1.18%

SoCalGas did not experience any month-to-month variations in CARE customer participation of more than five percent in 2009. However, the number of CARE participants increased each month in 2009.

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

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

CARE eligibility for PY2009 was developed using the joint utility methodology approved by the Commission in D.01-03-028. This method entails annual estimation of CARE eligibility at the small area (block group, census tract, zip) for each utility as well as for the state.

Sources for this estimation include the Commission’s current CARE income guidelines, current year small area vendor distribution on household characteristics, Census Public Use Microdata Sample (PUMS) 2005-2009 American Community Survey (“ACS/PUMS,” U.S. Census and Integrated Public Use MicroData Series (“IPUMS-CPS,” Minnesota Population Center, University of Minnesota); Labor Market Information Data (“EDD/LMID,”) California Employment Development Department and additional vendor data sources, including projected small area unemployment data from Synergos Technologies, Inc. and Environmental Systems Research Institute, Inc.

Each quarter SoCalGas applies the county and utility level eligibility factors to its current set of residential meter counts, for CARE this includes both the metered and sub-metered housing units. Once the factors are applied, an estimate of income-eligible customers is generated.

In D.06-12-038, the Commission granted the IOUs’ request to file the annual CARE eligibility estimates on October 15th of each year. On October 15th, 2008, SCE submitted the updated estimates on behalf of the IOUs.

2.1.2.2. 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.).

A count of all active residential meters and residential sub-metered units, minus residential accounts with billing tariffs that do not qualify for CARE, is used to derive the number of eligible

residential meters (i.e., households). By using tariff rates as the criteria for counting, all non-eligible master-metered accounts were not included in the CARE-eligible meter count.

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

Estimated CARE-eligibility rates, developed as described in the response to question 2.1.2.1 above, were applied to the current count of CARE-eligible meters, developed as described in the response to 2.1.2.2 above, to the estimated number of CARE-eligible households to estimate the number of CARE-eligible households in SoCalGas' service territory.

2.1.2.4. Describe how current CARE customers were counted.

Each month SoCalGas calculates the number of CARE customers based on the total number of residential customers billed monthly on the CARE rate plus all participating tenants in sub-metered facilities.

Although residential sub-metered customers are not billed directly by SoCalGas, SoCalGas maintains the information of all participating tenants in sub-metered facilities. The sub-metered CARE customer count is included in the total number reported monthly as part of SoCalGas' Monthly Reports on Low-Income Assistance Programs.

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

The formula for calculating CARE-participation rates is:

Number of CARE Customers
Number of Estimated CARE-Eligible Households

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

SoCalGas is a single energy-source utility (natural gas). At year-end 2009, 33.51% or 1,772,015 of SoCalGas' 5,288,682 residential meters were estimated to be eligible for the CARE discount.

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

At year-end 2009, SoCalGas had 144,430 sub-metered tenants in 1,820 master-meter facilities. Assuming 33.51% of its residential customers are eligible for CARE. SoCalGas estimates that 48,398 of its sub-metered tenants are CARE-eligible.

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

At year-end 2009, SoCalGas had 47,917 sub-metered tenants participating in the CARE Program.

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

SoCalGas estimates that 99.00 % of the CARE-eligible sub-metered tenants were enrolled in the CARE Program at year-end 2009.

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

SoCalGas did not encounter any significant problems in administering the CARE Program for sub-metered tenants or master-metered customers in PY2009. Although, there were two key CARE requirement changes pertaining to sub-metered and/or master-metered customers that did affect the administration of the program.

The first change affected the recertification for sub-metered CARE tenants. Previously, sub-metered CARE tenants were required to recertify their eligibility annually. In 2008, SoCalGas requested Commission authorization to make the CARE Program requirements for sub-metered tenants in master-metered facilities consistent with the requirements for individually-metered residential customers, (i.e. two years or four years).⁴³ In D.08-11-031, the utilities were authorized to start allowing sub-metered tenants to recertify their CARE eligibility every two years⁴⁴, beginning in 2009. CARE tenants on a fixed income would recertify every four years. Since this decision changed the recertification period from an annual requirement to every two years, there were no recertification activities in 2009 for sub-metered CARE participants.

The second change was the implementation of Assembly Bill (AB) 2857⁴⁵ which allowed sub-metered tenants at partially sub-metered facilities to become eligible for the CARE rate. Identifying these customers was an on-going task performed by SoCalGas' Billing and CARE departments.

⁴³ Application (A) 08-05-025 Prepared Direct Testimony of Carmen Rudshagen on Behalf of SoCalGas' California Alternate Rates for Energy Program Plans and Budgets for Program Years 2009-2011 at page CAR-5.

⁴⁴ At pg.189.

⁴⁵ AB2857 prohibits the Commission from denying eligibility for the CARE program for a residential user of gas or electric service who is a resident or tenant served by a master-meter customer on the basis that some residential units in the master-meter customer's multiple rental complex are not sub-metered.

This process required new procedures and training for the staff. The CARE department is responsible for ensuring eligibility of these applicants and for routing them to the Billing Department for manual tracking and for billing to the facilities with the correct number of spaces at the CARE rate.

2.2 CARE Program Summary

2.1.1. Please provide CARE Program summary costs

CARE Budget Categories	Authorized Budget	Actual Expenses	% of Budget Spent
Outreach	\$3,647,684	\$3,335,764	91%
Proc., Certification and Verification	\$1,173,027	\$1,192,617	102%
Information Tech./Programming	\$489,451	\$567,825	116%
Pilots			
Measurement and Evaluation	\$16,237	\$22,954	141%
Regulatory Compliance	\$222,130	\$221,785	100%
General Administration	\$566,635	\$518,709	92%
Commission Energy Division Staff	\$171,500	\$44,613	26%
Cooling Centers	N/A	N/A	N/A
Total Expenses	\$6,286,664	\$5,904,266	94%
Subsidies and Benefits	\$132,846,122	\$97,290,607	73%
Total Program Costs and Discounts	\$139,132,786	\$103,194,873	74%

For PY2009, SoCalGas over expended its budget in three cost categories: Processing, Certification and Verification, Information Technology (IT) and Measurement and Evaluation (M&E).

- The Processing, Certification and Verification overage amount was small and due to additional labor hours needed during May, July and December.
- The IT overage was due to costs required to revise SoCalGas' computer-generated CARE forms as well costs to improve the system enrollment process to expand the list of programs under which customers categorically enroll in CARE. These costs were not anticipated when SoCalGas filed its 2009-2011 Application.
- The M&E overage was strictly due to the 2006-2008 CARE Eligibility Estimates, for which SoCalGas was not billed for

until 2009 and for payment of the vendor final invoice for the Low Income Needs Assessment Study⁴⁶ billing costs in 2009, which were not included in SoCalGas' 2009-2011 Application. The stated amount reflects SoCalGas' 25% share of the cost of the project.

2.1.2. Please provide the CARE Program penetration rate to date.

CARE Penetration⁴⁷			
Participants Enrolled	Eligible Participants	Penetration rate	Target Met? ⁴⁸
1,560,543	1,772,015	88.1%	No

2.1.3. Report the number of customer complaints received (formal or informal, however and wherever received) about their CARE recertification efforts, and the nature of the complaints.

The following is a summary of the complaints and comments received during 2009 on the CARE recertification process.

CARE Recertification			
Month	Complaints Received	Nature of Complaint	Cases Resolved
March	5	Customers called about the Automated Voice Message (AVM) system. Customers requested to be placed on the "Do Not Call" list.	Yes
May	1	Customer was removed from the CARE rate due to a late response to a recertification request. Customer recommended that the recertification deadline be placed on the utility bill to prevent this. Customer was recertified and placed back on the program.	Yes
June	1	Customer stated that she followed the telephone prompts on the AVM and the information was presented in Spanish instead of English.	Yes

⁴⁶ Authorized by D.06-12-038 and corrected in D.07-06-004.

⁴⁷ Year-End 2009.

⁴⁸ D.08-11-031, O.P. 89 "the IOUs shall strive for CARE penetration levels of 90%".

		Customer was recertified and placed back on the program.	
July	4	Three customers requested to be placed on the "Do not call list" One customer stated that he received a recertification application in Spanish. Customer was recertified over the phone.	Yes
August	7	Customer stated that he followed the telephone prompts on the AVM and the information was presented in Spanish instead of English. Customer was recertified over the phone. Two customers stated that the AVM system said they did not qualify for the program. Customers were recertified over the phone. Four customers stated that they wanted to be placed on the "Do Not Call" list. Customers were recertified over the phone.	Yes
September	2	One customer stated that the AVM kept repeating her last name and then switched from English script to Spanish. CARE representative verified customer had already been recertified and the AVM call was made in error. One customer claims she received a recertification application, but that she believed she had already been recertified by the AVM system. Customer was recertified over the phone.	Yes
October	2	One customer recertified his eligibility through the Interactive Voice Response (IVR) process and then called to verify the recertification. The customer was recertified over the phone. One customer stated the font size on the recertification form was too small. The customer was recertified over the phone.	Yes
November	1	Customer stated that he did not receive the recertification form and requested another form be sent. A CARE recertification form was sent to the customer.	Yes
December	1	Customer claimed that the CARE recertification form did not come with a return envelope. Customer was called and recertified over the phone.	Yes

2.3. CARE Program Costs

2.3.1. Discount Cost

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

The average monthly discount received per SoCalGas CARE customer in 2009 was \$5.18⁴⁹ per month.⁵⁰

- 2.3.1.2.** State the annual subsidy (discount) for all CARE customers by energy source.

SoCalGas' CARE customers and expanded CARE customers received \$93,366,187 in natural gas rate discounts and \$3,924,420 in SEC discounts in 2009. The 2009 annual subsidy for all SoCalGas CARE customers exceeded \$97.2 million.

2.3.2. Administrative Cost

- 2.3.2.1.** Show the CARE Residential Program's administrative cost by category.

See section 2.2.1 or CARE - Table 1 in the attachments.

⁴⁹ The average monthly rate discount was computed by dividing the CARE rate discount recorded to the CARE balancing account in 2009 by the monthly residential CARE customers: the total of the 12 months was then divided by 12 for the average monthly CARE discount per customer.

⁵⁰ Does not include the CARE customers who received a discount on their SEC.

2.3.2.2. Explain what is included in each administrative cost category.

Outreach: Included within this category are costs for the printing and mailing of CARE applications and correspondence, the printing and mailing of Senate Bill (SB) 920⁵¹ annual notification, postage, bill inserts, brochures, flyers, advertising, direct mailing campaigns, telephone campaigns, web campaigns, third party outreach, community event sponsorships and support, distribution of collateral materials, outreach staff labor, and other outreach and enrollment efforts. Capitation payments and any agency-related outreach support efforts are also included in this category. Capitation payments are compensation fees paid to CBOs that assist SoCalGas in enrolling hard-to-reach CARE-eligible customers in the program.

Processing, Certification and Verification: Costs include the CARE Processing Group labor and data scanning costs. The function of the CARE group includes: 1) opening and sorting CARE application forms; 2) processing all CARE applications; 3) initiating and responding to customers' inquiries regarding CARE applications and or the program; and 4) tracking CARE enrollment and operating statistics in support of operations, management, and regulatory reporting.

Information Technology /Programming: Included in this category are IT staff costs to maintain the SoCalGas CARE application billing system, CARE documents, CARE database, system reports, data exchanges with other utilities: to conduct

⁵¹ SB 920 requires that homeowners and residents of a master-metered park shall receive notification in their utility billing statement of the assistance available to them under the CARE program. This notification must be received on or before February 1st of each year.

system enhancements to comply with Commission mandates; and improve operational efficiency.

Measurement and Evaluation: This category includes costs for the annual CARE eligibility rate updates and the Needs Assessment.

Regulatory Compliance: These costs include labor and non-labor costs for the preparation and filing of various regulatory filings including: program applications, advice letter filings, comments and tariff revisions, preparation of reports and studies; attendance at working group meetings, and public input meetings and other Commission hearings or meetings.

General Administration: General administration costs include program management labor, office supplies, market research, and general business expenses.

Commission Energy Division Staff Funding: This category includes costs incurred by Energy Division staff in support of the Commission's authorized low-income programs.

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

At year-end 2009 the CARE balancing account was over-collected by \$9.8 million.

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

The recorded costs in the CARE balancing account include the SEC discount, all rate discounts, surcharge revenues, amortization

and interest and the Administrative costs described in Section 2.3.2.2.

There are no CARE Program costs recorded in base rates.⁵² All CARE program costs are recovered through SoCalGas' PPP surcharge.

- 2.3.5. 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 CARE - Table 10 in the attachments.

2.4. Outreach

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

In an effort to continue to provide exceptional service to our low-income customers, SoCalGas focused on increasing CARE Program participation and awareness through the use of mass media, targeted mailing, automated messaging, bill inserts, door-to-door promotion and community outreach.

Mass Media "General": SoCalGas used various forms of mass media including radio, TV, print (newspapers and magazines), direct mail, bill inserts, bill messages, internet communications, AVM, community events and telethons to inform customers of both the CARE Program benefits and associated eligibility

⁵² D.05-04-052, OP.19 authorized the utilities to recover call center costs in base rates. No call center costs may be charged to the CARE program.

guidelines. Media messages were communicated in English, Spanish, Chinese (Mandarin), Korean and Vietnamese. These messages were also sent to niche channels which targeted seniors and African American customers. Cross promotion with other Customer Assistance (CA) energy programs and events were used whenever possible to increase program awareness and reduce costs.

- **Univision ‘A Su Lado’ CARE Telethon:** On three occasions, April 22, October 13, and December 15, 2009, SoCalGas and SCE coordinated three-hour telethons on KMEX-TV (Univision, Los Angeles) “A Su Lado” to assist low-income customers by inviting them to call in to apply for CARE. Each utility provided bi-lingual representatives to answer viewer phone calls. Over 900 CARE/LIEE leads were generated as a result of the telethons. Customers expressed gratitude for “the utilities going on TV and advertizing their available discounts”. They truly appreciated the invitation to call and have their questions answered by a live representative.

Targeted Mailing: In response to current economic conditions, SoCalGas expanded its use of targeted direct mail for program enrollment purposes, and in 2009 sent out 944,000 total pieces during four separate campaigns. Recipients of CARE direct mail consisted of a mixture of eligible customers, and those potentially eligible due to recent unemployment or work furlough that live throughout SoCalGas’ service area. All campaigns are bi-lingual (English & Spanish) and incorporate a probability model to cost effectively select customers for direct mail response. For 2009, direct mail efforts produced a 10% response rate resulting in 52,000 new enrollments. Continual concentration on high gap (income/program eligibility) demographic profiling, coupled with historical trend and correlation analysis enables this methodology to

remain an effective outreaching medium for increasing CARE Program enrollment.

- **Grassroots Outreach:** This technique is used by SoCalGas to raise overall public awareness of the CARE Program and to identify low-income customers who traditionally have not responded to other less personal forms of program outreach. By leveraging SoCalGas' relationships with local politicians, CBO, news outlets and internal personnel, events are held throughout the service territory to both enroll CARE customers and inform the community of the multiple energy-related assistance programs available to them. Local politicians, along with print, radio and television media, are invited to these outreach events to further expand their effectiveness. Press releases describing the events are also developed and distributed to SoCalGas mass media contacts. Below are some examples of SoCalGas' 2009 grassroots outreach efforts:

- **April 1, 2009** - SoCalGas sponsored and participated in the 2009 Montebello Chamber of Commerce Business Exposition, with an emphasis on providing local businesses and community members with resources and information during these rough economic times. There were over 1,000 attendees and SoCalGas showcased its energy efficiency, CARE and LIEE Programs.
- **April 20th – 25th WeCARE** – The Commission, SoCalGas and the LADWP and IID joined efforts to assist 1,000 South Los Angeles residents at the WeCARE California, Los Angeles Resource Fair. The Los Angeles Resource Fair, one of four major community assistance events conducted by SoCalGas during the week long WeCARE California campaign, was held at the All Peoples

Christian Center, a well established local CBO with deep community ties. The event was preceded by a comprehensive week long mass media blitz promoting the resource fair on local radio stations, in newspapers, magazines and through flyer distribution to thousands of K-12 students. The event was kicked off by presentations from SoCalGas' executive officer in charge of Customer Solutions, Commission Director, Denise Tyrell, LADWP Commissioner, Forescee Hogan-Rowles and the Los Angeles Unified School District Board President, Monica Garcia. The event was covered by various local media throughout the day including KRCA-TV, LA City View TV and KNX AM 1070. Nearly 1,000 low-income attendees received information from over 40 exhibitors concerning the utilities' customer assistance programs, personal finances and various social programs. In total, SoCalGas organized and participated in four separate WeCARE Resource Fairs during the week of April 20th to 25th, with the other locations being in Bakersfield, Long Beach and El Centro. These joint efforts required a significant amount of resources and coordination from several internal SoCalGas and Commission departments and resulted in hundreds of the state's most needy residents getting the assistance they need at the peak of California's economic collapse.

- **Mass Media “Campaigns”:** In PY2009, SoCalGas conducted three separate CARE communication campaigns which ran during the months of February, March-April and December. These campaigns included a mixture of radio, television and newspaper ads, as well as interactive web advertising, bill messages, and bill payment office solicitation. This strategy was designed to increase message awareness by leveraging the

effect of California's high unemployment rate with the heightened bill sensitivity typically experienced by SoCalGas customers during the winter months. The mass media activities included:

- **February “Hardship Campaign”:** During February, SoCalGas' CARE Program participated in a month long campaign which targeted general market and Hispanic low-income customers. The campaign utilized print based media channels to promote its assistance programs to customers living throughout its service area.

- **March:** SoCalGas conducted traffic radio advertising campaigns for their English and Spanish speaking customers. The objective of these campaigns was to build overall customer awareness of the CARE Program, while encouraging eligible customers to enroll. The strategy involved targeting the general market income-eligible adult customers (renters and homeowners), Hispanic customers, ages 18 and above and seniors. The geographic targets were cities within the following areas: City of Los Angeles, Orange, Riverside and San Bernardino counties. The media consisted of four weeks of 10 and 15 second opening billboards (live read by the radio station). In addition, a targeted print campaign was conducted in select senior publications to help reach elderly SoCalGas customers with the CARE Program message. The Asian component of the campaign utilized three weeks of top tier radio and TV station segments to reach SoCalGas' Chinese, Korean and Vietnamese (radio only) customers.

- **April:** New for 2009 was the addition of a four week English and Spanish on-line “interactive” campaign. This campaign utilized web based CARE banner ads located on social media sites like Facebook, Yahoo and Univision.com (Spanish only), to promote CARE Program awareness and enrollment.
 - **December: “Hardship Campaign”:** This was an extension of February’s campaign which again focused on SoCalGas’ General Market and Hispanic low-income customers. However, this campaign utilized traffic radio spots instead of print ads and encouraged customer response through specially designed customer assistance web pages which promoted SoCalGas’ assistance programs.
- **Customer Contact Personnel:**
 - **Customer Contact Center (CCC):** Customers are informed by the IVR system about the CARE Program when they call to request new service or payment arrangements. Customers may request a CARE application from a Customer Service Representative (CSR), the IVR or from SoCalGas’ website.
 - **Bilingual Employees:** The CCC, CARE Customer Support Center and most company business offices continue to be staffed with bi-lingual (English and Spanish) CSRs. Vietnamese, Korean, Mandarin and Cantonese telephone lines are staffed from 8:00 am to 5:00 pm Monday through Friday in the CCC. Additionally, SoCalGas CCCs provide service in 170 languages through *Language Line Service*, a

third-party translation service⁵³ which is available to customers 24 hours a day, seven days a week. For hearing impaired customers, a toll-free number is provided in English or Spanish. Deaf and hearing impaired customers may contact the CCC through its TTY/TDD equipment 24 hours a day, seven days a week.

- **Branch Payment Offices (BPO):** Both English and Spanish CARE applications and program information brochures are located in BPOs. Applications and brochures are provided to customers upon request. English and Spanish CARE posters (complete with program guidelines and helpful information) are on display in each BPO. These posters are revised as program information changes.

- **Bill Insert:** In PY2009, SoCalGas mailed CARE Program information in four separate bill inserts. The March, July and October bill inserts included a fully bi-lingual (English and Spanish) self-mailer postage-paid CARE application that qualified customers could complete and mail in to enroll in the CARE Program. During November, SoCalGas included a bill insert which provided information about the expanded CARE Program and instructed potentially qualified customers to contact the SoCalGas CARE department to receive an enrollment application.⁵⁴ SoCalGas' CARE bill insert campaigns remain a good performer and a favorite with low-income CARE customers. In PY2009, 49,000 CARE bill insert applications were returned by customers resulting in 30,000

⁵³ More information about Language Line Services can be found at <http://languageline.com>.

⁵⁴ The Expanded CARE program includes the non-profit group living facilities and homeless shelters, migrant and farm worker housing centers, qualified privately owned employee housing, and qualified non-profit housing for agricultural employees.

enrollments. The PY2009 CARE bill insert distributions were as follows:

- March – 3.7 million (system wide CARE-eligible non-enrolled customers)
- July – 3.7 million (system wide CARE-eligible non-enrolled customers with new program income guideline information)
- October – 1.3 million (CARE-eligible non-enrolled targeted bill insert sent to customers in LA County and local municipalities)
- November – 293,000 (targeted bill insert sent to all customers in the expanded CARE Program segment)
- **Bill Message:** CARE bill messages were printed in both English and Spanish on non-participating customers' bills, during February, May, July and October, 2009. Additionally, if applicable, CARE bill messages are sent out 45 days after a PEV letter is mailed to remind customers that SoCalGas has not received their verification application and proof of income. If after 120 days, SoCalGas has not received customer responses, SoCalGas sends customers a bill message, informing them that they have been removed from the program.
- **Direct Mail:** Direct mail continues to be a versatile and effective method for enrolling CARE customers. SoCalGas' direct mail efforts were significantly increased in 2009, due to California's continuing economic issues. To better address the high unemployment rate in SoCalGas' service area, modifications were made to the CARE direct mail strategy which resulted in larger campaigns which targeted a broader range of customer profiles. Enhancements were also made to the direct mail messages providing eligibility information for customers who were recently unemployed or work furloughed. During PY2009, SoCalGas conducted three primary direct mail

campaigns consisting of approximately 944,000 total pieces, which in turn resulted in a 10% return rate and produced 52,000 new enrollments. Each campaign is designed to target a unique geographic area and or customer segment. Targeting criteria for direct mail campaigns consist of geographic areas (zip codes) demonstrating a high probability of customer eligibility, along with various niche demographic markets further segmented by age, ethnicity, past program participation and recent program attrition. SoCalGas' direct mail is fully bi-lingual (English and Spanish) and is created in a scanner based format for efficient processing. Recent 2009 customer feedback indicates that SoCalGas' direct mail remains a preferred outreach tactic for CARE enrollment.

- **Direct Mailing to Sub-metered Apartments and Mobile-Home Parks:** SoCalGas continued to conduct its annual SB920 targeted mailing to 1,820 master-meter facilities with sub-metered customers in PY2009. SoCalGas also continued to work with master-metered facilities with sub-metered tenants to maintain compliance with both AB 2140⁵⁵ and AB 2857. There are currently 144,430 units represented by these customers and PY2009 sub-metered CARE Program participation was 47,917 at year end.
- **Cross Program Promotion:** SoCalGas coordinates the communications for the CARE Program, as well as its other programs and services in a manner that provides clear, comprehensive and consistent messages to its customers.

⁵⁵ AB 2140, requires each utility providing CARE discounts to (1) develop processes whereby it directly accepts CARE applications from tenants of a mobile-home park, apartment building, or similarly residential complex, (2) develop processes whereby it directly notifies and provides renewal applications to tenants of a mobile-home park, apartment building, or similar residential complex, that are existing CARE customers, and (3) provide each master-meter customer that is subject to Section 739.5 with a list of tenants who are approved to receive discounts pursuant to the CARE program and that specifically identifies those tenants added to or deleted from CARE program eligibility since the previous billing cycle.

Communication and outreach opportunities are sought out to cross promote the CARE Program with other customer assistance programs and general market (rebate and or incentive) programs to maximize customer value and reduce costs. Mass media cross advertising campaigns incorporating both SoCalGas' CARE and LIEE customer assistance programs are conducted annually. The ability to apply for CARE through SoCalGas' LIEE applications makes it easier for customers to obtain services and other SoCalGas program information simultaneously. Customer information attained from SoCalGas' LIEE and Gas Assistance Fund (GAF) Programs, along with LIHEAP is used for CARE enrollment, recertification, and verification purposes. Certain collateral materials used by SoCalGas' outreach department and field operations personnel have been specifically designed to provide customers with information on all available low-income and special needs customer programs and services.

The following are examples of CARE cross program promotion:

- SoCalGas' LIEE agreement form includes a CARE Program signature block, allowing applicants to apply for both programs simultaneously. LIEE outreach workers are instructed to promote the CARE Program during their customer consultations. LIEE CSRs also have the ability to refer customers who inquire or show interest in the CARE Program to a dedicated CARE inbound line for information, literature or enrollment.
- SoCalGas customer assistance and residential customer brochures contain program information about SoCalGas' assistance programs and services available such as CARE, LIEE, Medical Baseline and GAF.
- CARE Program information is discussed and distributed during outreach events involving SoCalGas' LIEE Program, Diverse Market Business and Residential Rebate Program.

- SoCalGas' GAF and LIHEAP customer information is used to cross enroll and PEV approve eligible customers into the CARE Program.
- SoCalGas has data sharing agreements with SCE, SDG&E, PG&E, LADWP and the IID⁵⁶. Enrollment information is shared within each utilities joint service area.

Community Events: During PY2009, SoCalGas personnel participated in over 79 low-income community events and public forums. Criterion used to select these outreach opportunities were; multi-cultural appeal, income status, hard-to-reach communities, senior events, and those involving low-income parents and children. A goal of each event was to promote awareness and participation in SoCalGas' customer assistance programs and services and included:

- City of Florence-Firestone Lillian Elementary School Earth Day
- City of Indio Desert Springs Home & Garden Show
- City of Tulare World Agricultural Exposition
- City of Montebello-Commerce Rio Hondo YMCA Meeting
- City of Antelope Valley Assemblyman Warren Furtuani's "Opportunity Festival"
- Riverside County Fair & National Date Festival
- Los Angeles Convention Center Home Show
- City of Cudahay Safety Fair
- South Bay Cities Council of Governments Annual General Assembly Meeting
- South Gate Citizens Workshop

Approximately 240,000 low-income customers received information on SoCalGas' programs and services while attending events/forums in 2009, and some took the opportunity to enroll in the CARE Program during the events.

⁵⁶Data exchange with the IID is based on a SoCalGas LIEE cross program exchange process and not on a CARE Agreement. SoCalGas' CARE enrollment information is not provided to IID.

- **Web and Informational Brochures:** In PY2009, SoCalGas extensively promoted the use of the internet and the SoCalGas website to inform customers, key stakeholders, CBOs, and agencies about available customer assistance programs and services. Over 100 direct web links to SoCalGas' customer assistance web page were added from the web sites of various local government agencies and organizations residing in our service area. Web pages included the site of the 4th District Supervisor Gary Ovitt's of San Bernardino County, the City of Colton and Senator Roy Ashburn's web page. This was also accomplished by including the website address (www.socalgas.com) in all program literature and most mass media communications. Website content is monitored to provide customers with up-to-date information. Program brochures have a special section promoting customer e-mail use for correspondence. CARE website information is available in English, and Spanish and downloadable PDFs in Arabic, Armenian, Chinese (Mandarin), Hmoob, Farsi, Khmer, Korean, Russian, Tagalog, Thai and Vietnamese. CARE website information is also available for visual and/or hearing impaired customers in large font print as well as the TTY/TDD and *Language Line Service* (170 languages) which customers may call to receive information about the CARE Program 24 hours a day, 7 days a week. Over 59,000 CARE applications were downloaded by SoCalGas customers from the CARE website, resulting in 27,802 enrollments and 10,072 recertifications. In PY2009, SoCalGas' web based outreach efforts included monthly e-mail blasts consisting of targeted electronic newsletters and e-mails promoting the CARE Program, and a new customer assistance newsletter "Outreach Around the Region" that was launched in

December. In addition to enhancements made to SoCalGas' internal website, customer assistance program and service information continues to be added to the growing California 211 information and referral network. The 211 county-based agencies who have been provided with SoCalGas' customer assistance and general utility information include Fresno, Imperial (Sure Helpline) Kern, Kings, Los Angeles, Orange Riverside, San Bernardino, Santa Barbara, San Luis Obispo, Ventura and Tulare, bringing the total now to thirteen including Los Angeles City's' 311s Program. The 211 and 311 information was made available to SoCalGas customers on the individual county internet sites. This information was also provided to customers who called in and spoke with 211/311 call center operators.

- **Community-Based Organizations Association:** In 2009, SoCalGas worked with 35 CBOs and outreach agencies to enroll eligible non-participating customers in the CARE Program. These "CARE Capitation Contractors" are located throughout the SoCalGas service area and employ various types of outreach strategies, such as limited door-to-door solicitation, local community event participation, walk-in enrollment and program material distribution to enroll customers. Total customer CARE Program enrollments from these contractors in PY2009 were 1,509.
- **Leveraging with Local Government Programs:** SoCalGas uses the expertise and alliances of its Regional Public Affairs Managers and Community and Public Relations departments to help promote the CARE Program. By working with local, city and county officials and assistance agencies throughout the service area, these spokespersons enable SoCalGas to extend its program message to many hard-to-reach customers. In

2009 these SoCalGas' representatives communicated the CARE Program message at local government meetings, community events, public access televised sessions, in public service announcements, and in government and organizational newsletters. They were responsible for linking SoCalGas' customer assistance web page to the internet sites of over 100 agencies and organizations.

Leveraging with GAF⁵⁷: SoCalGas' GAF Program provides a one-time bill assistance amount of up to \$100 on a qualified customer's winter natural gas bill.

The one-time bill payment assistance is available to eligible customers on a first-come, first-served basis. The program typically begins in February and continues through the end of March, or until funds are depleted.

GAF is a program that, for more than two decades, has helped thousands of SoCalGas customers, including the elderly, newly unemployed, or those with disabilities, who are struggling to pay their gas bills. This program is funded by voluntary contributions from SoCalGas customers and shareholders. United Way administers the program on behalf of SoCalGas, through its network of more than 90 community based agencies. SoCalGas solicits customer contributions for GAF in the October/November bill inserts, and SoCalGas shareholders match those contributions, generally on a dollar-for-dollar basis, up to \$250,000. In 2009, shareholder funds totaled \$300,000 and SoCalGas shareholders contributed an additional \$50,000 to increase assistance to income qualified customers.

⁵⁷ GAF is a shareholder-customer funded program that provides bill payment assistance (grants) to qualified customers.

In 2009, GAF disbursed over \$513,000 and helped more than 6,200 customers pay their gas bill. Since its inception in 1982, the GAF Program has provided more than \$12.6 million in financial assistance to families in need.

Customers applying for GAF must prove their income eligibility when they apply. Customers approved for GAF are not subject to SoCalGas' CARE post-enrollment random verification process. CARE customers who are scheduled for recertification and who are approved for GAF assistance are not asked to recertify their CARE eligibility again until the next two year recertification cycle has lapsed. This process helps reduce barriers to participation and assists in retaining qualified customers in the program.

Leveraging with LIHEAP: SoCalGas and DCSD have an informal agreement that provides for the automatic enrollment of LIHEAP customers into the CARE Program. SoCalGas customers who receive LIHEAP payments are automatically approved for the CARE Program.

2.4.2. Discuss the most effective outreach method, including a discussion of how success is measured.

Recent program experience has shown that SoCalGas CARE-eligible customers respond to a wide variety of communication channels and no one particular outreach method can realistically be considered the best. Each program year the SoCalGas CARE outreach strategy integrates several different outreach methods into their marketing plan to: 1) enroll the greatest number of participants, 2) at the lowest cost with 3) the highest level of customer satisfaction. Outreach efforts are primarily conducted in English and Spanish. However, depending on the event, program information is available in English, Spanish, Chinese (Mandarin),

Vietnamese and Korean. Below are some of the primary outreach strategies used during 2009:

Automated Voice Messaging: For PY2009, SoCalGas' use of AVM for CARE enrollment and recertification outreach has proven to be both efficient and effective. AVM is a low-cost outreach method using an automated telephone script to quickly contact large numbers of SoCalGas customers, allowing them to check their program eligibility and enroll or re-enroll in CARE right over the telephone via the AVM system. Over 25,913 CARE enrollments and 32,242 recertifications were received using this method.

Bill Inserts: SoCalGas sent out over 8.7 million CARE (self-mailer type) bill inserts. This resulted in SoCalGas receiving 49,509 applications, which resulted in 27,945 CARE enrollments. Bill inserts continue to be a moderate cost, non-intrusive, high distribution (all CARE-eligible non-enrolled SoCalGas customers) outreach method for contacting potential CARE customers.

Capitation Program: SoCalGas contracted with 35 CBOs for the CARE Capitation Program in PY2009. These primarily non-profit agencies were very successful at contacting hard-to-reach customers at community events and through walk-in traffic, and generated 1,509 new CARE enrollments. Throughout the year, CARE capitation contractors also received timely program and information updates, such as rising gas prices and collateral materials from SoCalGas that they could pass on to their contacts.

Direct Mail: SoCalGas' efforts to target and reach relatively large numbers of highly eligible customers not currently enrolled in the CARE Program are often accomplished through the direct mailing of CARE applications. These customers are selected based on an adjustable eligibility profile that shows them to live in high gap (high eligibility and low penetration) areas. With a return rate of nearly 10% (typical

comparable response rates are 2% - 3%) and an enrollment rate of over 7% (approximately 50,000 enrollments) this outreach method continues to be a reasonably priced, versatile and very effective component of the SoCalGas outreach strategy.

Third Party Door-to-Door Outreach: Developed to outreach to SoCalGas' hardest-to-reach low-income customers, this proactive door-to-door enrollment tactic continues to be a key component of SoCalGas' marketing strategy. These outreach contractors produce high volume enrollments from a hands-on customer approach. For 2009, SoCalGas CARE enrollments from third party contractors totaled 51,691 enrollments.

Web Based Outreach: This fast growing, very low-cost and extremely versatile outreach method experienced significant enrollment growth during PY2009. Web based outreach consists of program promotion through e-newsletters, web links, e-mail blast campaigns, social media networks and direct internet access. For 2009, SoCalGas received over 59,000 customer submitted CARE applications by web which resulted in over 27,802 new enrollments and 10,072 recertifications.

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

For 2009, SoCalGas encountered many of the same barriers to participation for CARE that have been encountered in previous years. Some customers have an unwillingness to accept any subsidy because of pride. Some customers continue to have a fear of releasing personal information. Other customers prefer not to be contacted. For those customers, SoCalGas created a "Do Not Call" list. Customers who are added to this list are excluded from future calls. SoCalGas estimates that approximately 1,388 of the households in its service territory, believed to have a high probability of qualifying for CARE, have asked to be placed on its "Do Not Call" list which could be another indication that those on

the list may not wish to participate in the program. Other customers, despite SoCalGas' best efforts, are still unaware or unwilling to participate in the program.

In 2009, SoCalGas continued to work to overcome program participation barriers by 1) providing CARE collateral and website information such as applications and general customer assistance program information in five languages, 2) using culturally targeted print, radio and television mass media, 3) creating alliances with CBOs and agencies to increase awareness and participation, 4) using multi-type overlapping mass media campaigns and 5) participating in grass-root community events. SoCalGas customers can receive CARE applications in their bill, on the internet, from direct mail, referenced in a print advertisement, hand delivered to their house, picked-up at an outreach event, payment office or social agency or mailed to their house upon request. Customers can also use the SoCalGas TTY/TDD and *Language Line Service* (170 languages) to receive information on the CARE Program 24 hours a day, 7 days a week.

In an effort to respond to the changing customer population, SoCalGas continues to offer customer information in a total of 13 different languages. The SoCalGas website includes CARE information in Arabic, Armenian, Chinese, Farsi, Hmoob, Khmer, Korean, Russian, Tagalog, Thai, Spanish, English and Vietnamese.

SoCalGas' eligibility rate transfer program enables previously participating CARE customers to receive the program discounts without re-applying when they move. SoCalGas continues to leverage other assistance programs such as LIHEAP, LIEE, GAF, LADWP and other IOU CARE programs within the shared service territories, to increase CARE participation through the automatic enrollment process.

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

CARE Customer Data Exchange: SoCalGas continues to share its CARE customer data with SCE, SDG&E, and PG&E in their overlapping service territories. Customers enrolled in other utility CARE Programs but not in SoCalGas' program, are automatically eligible for SoCalGas' CARE Program. Customers are mailed a letter notifying them of the enrollment and provided the opportunity to opt-out of the program if they choose.

SoCalGas continued to electronically exchange new CARE customer enrollment data on a weekly basis with SCE, a process established in 2001. In 2009, SoCalGas received 445,691 customer records from SCE and enrolled over 23% of the records or 105,423 SCE CARE customers in SoCalGas' CARE Program. Customers who were not enrolled were either already in SoCalGas' CARE Program or were not SoCalGas customers.

SoCalGas had two CARE data exchanges with PG&E in 2009. These data exchanges resulted in 5,587 PG&E CARE customers being added to the SoCalGas CARE Program.

During 2009, SoCalGas had one data exchange with SDG&E. The exchange resulted in 294 SDG&E CARE participants to be added to SoCalGas' CARE Program.

For 2009, SoCalGas implemented data sharing efforts with LADWP to exchange the names of SoCalGas CARE participants with the names of customers participating in LADWP's Lifeline or Low-Income Discount Program (LIDP). SoCalGas also implemented data sharing efforts with IID to receive names of customers participating in IID's Residential Energy Assistance Program (REAP).

SoCalGas and LADWP finalized details for their data sharing requirements and manual data exchanges began in March. They exchanged names and addresses of 600 CARE participants and 432 LIDP participants as a trial run in April 2009. Fifty three customers or 12% of LADWP LIDP participants were not on CARE. The pilot demonstrated leveraging opportunities and both utilities are working towards an IT solution to streamline the data exchange process.

SoCalGas received information for 13,015 IID REAP customers. Out of those customers, 707 or approximately 5% were enrolled in SoCalGas' CARE Program. The remaining customers were either not SoCalGas customers or already participating in SoCalGas' CARE Program.

Joint-Utility Program Managers Meeting: SoCalGas, SCE, PG&E, SDG&E and a few of the Small Multi Jurisdictional Utilities (SMJU) continued to have quarterly joint utility meetings in PY2009 to discuss outreach efforts and program issues. Agenda items in the 2009 meetings included sharing experiences in CE expansion, phone enrollment, phone recertification, internet enrollment, successful outreach efforts, the Commission-sponsored WeCARE events, telethons, AB2857, post enrollment verification practices, process improvements, and quarterly CARE public meeting agenda information.

2.4.5. Discuss 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 customer information obtained from SoCalGas' LIEE and GAF Programs, along with LIHEAP is used for SoCalGas CARE enrollment, recertification, and verification purposes. SoCalGas believes that leveraging with other assistance programs is one of the most cost effective ways to increase CARE participation. This practice allows the SoCalGas

CARE Program to better utilize its resources to verify eligible CARE customers.

LIEE Data Sharing: SoCalGas' LIEE application includes a signature block for CARE that enables applicants to apply for both programs at the same time. In 2009, SoCalGas continued cross-referencing customers receiving LIEE benefits. Customers who are found in the LIEE system are automatically enrolled for the CARE discount and exempt from PEV if their eligibility has been verified by the LIEE Program. In 2009, SoCalGas automatically enrolled over 13,406 SoCalGas LIEE customers in CARE.

LIEE third party outreach workers provide customers with energy education material and CARE enrollment information. The outreach workers also explain the CARE Program's eligibility requirements to the customer. The outreach workers provide energy education packages to customers participating in the LIEE Program. During 2009, 85,147 energy education packages were provided to SoCalGas customers.

GAF Data Sharing: SoCalGas' GAF Program provides a one-time bill assistance amount of up to \$100 on a qualified customer's winter natural gas bill. The one-time bill payment assistance is available to eligible customers on a first-come, first-served basis. The program typically begins in February and continues through the end of March, or until funds are depleted.

Because GAF customers are eligible for CARE, SoCalGas' GAF customer data and CARE customer data are interfaced. Customers participating in the GAF Program but not in the CARE Program are automatically enrolled in CARE. In addition, because GAF customers provide proof of income when applying, customers approved for GAF are not subject to SoCalGas' CARE PEV process. Finally, CARE customers who are scheduled for recertification and who are approved for GAF assistance are not asked to recertify their CARE eligibility again until the next two year

recertification cycle has lapsed. This process helps reduce barriers to participation and assists in retaining qualified customers in the program.

During PY2009, SoCalGas added 940 GAF participants to the CARE Program and verified 5,054 CARE customers eligibility without requiring proof of income from the customers.

2.4.6. Describe the efforts taken to reach and coordinate the CARE Program with other related low-income programs to reach eligible customers.

CARE Program information is incorporated throughout SoCalGas' LIEE materials and information, including their annual winter print/traffic radio mass media campaign. CARE information is also cross promoted at community events featuring the LIEE and Medical Baseline assistance programs.

Promotion of CARE with other Low-Income Programs: In 2009, SoCalGas' CARE staff worked closely with representatives from the four Housing Authorities in Orange County; Orange County Housing Authority (OCHA), Garden Grove Housing Authority (GGHA), Anaheim Housing Authority (AHA) and Santa Ana Housing Authority (SAHA) to promote CARE to any existing Section 8 Housing participant not already receiving CARE and to all eligible new Section 8 recipients. GGHA will have approximately 70 Section 8 vouchers available in 2010. Each voucher recipient will receive a CARE informational packet and if necessary, will receive assistance by a GGHA representative in completing the CARE application. SAHA allowed SoCalGas to promote its CARE Program and include CARE applications in SAHA annual surveys, which were mailed to all participants in October 2009. SAHA also allowed SoCalGas to include basic CARE Program information in the surveys sent to their Section 8 property owners. Both OCHA and AHA agreed to provide all new Section 8 customers with CARE informational packets and assist customers in completing the forms when needed.

2.4.7. 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.)

In May 2000, DCSD and SoCalGas entered into an agreement that solidified the coordination of resources and program benefits between DCSD's LIHEAP and SoCalGas' CARE and GAF Programs. In June 2000, SoCalGas added the toll-free telephone numbers for LIHEAP (and LIEE) on the CARE applications. At the same time, SoCalGas began providing DCSD's toll free number to customers who call SoCalGas to request information on low-income assistance programs.

In September 2009, SoCalGas provided CARE customer information that was requested by DCSD for inclusion in the DCSD federal funds leveraging application.

2.4.8. 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.

During 2009, several changes were implemented or scheduled for future implementation by the SoCalGas CARE Program. These changes were designed to improve the cost-effectiveness of the program, processing of applications, and program delivery. SoCalGas continued to utilize technological advances to improve processing of applications and

telephone and web enrollment options to encourage CARE enrollment and increase program participation.

Probability Model: SoCalGas received authorization for the use of its probability model for CARE Recertification. SoCalGas CARE customers deemed more than 85% likely to be CARE-eligible are required to recertify their eligibility every four years instead of two years.

In 2009, approximately 155,929 CARE customers passed the CARE probability model and had their CARE eligibility automatically extended for an additional two years. Although the number of customers recertified through the probability model decreased by 48% in 2009, the decrease was anticipated since customers can only automatically extend once and need to recertify in four years. SoCalGas believes that the model is accurately targeting eligible customers and is a useful tool for reducing attrition of potentially eligible CARE customers.

SoCalGas also utilized its probability model to automatically verify CARE customers in 2009. Customers deemed most likely to be eligible for CARE were excluded from the PEV request, and are recertified every four years instead of every two years. Of those customers selected for PEV, 42,351 customers or 45.7% passed the CARE probability test and were de-selected from the PEV process. Starting in 2010, SoCalGas will also use its probability model to verify sub-metered CARE customers.

Recertification Request by Phone: The new four-year recertification process has minimized participation barriers, helped retain eligible customers in the program, and improved program effectiveness. Customers required to recertify their eligibility were contacted through mailings and could fulfill recertification requirements by mailing back the enclosed recertification form, or recertifying on-line, or using the CARE recertification IVR. From the positive experiences customers received during phone enrollments, SoCalGas expanded its out-bound dialing

campaigns to include CARE customer recertification. SoCalGas' CARE department initiated a pro-active approach by implementing a process to contact customers one month prior to their recertification date. This task was handled by a third-party AVM system. If customers were reached and provided the required information during the automated call, they were approved for recertification. If not, at the time of their scheduled recertification date, customers were mailed a recertification form with instructions to complete and return the form to SoCalGas or to recertify on-line. Customers may also recertify using the CARE recertification IVR system.

Online Applications: In 2009, SoCalGas continued to promote the use of the internet and the company website to educate customers about available customer assistance programs and services. All CARE applications were modified and updated to reflect expanded eligibility guidelines in addition to remaining available in large print format and in thirteen different languages. Web-based CARE applications improve cost-effectiveness by saving postage, paper, and printing costs. This process successfully enrolled and recertified 38,243 customers, compared to 20,328 in 2008. The 188% growth in 2009 proves CARE customers are using the internet option. SoCalGas will continue to promote on-line application and recertification and will seek further improvements to help increase customer use of the internet.

CARE Application Data Scanning: SoCalGas renovated its in-house CARE application scanning operation in 2008 that allowed: 1) electronic imaging of CARE documents which contributes to a paperless environment and 2) automatic capturing of application data for upload to SoCalGas' customer information database to determine CARE eligibility.

In 2009 many enhancements were made to the CARE forms to achieve scanner-friendliness and accommodate operation requirements. CARE applications were redesigned to simplify processing by replacing

handwritten fields with check boxes/bubble type fields. Directly mailing hard copy applications previously caused extensive manual labor for the CARE processing staff. However, in September 2009, the data scanning recognition process was significantly improved through form design and font change. The CARE department pre-populated customer's phone numbers on system generated applications so that customers could confirm their phone number in the Customer Information System (CIS) and reduce validation time during processing.

SoCalGas processed more than 655,000 forms in 2009. Of these, only 8% were by manual data entry, compared to 18% in 2008.

2.5. Processing CARE Applications

2.5.1. Describe the utility's process for recertifying sub-metered tenants of master-meter customers.

In December 2008, SoCalGas received authorization to permit sub-metered tenants to recertify their CARE eligibility every two years, or four years for CARE tenants on a fixed income, or who pass the Probability Model. An automated process replicates that of regular residential, including random selection of tenants for PEV and will be implemented in 2010.

SoCalGas pre-populates each application with the name of the facility, the account number, the tenant's name, address and space number; this was designed for ease of recertifying one's eligibility, thereby reducing attrition. The recertification application requires the number of household occupants, annual income or participation in an assistance program, signature, and date. The application is mailed back to SoCalGas in the postage paid envelope provided.

Tenants are allowed 90 days to respond to the recertification request. If the recertification is received after the 90 day timeframe, the tenant is re-

enrolled in CARE. Annually, each sub-metered facility is mailed a complete listing of its CARE tenants.

2.5.2. 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.

SoCalGas does not contract with third parties to conduct certification, recertification and/or verification on its behalf. SoCalGas processes and approves all CARE enrollment, recertification, and verification internally. Nonetheless, SoCalGas utilizes LIHEAP, LIEE, and GAF participant information to enroll, recertify, and verify CARE eligibility as described in sections 2.4.5 and 2.4.7. SoCalGas also utilizes PG&E, SDG&E, and SCE CARE participant information to enroll customers in the SoCalGas CARE Program as described in section 2.4.4. Finally, in PY2009, SoCalGas utilized both LADWP's and IID's low-income programs to enroll eligible customers as described in section 2.4.4.

In 2009, SoCalGas contracted with 35 CBOs and one outreach contractor to help eligible non-participating customers sign up for the CARE Program. The non-profit CARE Capitation CBOs employed a very beneficial one-stop-shopping approach by helping their clients complete a CARE application while also assisting the customers in enrolling in other programs they might be eligible for.

SoCalGas' CARE outreach contractors employed a variety of outreach strategies, such as door-to-door solicitation, local community event participation, and program material distribution to help customers sign up for CARE. Many of these customers do not typically respond to more traditional forms of outreach, do not visit CBO facilities and are very

receptive to door-to-door canvassing efforts. Total gross customer CARE enrollment from the Capitation CBOs was 1,509. Results from the outreach contractor's variety of outreach strategies exceeded expectations with 53,912 new enrollments.

2.6. Program Management

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

SoCalGas' CARE Program is managed according to Commission decisions and legislation. AB2857, two-year recertification policy for sub-metered CARE customers, and expanded CARE CE were three mandated changes to CARE in 2009. In addition, improvements were implemented based on the feedback from SoCalGas' outreach agencies, customers, and processing staff.

AB2857: D.08-11-031 ordered the IOUs to update their tariffs to comply with AB2857. AB2857 required all utilities to provide CARE eligibility to sub-metered customers regardless of whether or not the residential complexes were 100% sub-metered. SoCalGas initiated a direct mail campaign to inform customers of the expanded CARE eligibility and directed them to complete and return the form provided if their complex had sub-meters. This required SoCalGas to update its procedures related to billing and the Call Center to comply with the directive.⁵⁸

In December 2008, a CARE eligibility change notification was communicated to partially sub-metered customers with a rate of GME informing them that their sub-metered tenants would be able to apply for CARE in 2009.

⁵⁸ Advice Letter (AL) 3923 was effective May 21st, 2009 per Resolution G-3433.

Two-year Recertification: Previously, sub-metered CARE tenants were required to recertify their eligibility annually. In December 2008, SoCalGas received authorization to permit sub-metered tenants to recertify their CARE eligibility every two years with four year recertification requirements for CARE tenants deemed probable for CARE eligibility or on a fixed income. Additionally, sub-metered CARE tenants deemed probable for CARE eligibility would be exempt from PEV. Throughout 2009, SoCalGas' CARE Program management team worked with the IT department, completed all business and system requirements and engaged in thorough testing sessions to ensure the enrollment process in the system was fully compliant and ready for implementation by January 2010.

In an attempt to minimize confusion and keep affected customers up-to-date regarding changes in sub-metered recertification requirements, SoCalGas' CARE Program engaged in pro-active notification. Since these customers were accustomed to receiving recertification notices annually, SoCalGas issued letters explaining all of the changes and also notified customers that their recertification notices would now be issued on their 'anniversary date or CARE sign up date instead of mid-year as previous practice dictated. This information proved especially useful to customers since many reside in mobile-home parks and expect to receive recertification notices at the same time their neighbors do.

SoCalGas' CARE Program also notified the Call Center of the revised recertification requirements to further limit customer confusion or inconvenience.

Expanded CARE CE: D.08-11-031 directed the IOUs to immediately make all CE requirements applicable in the California Lifeline Program

the same as those for CARE⁵⁹. The Commission also required each IOU to make a reasonable effort to enroll only eligible public housing residents in the CARE Program. As a result, in 2009, the following public assistance programs were added to the CE roster: Tribal TANF, Head Start Income Eligible – Tribal Only, BIA GA, NSL, and SSI⁶⁰.

SoCalGas' CARE staff worked on both system and form changes needed for the new CE option and implemented the new approval process in September 2009. In addition, CARE CE requirement implementation also included web updates, CCC on-line help updates, CARE staff and CSR training, and communication with all CARE capitation and outreach organizations. Total implementation was successfully completed in October. Through web and data scanning technology, applications qualifying customers under the new CE Programs were processed with minimal flaws. Refer back to Section 1.4.2 for information on LIEE CE.

CARE Customer Service: SoCalGas continuously strives to meet the needs of its customers by providing a variety of methods for them to enroll. And while mailing back an application is still the preferred method, some customers prefer to use other mediums such as applying directly on-line at the Company's website. Customers may recertify their eligibility by sending in their recertification application, calling the IVR, or applying directly online. These three options are described on the recertification application. Also available to customers is the out-going call which is made to customers who are due for recertification. SoCalGas contracted with an outside vendor that calls customers, and through an automated series of questions, allows customers to respond and recertify their CARE eligibility.

⁵⁹ D.08-11-031, OP 7.

⁶⁰ AL 4008 was effective September 6th, 2009.

However, these advancements have caused some confusion for a few customers. Such was the case with the IVR system and outbound calls. On some occasions, customers called to say they made a mistake while pushing their phone buttons, and believed they inadvertently denied themselves. Through SoCalGas' on-going attempt to eliminate barriers to participation, a live representative took the necessary information over the phone and approved the account in CIS. To track this type of approval, the representative also entered a Source Code unique to CARE phone enrollment.

3. CARE Expansion Program

3.1. Participant Information

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

See CARE - Table 12 in the attachments.

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

As of December 31, 2009, there were 19,977 residents in the non-residential CARE Expansion Program facilities. There were 538 primary facilities with 675 associated satellites participating in the CARE Expansion Program at year-end 2009.

3.2. Usage Information

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

See CARE - Table 12 in the attachments.

3.3. Program Costs

3.3.1. Administrative Cost (Show the CARE Expansion Program's administrative cost by category)

For PY2009, SoCalGas incurred \$7,307 in Outreach expenses for the CARE Expansion Program bill insert. SoCalGas did not track administrative labor cost due to the small volume of new applications received and the fact that there were no recertification of the CARE expansion program accounts in 2009.

3.3.1.1. Discount Information

3.3.1.2. State the average annual CARE discount received per residential facility by energy source.

The annual discount received per participating CARE residential facility in 2009 was \$50.84.

3.3.1.3. State the average annual CARE discount received per commercial facility by energy source.

The annual discount received per participating CARE Expansion Program facility in 2009 was \$358.03.

3.4. Outreach

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

Utility Outreach: SoCalGas continued to utilize bill inserts and brochure distribution as effective means to communicate CARE Program information to expansion customers. Utilizing a recently re-designed market specific CARE bill insert sent out in November, 293,000 SoCalGas expansion customers (non-profit group living facilities, migrant farm worker housing centers and agricultural employee housing facilities) received targeted program information. The CCC also provided CARE Program information to non-residential group living facilities at the time

of service establishment and upon request throughout the year. The CARE Expansion customer enrollment application is also available on the SoCalGas website.

Third Party Outreach: For 2009, SoCalGas sent out over 293,000 targeted bill inserts promoting the CARE Program to the following facilities: non-profit group living facilities, migrant farm worker housing centers and agricultural employee housing facilities.

3.4.2. Discuss each of the following:

3.4.2.1. Discuss the most effective outreach method, including a discussion of how success is measured.

For 2009, the CCC continues to be the most effective outreach method for the SoCalGas CARE Expansion Program's non-residential facilities. Customers that call in to make payment arrangements, have their service established or request service activation talk with CSRs who present the CARE Program to them and respond to any questions the customers may have. Social service networks continue to be another valuable communication medium to promote CARE Program information to CARE expansion customers. The use of one-on-one or in-person dialogue sessions continues to make these two outreach methods very effective.

3.4.2.2. Discuss how the CARE facility data and relevant program information is shared by the utility with other utilities sharing service territory.

There was no CARE facility data sharing in PY2009.

3.4.2.3. Discuss barriers to participation encountered in the prior year and steps taken to mitigate these, if feasible, or not, if infeasible.

SoCalGas sought Commission authorization to change the CARE Expansion Program's recertification requirement for customers living in non-profit group living facilities, agricultural housing, and non-profit migrant farm worker housing, from a one year requirement to a two-year requirement in its application and was approved⁶¹. Most of these housing facilities were well-established CBOs, and it would be uncommon for them to change their missions and services within a year. Thus, a two-year recertification period would facilitate SoCalGas' efforts to retain these eligible CARE customers, some of whom might not otherwise recertify.

In addition, a CARE employee was assigned the task to review and process applications the same day they were received. This included follow-up phone calls or other correspondence for applications with missing information or documentation.

3.4.3. 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.

In prior years, CARE Expansion Program customers were required to recertify their CARE eligibility annually. Since all facilities continued to maintain their eligibility for the CARE Program, year after year,

⁶¹ D.08-11-031, OP 101.

SoCalGas determined that annual recertification of these facilities was too frequent. To retain CARE customers and eliminate unnecessary program requirements, SoCalGas instituted a two-year recertification requirement. These facilities will be recertified again in 2010. This newly adopted two-year recertification process requires less frequent processing of existing CARE accounts. This is expected to reduce processing costs and improve the cost-effectiveness of the program.

SoCalGas also considers the processing of CARE expansion applications to be cost-effective, provided that all necessary documentation is received and no additional follow-up with customers is required.

In order to maintain as many CARE expansion accounts as possible, when an expansion account closes and there is a new turn-on at the same facility, CARE proactively mails an application to the new customer.

3.5. Program Management

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

To retain CARE customers and eliminate unnecessary program requirements SoCalGas sought, and received Commission authorization to change the CARE Expansion Program's recertification requirement for customers living in non-profit group living facilities, agricultural housing, and non-profit migrant farm worker housing, from a one year requirement to a two-year requirement.

4. Fund Shifting

4.1.1. Report LIEE fund shifting activity that falls within rules laid out in Section 20.1 of D. 08-11-031

Category funds shifted in PY2009 are documented in LIEE - Table 19 in the attachments.

The overall PY2009 SoCalGas LIEE Program budget was not fully expended. However, category fund shifting was utilized to supplement over-expenditures. As the SoCalGas LIEE Program treated an unprecedented number of homes in PY2009, it spent 132% of its “Weatherization” budget and 112% of its “Inspections” budget. Unspent funds from the “Gas Appliances” budget covered Weatherization and Inspections budget over-runs. In D.08-11-031, the Commission allows the utilities the flexibility to “shift up to 15% of LIEE funds among budget categories with the exception that allocations may be to program areas only, not administrative overheads or regulatory compliance costs.”⁶² In addition Section 20.3.2.2. of D.08-11-031 states: “[T]o be clear, funds in the program categories Energy Efficiency, Training Center, Inspections, and Marketing can be shifted among these at the IOUs discretion.” SoCalGas will address budget reallocations, which require Commission review in accordance with D. 08-11-031.

SoCalGas’ weatherization budget includes measures that were not funded in the LIEE Program budget as authorized by D.08-11-031. The LIEE Program design presented in the SoCalGas Application proposed the installation of certain measures based on the customized energy audit. The intended purpose of the proposed customized energy audit was to determine which measures should or should not be installed in a customer’s home, based on each individual customer’s historical and claimed energy usage.⁶³

⁶² See Section 20.1. of D.08-11-031.

⁶³ SoCalGas proposed to identify customers by high usage (above baseline) and low usage (below baseline) and prioritize homes to be served and measures to be installed, according to SoCalGas’ proposed “tiered approach”.

OP 16 of D.08-11-031 directed the IOUs to pursue a “whole house approach” to meet LIEE customers’ needs, and stated that each eligible home would receive an individualized energy audit so that it would obtain all feasible measures necessary for maximal energy efficiency. However, under SoCalGas’ program proposal weather-stripping, and outlet gasket covers were excluded. To adhere to the Commission’s directive, in 2009 SoCalGas installed all feasible measures using the authorized budget and does not plan to seek additional program funds at this time to accommodate the additional measures for the 2009-2011 program cycle.

4.1.2. Report CARE fund shifting activity that falls within rules laid out in Section 20.1 of D. 08-11-031

The CARE program fund shifting that occurred in PY2009 followed the rules laid out in D. 08-11-031. See CARE - Table 13 in the attachments.

4.1.3. Was there any LIEE or CARE fund shifting activity that occurred that falls OUTSIDE the rules laid out in Section 20.1 of D. 08-11-031?

Please refer back to Sections 4.1.1 and Sections 4.1.2.

5. Appendix: LIEE Tables and CARE Tables

LIEE- Table 1- LIEE Overall Program Expenses

LIEE- Table 2- LIEE Expenses & Energy Savings by Measures Installed

LIEE- Table 3- LIEE Cost Effectiveness

LIEE- Table 4- LIEE Penetration

LIEE- Table 5- LIEE Direct Purchases & Installation Contractors

LIEE- Table 6- LIEE Installation Cost of Program Installation Contractors

LIEE- Table 7- Expenditures by Cost Elements

LIEE- Table 8- Detail by Housing Type and Source

LIEE- Table 9- Life Cycle Bill Savings by Measure

LIEE- Table 10- Energy Rate Used for Bill Savings Calculations

LIEE- Table 11- Bill Savings Calculations by Program Year

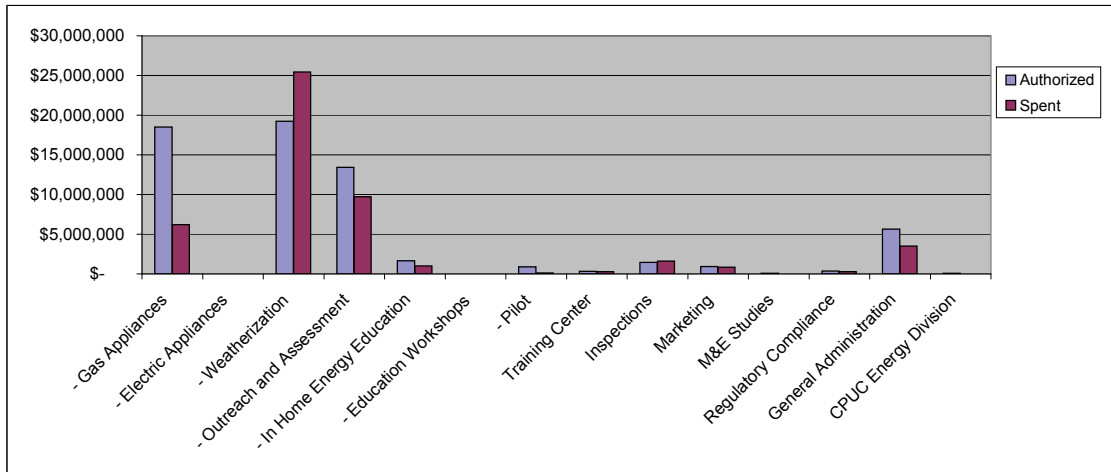
LIEE- Table 12- Whole Neighborhood Approach
LIEE- Table 13- Categorical Enrollment
LIEE- Table 14- Leveraging
LIEE- Table 15- Integration
LIEE- Table 16- Lighting
LIEE- Table 17- Studies & Pilots
LIEE- Table 18- “Add Back” Measures
LIEE- Table 19-LIEE Fund Shifting
CARE- Table 1- CARE Overall Program Expenses
CARE- Table 2- CARE Enrollment, Recertification, Attrition, and Penetration
CARE- Table 3- CARE Verification
CARE- Table 4- Self Certification and Re-Certification
CARE- Table 5- Enrollment by County
CARE- Table 5- Capitation Contractors
CARE- Table 6- Recertification Results
CARE- Table 7- Capitation Contractors
CARE- Table 8- Participants per Month Fund Shifting
CARE- Table 9- Average Monthly Usage & Bill
CARE- Table 10- CARE Surcharge & Revenue
CARE- Table 11- CARE Capitation Applications
CARE- Table 12- CARE Expansion Program
CARE- Table 13- CARE Fund Shifting

PY2009 Low Income Energy Efficiency Annual Report
LIEE Table 1
LIEE Overall Program Expenses
SOUTHERN CALIFORNIA GAS COMPANY

LIEE Program:	2009 Authorized Budget			2009 Annual Expenses			% of 2009 Budget Spent		
	Electric	Gas	Elec & Gas-Authorized	Electric	Gas	Elec & Gas-Spent	Electric	Gas	Elec & Gas
Energy Efficiency									
- Gas Appliances		\$ 18,519,164	\$ 18,519,164	\$ 6,204,532	\$ 6,204,532			34%	34%
- Electric Appliances		\$ -	\$ -	\$ -	\$ -			0%	0%
- Weatherization		\$ 19,242,434	\$ 19,242,434	\$ 25,444,239	\$ 25,444,239			132%	132%
- Outreach and Assessment		\$ 13,429,131	\$ 13,429,131	\$ 9,712,062	\$ 9,712,062			72%	72%
- In Home Energy Education ¹		\$ 1,662,960	\$ 1,662,960	\$ 1,000,155	\$ 1,000,155			60%	60%
- Education Workshops		\$ -	\$ -	\$ -	\$ -			0%	0%
- Pilot		\$ 868,507	\$ 868,507	\$ 109,834	\$ 109,834			13%	13%
Energy Efficiency TOTAL		\$ 53,722,196	\$ 53,722,196	\$ 42,470,821.98	\$ 42,470,822			79%	79%
Training Center		\$ 307,670	\$ 307,670	\$ 300,074	\$ 300,074			98%	98%
Inspections		\$ 1,444,354	\$ 1,444,354	\$ 1,613,332.44	\$ 1,613,332			112%	112%
Marketing		\$ 933,592	\$ 933,592	\$ 866,801	\$ 866,801			93%	93%
M&E Studies		\$ 87,524	\$ 87,524	\$ 16,482	\$ 16,482			19%	19%
Regulatory Compliance		\$ 344,924	\$ 344,924	\$ 299,475	\$ 299,475			87%	87%
General Administration		\$ 5,645,874	\$ 5,645,874	\$ 3,515,772	\$ 3,515,772			62%	62%
CPUC Energy Division		\$ 85,774	\$ 85,774	\$ 19,120	\$ 19,120			22%	22%
TOTAL PROGRAM COSTS		\$ 62,571,908	\$ 62,571,908	\$ 49,101,879	\$ 49,101,879			78%	78%
Funded Outside of LIEE Program Budget									
Indirect Costs				\$ 2,514,177	\$ 2,514,177				
NGAT Costs				\$ -	\$ 1,915,396	\$ 1,915,396			

¹ 2009 expenditures include billing credits from program leveraging in the amount of \$148,050 from SCE for In Home Energy Education services in PY2007 in the SCE/SoCalGas overlap area.

Bar Chart 1- Total Spent versus Authorized by Category

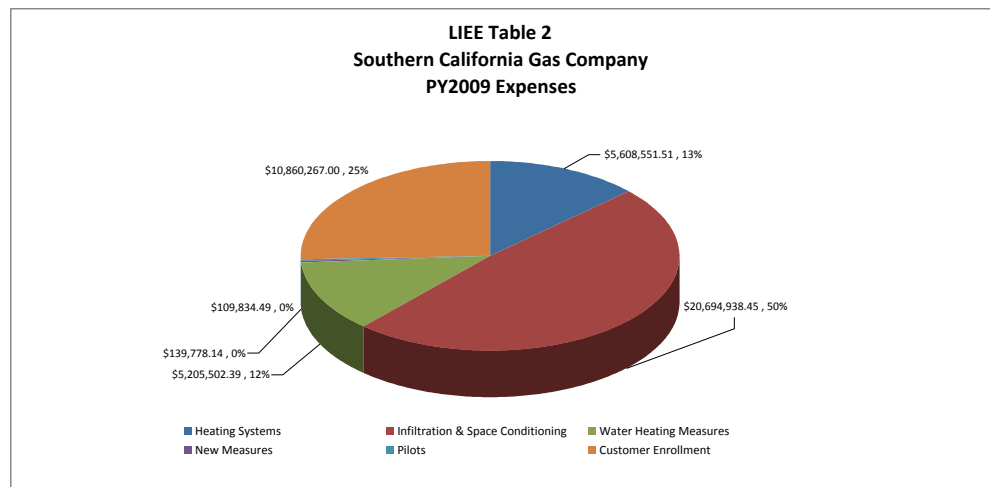


PY2009 Low Income Energy Efficiency Annual Report
LIEE Table 2
LIEE Expenses and Energy Savings by Measures Installed
SOUTHERN CALIFORNIA GAS COMPANY

Measures[1]	Units	PY Completed & Expensed Installations					
		Quantity Installed	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses	% of Expenditure
Heating Systems							
Furnaces	Each	6,385			16,010	\$ 5,608,552	13%
Cooling Measures							
A/C Replacement - Room	Each						
A/C Replacement - Centra	Each						
A/C Tune-up - Centra	Each						
A/C Services - Centra	Each						
Heat Pump	Each						
Evaporative Coolers	Each						
Evaporative Cooler Maintenance	Each						
Infiltration & Space Conditioning							
Envelope and Air Sealing Measures	Home	67,829			381,506	\$ 15,308,806	36%
Duct Sealing	Home	2,575			56,218	\$ 1,701,808	4%
Attic Insulation	Home	4,734			195,067	\$ 3,684,324	9%
Water Heating Measures							
Water Heater Conservation Measures	Home	71,634			932,136	\$ 4,609,522	11%
Water Heater Replacement - Gas	Each	615			7,442	\$ 595,980	1%
Water Heater Replacement - Electric	Each						
Tankless Water Heater - Gas	Each						
Tankless Water Heater - Electric	Each						
Lighting Measures							
CFLs	Each						
Interior Hard wired CFL fixture	Each						
Exterior Hard wired CFL fixtures	Each						
Torchiere	Each						
Refrigerators							
Refrigerators - Primary	Each						
Refrigerators - Secondary	Each						
Pool Pumps							
Pool Pumps	Each						
New Measures							
Forced Air Unit Standing Pilot Change Ou	Each						
Furnace Clean and Tune	Each	2,276			6,435	\$ 139,778	0%
High Efficiency Clothes Washer	Each						
Microwave	Each						
Thermostatic Shower Valve	Each						
LED Night Lights	Each						
Occupancy Sensor	Each						
Pilots							
A/C Tune-up Centra	Home						
Interior Hard wired CFL fixture	Each						
Ceiling Fans	Each						
In-Home Display	Each						
Programmable Controllable Thermosta	Each						
Forced Air Unit	Each	41			3,608	\$ 109,834	0%
Microwave	Each						
High Efficiency Clothes Washer	Each						
Customer Enrollment							
Outreach & Assessment	Home	85,147				\$ 9,712,062	23%
In-Home Education	Home	76,988				\$ 1,148,205	3%
Education Workshops	Participant						
Total Savings							
						\$ 42,618,872	100%
Homes Weatherized							
Homes Weatherized	Home	71,595					
Homes Treated							
- Single Family Homes Treated	Home	56,440					
- Multi-Family Homes Treated	Home	19,817					
- Mobile Homes Treated	Home	8,890					
- Total Number of Homes Treated	Home	85,147					
# Eligible Homes to be Treated for PY[2]	Home	110,864					
% OF Homes Treated	%	77%					
- Total Master-Metered Homes Treated	Home	11,525					

[1] Includes measures that were inadvertently omitted from 2009-2011 Application, see Section 1.2 of this report
[2] Based on Attachment H of D. 08-11-031
* Quantity installed represents number of household

PIE CHART 1- Expenses by Measures Category



PY2009 Low Income Energy Efficiency Annual Report
LIEE Table 3
LIEE COST-EFFECTIVENESS
SOUTHERN CALIFORNIA GAS COMPANY

PY - Recorded ¹						
	Ratio of Benefits Over Costs			Net Benefits; \$ Millions		
Program Year	Utility Cost Test	Total Resource Cost Test	Modified Participant Test	Utility Cost Test	Total Resource Cost Test	Modified Participant Test
2009	0.31	0.21	0.67	(33,134,007)	(37,833,117)	(16,208,219)
2008	0.28	0.20	0.71	(26,904,944)	(30,069,392)	(10,909,048)
2007	0.28	0.20	0.68	(20,985,301)	(23,315,525)	(9,541,175)
2006	0.23	0.20	0.90	(21,852,544)	(21,456,113)	(2,798,151)
2005	0.20	0.24	0.54	(23,160,759)	(22,005,772)	(13,294,877)
2004	0.20	0.19	0.53	(26,138,097)	(26,305,744)	(15,353,305)
2003	0.29	0.30	0.63	(24,125,171)	(23,844,044)	(12,519,637)
2002	0.41	0.63	0.83	(7,298,174)	(4,597,814)	(2,053,787)

The Modified Participant Test (MPT) and the Utility Cost Test (UCT) include non-energy benefits (NEBs) along with energy savings in the numerator. The MPT was calculated using the Low Income Public Purpose Test (LIPPT) workbook as modified for the PY2003 LIEE measure cost effectiveness testing (the NEBs model). The UCT was calculated in two stages: first, the NEBs for this ratio were calculated using the NEBs model; second, the avoided cost benefits were calculated using the E3 model for energy efficiency cost effectiveness testing. The Total Resource Test (TRC) was calculated using the E3 calculator. The TRC does not include NEBs.

PY2009 Low Income Energy Efficiency Annual Report
LIEE Table 4
LIEE PENETRATION
SOUTHERN CALIFORNIA GAS COMPANY

Customer	Housing Type	# Homes Treated	Current Year Penetration Rate for Homes Treated
Gas and Electric Customers			
Owners - Total			
	Single Family		
	Multi Family		
	Mobile Homes		
Renters - Total			
	Single Family		
	Multi Family		
	Mobile Homes		
Electric Customers (only)			
Owners - Total			
	Single Family		
	Multi Family		
	Mobile Homes		
Renters - Total			
	Single Family		
	Multi Family		
	Mobile Homes		
Gas Customers (only)			
Owners - Total		47,789	
	Single Family	39,111	
	Multi Family	378	
	Mobile Homes	8,300	
Renters - Total		37,358	
	Single Family	17,329	
	Multi Family	19,439	
	Mobile Homes	590	
Total Homes Treated in PY		85,147	
Total Homes Eligible in PY¹		110,864	77%

¹ Based on Attachment H of D. 08-11-031

Penetration History				
Year ²	Homes Treated	Ineligible & Unwilling ³	Estimated Eligible in Current Year	Current Year Penetration Rate for Homes Treated
2002	49,464			
2003	57,179			
2004	54,677			
2005	40,523			
2006	36,870			
2007	44,176			
2008	58,800			
2009	85,147	3,562	110,864	77%
2010				
2011				
2012				
2013				
2014				
2015				
2016				
2017				
2018				
2019				
2020				
Total Homes Treated since 2002	426,836			

² Homes treated since 2002 are reported to track progress toward meeting the 2020 Programmatic Initiative

³ Define Ineligible & Unwilling

Ineligible - Customers who can not participate in the program due to lack of cooperation from the owner/landlord, or customers who do not meet the program guidelines.

Unwilling - Customers that received information on the program and informed the outreach specialist that they are not interested in the program.

Year	Utility in Shared Service Territory	Eligible Households in Shared Service Territory	Eligible households treated by both utilities in shared service territory
2009	PG&E	93,848	1,175
2009	SCE	1,149,518	25,732
2009	SDG&E	14,818	9

PY2009 Low Income Energy Efficiency Annual Report
LIEE Table 5
LIEE Direct Purchases & Installation Contractors
SOUTHERN CALIFORNIA GAS COMPANY

Contractor	County ¹	Contractor Type (Check one or more if applicable)				PY Annual ¹ Expenditures	VENDOR NAME	SAP VENDOR NUMBER
		Private	CBO	WMDVBE	LIHEAP			
- Contractor A	LA, Ke		x			\$ 702,175	ASSERT INC	53014
- Contractor B	LA		x			\$ 3,737,962	AVALON CARVER COMMUNITY CENTER INC	53030
- Contractor C	LA	x				\$ 66,355	B&W FURNACE SERVICE	25725
- Contractor D	R, I		x	x	x	\$ 646,578	CAMPESINOS UNIDOS INC	53031
- Contractor E	Sba		x		x	\$ 356,391	COMMUNITY ACTION COMMISSION (SANTA BARBARA COUNTY)	42644
- Contractor F	Sbe		x	x	x	\$ 2,420,416	COMMUNITY ACTION PARTNERSHIP (OF SAN BERNADINO COUNTY)	87763
- Contractor G	OC		x	x	x	\$ 619,088	COMMUNITY ACTION PARTNERSHIP OF O C	87830
- Contractor H	R		x		x	\$ 68,618	COMMUNITY ACTION PARTNERSHIP OF RIVERSIDE	92636
- Contractor I	LA		x		x	\$ 94,087	COMMUNITY ENHANCEMENT SERVICES	99419
- Contractor J	LA	x				\$ 136,789	DOMINION REL ESTATE CORP	98291
- Contractor K	LA, R, T, Ki	x				\$ 4,437,087	EAGLE SYSTEMS INTERNATIONAL INC	98587
- Contractor L	LA, R, OC		x	x		\$ 7,257,650	EAST LOS ANGELES COMMUNITY UNION	53026
- Contractor M	LA		x			\$ 614,373	EAST SAN GABRIEL VALLEY CONSORTIUM	53028
- Contractor N	LA, Ke	x				\$ 310,982	ECONO WEST INC	95591
- Contractor O	SLO		x	x	x	\$ 381,164	ECONOMIC OPPORTUNITY COMMISSION OF (SAN LUIS OBISPO COUNTY)	44700
- Contractor P	LA, R, Sbe	x				\$ 506,864	ENVIRONMENTAL ASSESSMENT SERVICES	96668
- Contractor Q	LA		x			\$ 54,386	LONG BEACH COMMUNITY	96945
- Contractor R	LA		x	x	x	\$ 6,203,643	MARAVILLA FOUNDATION	56350
- Contractor S	Ke	x				\$ 147,207	OASIS AIR CONDITIONING	53016
- Contractor T	ALL		x	x	x	\$ 609,125	PACIFIC ASIAN CONSORTIUM IN	37040
- Contractor U	T		x			\$ 402,903	PROTEUS INC	62766
- Contractor V	LA	x				\$ 1,503,728	QUALITY CONSERVATION SERVICES INC	98365
- Contractor W	LA	x		x		\$ 1,294,710	RELIABLE ENERGY MANAGEMENT INC	26042
- Contractor X	ALL	x		x		\$ 1,082,592	RICHARD HEATH & ASSOCIATES INC	8459
- Contractor Y	LA	x				\$ 3,375,998	SIERRA WEATHERIZATION COMPANY INC	99484
- Contractor Z	R, Sbe	x				\$ 259,248	SOCO AIR CONDITIONING CO	25860
- Contractor AA	R	x		x		\$ 78,147	TRI-STATE HOME IMPROVEMENTS INC	93791
- Contractor AB	V, LA		x		x	\$ 20,695	VENTURA COUNTY COMMISSION	28524
- Contractor AC	LA		x	x		\$ 1,796,744	VETERANS IN COMMUNITY SERVICES INC	53027
- Contractor AD	LA	x				\$ 128,629	VO VI FRIENDSHIP ASSOCIATION	95660
- Contractor AE	LA		x			\$ 154,116	WATTS LABOR COMMUNITY ACTION COMM	53024
- Contractor AF	LA, R, Sbe	x				\$ 1,646,146	WESTERN INSULATION LP	98673
- Contractor AG	R, LA	x				\$ 167,364	WG MECHANICAL	94334
- Contractor AH	LA, OC, V, Sbe, R, I, T, Ke, Ki, F, SLO	x		x		\$ 2,381,274	WINEGARD ENERGY	27228
- Contractor AI	Ke	x		x		\$ 17,421	GARCIA & SONS HOME IMPROVEMENT	99621
- Contractor AJ	T, Ki, F	x				\$ 18,950	STAPLES & ASSOC	97587
- Contractor AK	T, Ki, F	x		x		\$ 429,261	HIGHLANDS ENERGY SERVICES INC	101799
- Contractor AL	R, I	x		x		\$ 14,038	AMERICAN INSULATION INC	99517
- Contractor AM	V, LA		x		x	\$ 89,203	COMMUNITY ACTION OF VENTURA COUNTY	101214
Total Contractor Expenditures						\$ 44,232,107		

Key	
Los Angeles	LA
Orange County	OC
Ventura	V
San Bernadino	Sbe
Riverside	R
Imperial	I
Tulare	T
Kings	Ki
Kern	Ke
Santa Barbara	Sba
San Luis Obispo	SLO
Fresno	F

¹The total annual expenditures reflected on this table include payments to the LIEE Inspections Contractors.

PY2009 Low Income Energy Efficiency Annual Report
LIEE Table 7
LIEE Direct Purchases & Installation Contractors
SOUTHERN CALIFORNIA GAS COMPANY

2009 Expenditures Recorded by Cost Element				
LIEE Program:	Labor ¹	Non-Labor ²	Contract ³	Total
Energy Efficiency				
- Gas Appliances	\$ -	\$ 97	\$ 6,204,434	\$ 6,204,532
- Electric Appliances	\$ -	\$ -	\$ -	\$ -
- Weatherization	\$ -	\$ -	\$ 25,444,239	\$ 25,444,239
- Outreach and Assessment	\$ -	\$ -	\$ 9,712,062	\$ 9,712,062
- In Home Energy Education	\$ -	\$ -	\$ 1,148,205	\$ 1,148,205
- Education Workshops	\$ -	\$ -	\$ -	\$ -
- Pilot	\$ -	\$ -	\$ 109,834	\$ 109,834
Energy Efficiency TOTAL	\$ -	\$ 97	\$ 42,618,775	\$ 42,618,872
Training Center	\$ 214,557	\$ 85,517	\$ -	\$ 300,074
Inspections	\$ -	\$ -	\$ 1,613,332	\$ 1,613,332
Marketing	\$ -	\$ 866,801	\$ -	\$ 866,801
M&E Studies	\$ -	\$ 16,482	\$ -	\$ 16,482
Regulatory Compliance	\$ 289,043	\$ 10,432	\$ -	\$ 299,475
General Administration	\$ 2,625,563	\$ 890,209	\$ -	\$ 3,515,772
CPUC Energy Division	\$ -	\$ 19,120	\$ -	\$ 19,120
TOTAL PROGRAM COSTS	\$ 3,129,164	\$ 1,888,658	\$ 44,232,107	\$ 49,249,929

¹Define Labor

²Define Non-Labor

³Define Contractor

Utility staff labor including labor indirects (vacation and sick leave, payroll taxes, and affiliate labor indirects)

All other non-labor costs excluding contractor costs defined below.

Expenses associated with contractor installations, Weatherization, Inspections, Outreach and Assessment, and In Home Energy Education services.

PY2009 Low Income Energy Efficiency Annual Report
LIEE Table 8
Detail by Housing Type and Source
SOUTHERN CALIFORNIA GAS COMPANY

Customer	Housing Type	2009 Energy Savings			2009 Expenses ¹	2009 Households Treated	2009 Households Eligible
		(mWh)	MW	(mTherm*)			
Gas and Electric Customers							
Owners - Total							
	Single Family						
	Multi Family						
	Mobile Homes						
Renters - Total							
	Single Family						
	Multi Family						
	Mobile Homes						
Electric Customers (only)							
Owners - Total							
	Single Family						
	Multi Family						
	Mobile Homes						
Renters - Total							
	Single Family						
	Multi Family						
	Mobile Homes						
Gas Customers (only)							
Owners - Total				1,076	\$ 23,836,872	47,789	
	Single Family			918	\$ 19,508,336	39,111	
	Multi Family			2	\$ 188,544	378	
	Mobile Homes			156	\$ 4,139,991	8,300	
Renters - Total				523	\$ 18,633,950	37,358	
	Single Family			372	\$ 8,643,603	17,329	
	Multi Family			141	\$ 9,696,059	19,439	
	Mobile Homes			10	\$ 294,289	590	
Total Homes Treated in PY						85,147	
Total Homes Eligible in PY²						110,864	77%

* Thousands of Therms

¹ Excluding indirect program costs

² Based on Attachment H of D. 08-11-031

PY2009 Low Income Energy Efficiency Annual Report

LIEE Table 9

Life Cycle Bill Savings by Measure

SOUTHERN CALIFORNIA GAS COMPANY

Measure Description	PY Number Installed	Per Measure Electric Impact - Average (kWh)	Average Per Measure Gas Impact (Therms)	Effective Useful Life (EUL)	2009 Total Measure Life Cycle Bill Savings
Heating Systems					
Furnaces	6,093		2	14	\$ 177,713
Cooling Measures					
A/C Replacement - Room					
A/C Replacement - Central					
A/C Tune-up - Central					
A/C Services - Central					
Heat Pump					
Evaporative Coolers					
Evaporative Cooler Maintenance					
Infiltration & Space Conditioning					
Envelope and Air Sealing Measures	67,829		6	10	\$ 3,303,515
Duct Sealing	2,575		22	25	\$ 888,516
Attic Insulation	4,734		33	25	\$ 3,083,030
Water Heating Measures					
Water Heater Conservation Measures	71,634		11	7	\$ 6,048,483
Water Heater Replacement - Gas	615		12	6	\$ 42,356
Water Heater Replacement - Electric					
Tankless Water Heater - Gas					
Tankless Water Heater - Electric					
Lighting Measures					
CFLs					
Interior Hard wired CFL fixtures					
Exterior Hard wired CFL fixtures					
Torchiere					
Refrigerators					
Refrigerators -Primary					
Refrigerators - Secondary					
Pool Pumps					
Pool Pumps					
New Measures					
Forced Air Unit Standing Pilot Change Out					
Furnace Clean and Tune	2,276		2	14	\$ 71,425
High Efficiency Clothes Washer					
Microwave	Each				
Thermostatic Shower Valve	Each				
LED Night Lights	Each				
Occupancy Sensor					
Pilots					
A/C Tune-up Central	Home				
Interior Hard wired CFL fixtures	Each				
Ceiling Fans	Each				
In-Home Display	Each				
Programmable Controllable Thermostat	Each				
Forced Air Unit	41		88	14	\$ 36,197
Microwave					
High Efficiency Clothes Washer					
Total Homes Served By the Program					85,147
Life Cycle Bill Savings Per Home					\$ 160

* Number installed represents number of households

PY2009 Low Income Energy Efficiency Annual Report
LIEE Table 10
Energy Rate Used for Bill Savings Calculations
SOUTHERN CALIFORNIA GAS COMPANY

Year	\$/kWh [1]	\$/Therm
2009		1.0680
2010		1.1000
2011		1.1330
2012		1.1670
2013		1.2020
2014		1.2381
2015		1.2752
2016		1.3135
2017		1.3529
2018		1.3935
2019		1.4353
2020		1.4784
2021		1.5227
2022		1.5684
2023		1.6154
2024		1.6639
2025		1.7138
2026		1.7652
2027		1.8182
2028		1.8727
2029		1.9289
2030		1.9868
2031		2.0464
2032		2.1078
2033		2.1710

[1] The 2009 average cost per kWh paid by participants. Cost is escalated 3% annually in 24 subsequent years

PY2009 Low Income Energy Efficiency Annual Report
LIEE Table 11
Bill Savings Calculations by Program Year
SOUTHERN CALIFORNIA GAS COMPANY

Program Year	Program Costs	Program Lifecycle Bill Savings	Program Bill Savings/ Cost Ratio	Per Home Average Lifecycle Bill Savings
2007	\$ 27,097,166	\$ 7,062,428	0.26	\$ 160
2008	\$ 35,067,739	\$ 9,894,347	0.28	\$ 168
2009 ^[1]	\$ 62,571,908	\$ 13,651,236	0.39	\$ 160

^[1] Activity reported for the past 3 years

PY2009 Low Income Energy Efficiency Annual Report

LIEE Table 12

Whole Neighborhood Approach

SOUTHERN CALIFORNIA GAS COMPANY

A	B	C	D	E	F=(D+E)/C
Neighborhood (County, Zipcode, Zip+7 etc.)	Total Residential Customers	Total Estimated Eligible	Total Treated 2002-2008	Total Treated This Year	Penetration Rate
Neighborhood in zip code 92801 - Community Action Partnership Orange County	1811	1084	89	8	9%
Neighborhood in zip code 90744 - Reliable Energy/Avalon-Carver	6994	3008	259	550	27%
Neighborhood in zip code 90631 - The East Los Angeles Community Union	1234	878	52	118	19%
Neighborhood in zip code 90631-47 - The East Los Angeles Community Union	465	215	14	56	33%
Neighborhood in zip code 90631-48 - The East Los Angeles Community Union	253	107	71	17	82%
Neighborhood in zip code 91010-25 - The East Los Angeles Community Union	478	190	17	3	11%
Neighborhood in zip code 90631-61 - The East Los Angeles Community Union	198	86	31	11	49%
Neighborhood in zip code 90631-68 - The East Los Angeles Community Union	252	117	41	22	54%
Neighborhood in zip code 91016-31 - Reliable Energy/LA Works	398	142	25	4	20%
Neighborhood in zip code 91016-41 - Reliable Energy/LA Works	368	185	84	8	50%
Neighborhood in zip code 90022-12 - The East Los Angeles Community Union	467	305	215	37	83%
Neighborhood in zip code 90631-64 - The East Los Angeles Community Union	272	99	TBD*	10	N/A
Neighborhood in zip code 92507-33 - The East Los Angeles Community Union	153	111	57	5	56%
Neighborhood in zip code 92507-41 - The East Los Angeles Community Union	229	154	69	7	49%
Neighborhood in zip code 92507-42 - The East Los Angeles Community Union	142	97	24	6	31%
Neighborhood in zip code 92507-49 - The East Los Angeles Community Union	182	138	38	5	31%
Neighborhood in zip code 92507-50 - The East Los Angeles Community Union	224	164	64	14	48%
Neighborhood in zip code 92507-51 - The East Los Angeles Community Union	282	153	115	13	83%
Neighborhood in zip code 92507-52 - The East Los Angeles Community Union	314	169	104	28	78%
Neighborhood in zip code 92507-56 - The East Los Angeles Community Union	325	191	89	19	57%
Neighborhood in zip code 93033-15 - Community Action of Ventura County	334	132	19	3	17%
Neighborhood in zip code 93033-16 - Community Action of Ventura County	231	118	5	0	4%
Neighborhood in zip code 93033-31 - Community Action of Ventura County	292	148	25	3	19%
Neighborhood in zip code 93033-32 - Community Action of Ventura County	314	161	9	0	6%
Neighborhood in zip code 93033-43 - Community Action of Ventura County	206	73	9	1	14%
Neighborhood in zip code 93033-44 - Community Action of Ventura County	340	190	7	0	4%

A	B	C	D	E	F=(D+E)/C
Neighborhood (County, Zipcode, Zip+7 etc.)	Total Residential Customers	Total Estimated Eligible	Total Treated 2002-2008	Total Treated This Year	Penetration Rate
Neighborhood in zip code 90715-11 - Veterans in Community Service	278	49	5	4	18%
Neighborhood in zip code 90715-12 - Veterans in Community Service	378	109	33	8	38%
Neighborhood in zip code 90715-13 - Veterans in Community Service	627	275	141	26	61%
Neighborhood in zip code 92543-20 - Synergy Companies	127	64	4	0	6%
Neighborhood in zip code 92543-37 - Synergy Companies	322	175	91	8	57%
Neighborhood in zip code 92544-19 - Synergy Companies	409	162	58	54	69%
Neighborhood in zip code 92544-40 - Synergy Companies	227	85	40	9	58%
Neighborhood in zip code 92545-34 - Synergy Companies	262	131	27	11	29%
Neighborhood in zip code 90262-15 - Maravilla Foundation	203	128	96	5	79%
Neighborhood in zip code 90262-16 - Maravilla Foundation	321	172	128	32	93%
Neighborhood in zip code 93219-93 - Reliable Energy	148	103	14	15	28%
Neighborhood in zip code 93219-96 - Reliable Energy	125	94	12	0	13%
Neighborhood in zip code 93219-97 - Reliable Energy	290	214	118	23	66%
Neighborhood in zip code 93215-10 - Reliable Energy	364	251	20	4	10%
Neighborhood in zip code 93215-11 - Reliable Energy	512	329	105	8	34%
Neighborhood in zip code 91405-31 - Assert	564	345	59	3	18%
Neighborhood in zip code 91405-40 - Assert	323	162	28	12	25%
Neighborhood in zip code 92408-29 - Community Action Partnership - San Bernardino	271	149	33	6	26%
Neighborhood in zip code 92408-30 - Community Action Partnership - San Bernardino	308	148	36	2	26%
Neighborhood in zip code 93280-17 - Reliable Energy	175	108	30	1	29%
Neighborhood in zip code 93280-18 - Reliable Energy	138	83	68	5	88%
Neighborhood in zip code 93280-19 - Reliable Energy	233	170	79	3	48%
Neighborhood in zip code 93280-20 - Reliable Energy	236	171	2	13	9%
Neighborhood in zip code 93280-22 - Reliable Energy	242	138	41	7	35%
Neighborhood in zip code 93280-23 - Reliable Energy	239	177	61	6	38%
Neighborhood in zip code 93280-25 - Reliable Energy	496	279	125	17	51%
Neighborhood in zip code 93280-26 - Reliable Energy	298	216	98	6	48%
Neighborhood in zip code 93280-27 - Reliable Energy	318	223	98	58	70%
Neighborhood in zip code 92570-19 - Synergy	317	178	58	14	40%

A	B	C	D	E	F=(D+E)/C
Neighborhood (County, Zipcode, Zip+7 etc.)	Total Residential Customers	Total Estimated Eligible	Total Treated 2002-2008	Total Treated This Year	Penetration Rate
Neighborhood in zip code 92591-20 - Synergy	227	26	58	41	381%
Neighborhood in zip code 92807-22 - Synergy	360	117	34	33	57%
Neighborhood in zip code 92821-49 - Synergy	88	33	23	5	85%
Neighborhood in zip code 93257-12 - Synergy	364	159	26	4	19%
Neighborhood in zip code 93257-15 - Synergy	396	166	28	8	22%
Neighborhood in zip code 93257-16 - Synergy	271	122	22	2	20%
Neighborhood in zip code 93257-17 - Synergy	285	171	51	5	33%
Neighborhood in zip code 93257-19 - Synergy	254	159	20	5	16%
Neighborhood in zip code 93257-20 - Synergy	309	136	21	6	20%
Neighborhood in zip code 93257-22 - Synergy	201	123	15	1	13%
Neighborhood in zip code 93257-23 - Synergy	134	113	26	11	33%
Neighborhood in zip code 93257-24 - Synergy	244	193	65	16	42%
Neighborhood in zip code 93257-27 - Synergy	332	199	30	4	17%
Neighborhood in zip code 93257-28 - Synergy	214	128	30	7	29%
Neighborhood in zip code 93257-29 - Synergy	250	156	19	5	15%
Neighborhood in zip code 93257-30 - Synergy	322	208	47	19	32%
Neighborhood in zip code 93257-31 - Synergy	274	158	26	3	18%
Neighborhood in zip code 93257-32 - Synergy	295	166	24	8	19%
Neighborhood in zip code 93257-33 - Synergy	212	121	34	2	30%
Neighborhood in zip code 93257-34 - Synergy	157	108	11	3	13%
Neighborhood in zip code 93257-35 - Synergy	148	106	18	1	18%
Neighborhood in zip code 93257-38 - Synergy	155	104	2	2	4%
Neighborhood in zip code 93257-39 - Synergy	160	105	21	6	26%
Neighborhood in zip code 93257-40 - Synergy	289	167	31	5	22%
Neighborhood in zip code 93257-41 - Synergy	217	94	21	2	24%
Neighborhood in zip code 93257-42 - Synergy	424	294	66	35	34%
Neighborhood in zip code 93257-43 - Synergy	303	120	27	6	27%
Neighborhood in zip code 93257-44 - Synergy	373	200	58	18	38%
Neighborhood in zip code 93257-45 - Synergy	330	228	60	6	29%
Neighborhood in zip code 93257-46 - Synergy	260	210	50	32	39%
Neighborhood in zip code 93257-47 - Synergy	148	121	13	4	14%

A	B	C	D	E	F=(D+E)/C
Neighborhood (County, Zipcode, Zip+7 etc.)	Total Residential Customers	Total Estimated Eligible	Total Treated 2002-2008	Total Treated This Year	Penetration Rate
Neighborhood in zip code 93257-48 - Synergy	242	200	32	28	30%
Neighborhood in zip code 93257-49 - Synergy	161	110	13	4	16%
Neighborhood in zip code 93257-50 - Synergy	326	227	53	11	28%
Neighborhood in zip code 93257-51 - Synergy	188	135	38	10	36%
Neighborhood in zip code 93257-52 - Synergy	272	185	56	4	33%
Neighborhood in zip code 93257-54 - Synergy	353	273	106	8	42%
Neighborhood in zip code 93257-55 - Synergy	328	216	62	11	34%
Neighborhood in zip code 93257-56 - Synergy	280	188	45	8	28%
Neighborhood in zip code 93257-57 - Synergy	291	188	53	6	31%
Neighborhood in zip code 93257-58 - Synergy	208	106	31	7	36%
Neighborhood in zip code 93257-59 - Synergy	187	109	24	2	24%
Neighborhood in zip code 93257-60 - Synergy	122	71	15	4	27%
Neighborhood in zip code 93257-61 - Synergy	64	32	9	1	31%
Neighborhood in zip code 93257-63 - Synergy	178	101	44	2	45%
Neighborhood in zip code 93257-71 - Synergy	315	157	7	6	8%
Neighborhood in zip code 93257-78 - Synergy	500	302	34	2	12%
Neighborhood in zip code 93292-15 - Synergy	271	64	7	3	16%
Neighborhood in zip code 93292-92 - Synergy	229	85	36	0	42%
Neighborhood in zip code 93292-97 - Synergy	312	158	95	2	61%
Neighborhood in zip code 93274-18 - Synergy	311	180	51	4	31%
Neighborhood in zip code 93274-25 - Synergy	194	78	17	3	26%
Neighborhood in zip code 93274-26 - Synergy	347	151	51	5	37%
Neighborhood in zip code 93274-27 - Synergy	309	185	63	7	38%
Neighborhood in zip code 93274-28 - Synergy	285	118	29	4	28%
Neighborhood in zip code 93274-29 - Synergy	278	113	12	4	14%
Neighborhood in zip code 93274-34 - Synergy	129	78	12	1	17%
Neighborhood in zip code 93274-35 - Synergy	216	142	38	11	34%
Neighborhood in zip code 93274-36 - Synergy	210	139	56	4	43%
Neighborhood in zip code 93274-37 - Synergy	232	158	38	5	27%
Neighborhood in zip code 93274-38 - Synergy	244	205	50	18	33%
Neighborhood in zip code 93274-39 - Synergy	229	192	63	13	40%

A	B	C	D	E	F=(D+E)/C
Neighborhood (County, Zipcode, Zip+7 etc.)	Total Residential Customers	Total Estimated Eligible	Total Treated 2002-2008	Total Treated This Year	Penetration Rate
Neighborhood in zip code 93274-41 - Synergy	110	76	2	0	3%
Neighborhood in zip code 93274-42 - Synergy	111	75	7	0	9%
Neighborhood in zip code 93274-43 - Synergy	282	137	27	2	21%
Neighborhood in zip code 93274-44 - Synergy	229	106	17	4	20%
Neighborhood in zip code 93274-45 - Synergy	204	123	31	0	25%
Neighborhood in zip code 93274-48 - Synergy	322	122	24	19	35%
Neighborhood in zip code 93274-49 - Synergy	300	177	59	14	41%
Neighborhood in zip code 93274-50 - Synergy	185	114	38	0	33%
Neighborhood in zip code 93274-51 - Synergy	284	178	76	3	44%
Neighborhood in zip code 93274-52 - Synergy	260	196	59	3	32%
Neighborhood in zip code 93274-53 - Synergy	118	91	28	1	32%
Neighborhood in zip code 93274-55 - Synergy	159	116	76	1	66%
Neighborhood in zip code 93274-56 - Synergy	235	171	63	3	39%
Neighborhood in zip code 93274-57 - Synergy	312	227	111	1	49%
Neighborhood in zip code 93274-58 - Synergy	329	198	50	5	28%
Neighborhood in zip code 93274-59 - Synergy	343	172	39	5	26%
Neighborhood in zip code 93274-62 - Synergy	386	154	18	4	14%
Neighborhood in zip code 93274-63 - Synergy	234	129	94	5	77%
Neighborhood in zip code 93274-64 - Synergy	17	14	0	0	0%
Neighborhood in zip code 93274-66 - Synergy	244	113	25	1	23%
Neighborhood in zip code 93274-67 - Synergy	348	167	12	1	8%
Neighborhood in zip code 93274-69 - Synergy	246	114	27	3	26%
Neighborhood in zip code 93274-70 - Synergy	233	142	28	2	21%
Neighborhood in zip code 93274-71 - Synergy	117	72	15	0	21%
Neighborhood in zip code 93274-72 - Synergy	252	92	8	3	12%
Neighborhood in zip code 93274-76 - Synergy	467	284	34	10	15%
Neighborhood in zip code 93274-77 - Synergy	84	41	2	0	5%
Neighborhood in zip code 93274-79 - Synergy	132	58	4	2	10%
Neighborhood in zip code 93274-84 - Synergy	281	133	47	1	36%
Neighborhood in zip code 93274-87 - Synergy	314	173	36	3	23%
Neighborhood in zip code 93274-92 - Synergy	200	105	7	0	7%

A	B	C	D	E	F=(D+E)/C
Neighborhood (County, Zipcode, Zip+7 etc.)	Total Residential Customers	Total Estimated Eligible	Total Treated 2002-2008	Total Treated This Year	Penetration Rate
Neighborhood in zip code 93277-15 - Synergy	300	151	11	3	9%
Neighborhood in zip code 93277-16 - Synergy	190	111	25	13	34%
Neighborhood in zip code 93277-17 - Synergy	392	195	144	2	75%
Neighborhood in zip code 93277-18 - Synergy	332	145	24	3	19%
Neighborhood in zip code 93277-19 - Synergy	234	95	34	2	38%
Neighborhood in zip code 93277-26 - Synergy	230	144	50	2	36%
Neighborhood in zip code 93277-27 - Synergy	224	163	45	2	29%
Neighborhood in zip code 93277-28 - Synergy	184	139	50	2	37%
Neighborhood in zip code 93277-34 - Synergy	460	160	13	5	11%
Neighborhood in zip code 93277-44 - Synergy	227	119	73	4	65%
Neighborhood in zip code 93277-45 - Synergy	231	116	24	2	22%
Neighborhood in zip code 93277-46 - Synergy	221	57	8	2	18%
Neighborhood in zip code 93277-47 - Synergy	297	76	16	1	22%
Neighborhood in zip code 93277-48 - Synergy	263	138	48	3	37%
Neighborhood in zip code 93277-49 - Synergy	141	73	23	1	33%
Neighborhood in zip code 93277-72 - Synergy	415	149	37	3	27%
Neighborhood in zip code 93291-17 - Synergy	139	42	34	2	85%
Neighborhood in zip code 93291-18 - Synergy	287	172	113	7	70%
Neighborhood in zip code 93291-19 - Synergy	160	93	49	6	59%
Neighborhood in zip code 93291-20 - Synergy	354	192	143	10	80%
Neighborhood in zip code 93291-21 - Synergy	175	110	57	3	55%
Neighborhood in zip code 93291-24 - Synergy	206	136	59	5	47%
Neighborhood in zip code 93291-25 - Synergy	419	268	153	23	66%
Neighborhood in zip code 93291-26 - Synergy	372	206	79	8	42%
Neighborhood in zip code 93291-27 - Synergy	269	191	138	13	79%
Neighborhood in zip code 93291-28 - Synergy	165	110	45	13	53%
Neighborhood in zip code 93291-29 - Synergy	148	105	33	11	42%
Neighborhood in zip code 93291-30 - Synergy	262	184	75	5	43%
Neighborhood in zip code 93291-31 - Synergy	369	124	13	4	14%
Neighborhood in zip code 93291-32 - Synergy	235	135	65	10	56%
Neighborhood in zip code 93291-33 - Synergy	185	107	54	6	56%

A	B	C	D	E	F=(D+E)/C
Neighborhood (County, Zipcode, Zip+7 etc.)	Total Residential Customers	Total Estimated Eligible	Total Treated 2002-2008	Total Treated This Year	Penetration Rate
Neighborhood in zip code 93291-34 - Synergy	146	86	32	1	38%
Neighborhood in zip code 93291-35 - Synergy	113	81	34	4	47%
Neighborhood in zip code 93291-36 - Synergy	240	167	71	3	44%
Neighborhood in zip code 93291-37 - Synergy	228	155	71	3	48%
Neighborhood in zip code 93291-46 - Synergy	188	114	54	5	52%
Neighborhood in zip code 93291-47 - Synergy	88	46	21	2	50%
Neighborhood in zip code 93291-48 - Synergy	192	111	29	4	30%
Neighborhood in zip code 93291-49 - Synergy	184	134	21	1	16%
Neighborhood in zip code 93291-50 - Synergy	133	98	61	1	63%
Neighborhood in zip code 93291-52 - Synergy	343	70	13	1	20%
Neighborhood in zip code 93291-71 - Synergy	121	37	18	0	48%
Neighborhood in zip code 93291-80 - Synergy	100	0	0	2	N/A
Neighborhood in zip code 93291-88 - Synergy	312	130	37	3	31%
Neighborhood in zip code 93291-89 - Synergy	272	105	9	17	25%
Neighborhood in zip code 93291-97 - Synergy	346	61	0	3	5%
Neighborhood in zip code 92879-23 - The East Los Angeles Community Union	452	207	130	28	76%
Neighborhood in zip code 92879-25 - The East Los Angeles Community Union	287	122	66	15	67%
Neighborhood in zip code 92879-26 - The East Los Angeles Community Union	389	127	68	28	76%
Neighborhood in zip code 92879-30 - The East Los Angeles Community Union	236	99	8	6	14%
Neighborhood in zip code 93280-24 - REMCO	288	161	90	8	61%
Neighborhood in zip code 93280-28 - REMCO	172	81	70	4	91%
Neighborhood in zip code 93280-31 - REMCO	102	57	8	7	26%
Neighborhood in zip code 93280-33 - REMCO	115	54	35	4	72%
Neighborhood in zip code 92240-35 - Synergy	220	136	15	2	12%
Neighborhood in zip code 92241-67 - Synergy	87	44	15	0	34%
Neighborhood in zip code 92563-56 - Synergy	561	251	91	6	39%
Neighborhood in zip code 92563-57 - Synergy	390	175	67	1	39%
Neighborhood in zip code 92563-66 - Synergy	179	80	33	1	42%
Neighborhood in zip code 92563-97 - Synergy	81	36	0	0	0%
Neighborhood in zip code 92595-93 - Synergy	247	72	22	6	39%
Neighborhood in zip code 92595-96 - Synergy	304	78	26	1	35%

A	B	C	D	E	F=(D+E)/C
Neighborhood (County, Zipcode, Zip+7 etc.)	Total Residential Customers	Total Estimated Eligible	Total Treated 2002-2008	Total Treated This Year	Penetration Rate
Neighborhood in zip code 92595-97 - Synergy	246	59	20	0	34%
Neighborhood in zip code 93292-21 - Synergy	272	111	26	4	27%
Neighborhood in zip code 93292-22 - Synergy	273	111	31	12	39%
Neighborhood in zip code 93292-23 - Synergy	394	143	20	5	17%
Neighborhood in zip code 93292-29 - Synergy	359	190	80	4	44%
Neighborhood in zip code 92225-12 - American Insulation	303	81	5	0	6%
Neighborhood in zip code 92225-13 - American Insulation	243	64	1	0	2%
Neighborhood in zip code 92225-14 - American Insulation	278	161	44	0	27%
Neighborhood in zip code 92225-15 - American Insulation	316	183	124	0	68%
Neighborhood in zip code 92225-16 - American Insulation	135	75	3	1	5%
Neighborhood in zip code 92225-17 - American Insulation	202	113	3	0	3%
Neighborhood in zip code 92225-18 - American Insulation	390	185	61	0	33%
Neighborhood in zip code 92225-19 - American Insulation	102	57	5	0	9%
Neighborhood in zip code 92225-20 - American Insulation	34	16	0	0	0%
Neighborhood in zip code 92225-21 - American Insulation	208	97	2	0	2%
Neighborhood in zip code 92225-22 - American Insulation	81	50	6	0	12%
Neighborhood in zip code 92225-23 - American Insulation	203	116	6	0	5%
Neighborhood in zip code 92225-24 - American Insulation	158	95	0	0	0%
Neighborhood in zip code 92225-25 - American Insulation	234	141	3	0	2%
Neighborhood in zip code 92225-26 - American Insulation	77	47	4	0	8%
Neighborhood in zip code 92225-27 - American Insulation	56	34	1	0	3%
Neighborhood in zip code 92225-28 - American Insulation	420	256	88	1	35%
Neighborhood in zip code 92225-87 - American Insulation	8	6	0	0	0%
Neighborhood in zip code 92225-88 - American Insulation	117	89	5	0	6%
Neighborhood in zip code 92225-97 - American Insulation	146	87	2	0	2%
Neighborhood in zip code 92230-21 - American Insulation	24	15	0	0	0%
Neighborhood in zip code 92230-31 - American Insulation	10	6	1	0	16%
Neighborhood in zip code 92230-32 - American Insulation	33	20	1	0	5%
Neighborhood in zip code 92230-38 - American Insulation	43	26	5	0	19%
Neighborhood in zip code 92230-40 - American Insulation	21	13	2	1	23%
Neighborhood in zip code 92230-41 - American Insulation	33	20	7	1	40%

A	B	C	D	E	F=(D+E)/C
Neighborhood (County, Zipcode, Zip+7 etc.)	Total Residential Customers	Total Estimated Eligible	Total Treated 2002-2008	Total Treated This Year	Penetration Rate
Neighborhood in zip code 92230-44 - American Insulation	40	27	7	0	26%
Neighborhood in zip code 92230-51 - American Insulation	22	15	1	0	7%
Neighborhood in zip code 92230-52 - American Insulation	52	35	10	0	28%
Neighborhood in zip code 93505-17 - Assert	80	35	1	3	12%
Neighborhood in zip code 93505-18 - Assert	139	60	10	9	32%
Neighborhood in zip code 93505-26 - Assert	133	50	6	2	16%
Neighborhood in zip code 93309-37 - Garcia & Sons	478	281	8	0	3%
Neighborhood in zip code 93309-38 - Garcia & Sons	306	176	19	0	11%
Neighborhood in zip code 93309-39 - Garcia & Sons	438	255	24	0	9%
Neighborhood in zip code 93309-40 - Garcia & Sons	197	115	20	0	17%
Neighborhood in zip code 93309-46 - Garcia & Sons	359	123	0	0	0%
Neighborhood in zip code 93235-10 - Highland Energy Services	38	23	8	11	82%
Neighborhood in zip code 93235-11 - Highland Energy Services	17	13	3	0	23%
Neighborhood in zip code 93235-12 - Highland Energy Services	200	144	73	5	54%
Neighborhood in zip code 93235-13 - Highland Energy Services	147	112	87	5	82%
Neighborhood in zip code 93235-14 - Highland Energy Services	153	95	40	1	43%
Neighborhood in zip code 93235-15 - Highland Energy Services	320	194	164	4	87%
Neighborhood in zip code 93235-16 - Highland Energy Services	17	11	1	0	9%
Neighborhood in zip code 93235-17 - Highland Energy Services	249	152	60	1	40%
Neighborhood in zip code 93256-94 - Highland Energy Services	93	63	14	7	33%
Neighborhood in zip code 93256-95 - Highland Energy Services	88	58	17	2	33%
Neighborhood in zip code 93256-96 - Highland Energy Services	250	169	35	9	26%
Neighborhood in zip code 93256-97 - Highland Energy Services	296	198	34	18	26%
Neighborhood in zip code 93616-96 - Highland Energy Services	10	7	0	0	0%
Neighborhood in zip code 93616-97 - Highland Energy Services	147	90	9	58	74%
Neighborhood in zip code 93647-20 - Highland Energy Services	337	201	116	2	59%
Neighborhood in zip code 93647-21 - Highland Energy Services	307	176	124	0	70%
Neighborhood in zip code 93647-22 - Highland Energy Services	319	210	145	1	69%
Neighborhood in zip code 93647-23 - Highland Energy Services	88	62	36	0	58%
Neighborhood in zip code 93647-25 - Highland Energy Services	131	77	55	2	74%
Neighborhood in zip code 93647-94 - Highland Energy Services	213	123	22	2	20%

A	B	C	D	E	F=(D+E)/C
Neighborhood (County, Zipcode, Zip+7 etc.)	Total Residential Customers	Total Estimated Eligible	Total Treated 2002-2008	Total Treated This Year	Penetration Rate
Neighborhood in zip code 93647-96 - Highland Energy Services	130	79	30	1	39%
Neighborhood in zip code 93647-97 - Highland Energy Services	141	79	14	2	20%
Neighborhood in zip code 90222-40 - TELACU	267	174	67	20	50%
Neighborhood in zip code 90222-41 - TELACU	71	46	9	49	127%
Neighborhood in zip code 90603-18 - TELACU	434	102	23	16	38%
Neighborhood in zip code 90603-19 - TELACU	412	101	26	33	58%
Neighborhood in zip code 90604-10 - TELACU	398	106	25	3	26%
Neighborhood in zip code 90605-19 - TELACU	92	21	4	3	34%
Neighborhood in zip code 90605-20 - TELACU	225	63	15	1	25%
Neighborhood in zip code 90605-21 - TELACU	187	55	4	2	11%
Neighborhood in zip code 90605-22 - TELACU	348	79	11	5	20%
Neighborhood in zip code 90605-24 - TELACU	317	105	24	1	24%
Neighborhood in zip code 90605-25 - TELACU	359	86	27	7	40%
Neighborhood in zip code 90605-26 - TELACU	384	86	25	1	30%
Neighborhood in zip code 92509-29 - TELACU	152	58	16	1	29%
Neighborhood in zip code 92832-18 - TELACU	80	20	0	70	351%
Neighborhood in zip code 92832-22 - TELACU	241	160	20	131	94%
Neighborhood in zip code 92832-23 - TELACU	335	164	35	260	180%
Neighborhood in zip code 92832-27 - TELACU	308	87	8	236	279%
Neighborhood in zip code 92832-29 - TELACU	432	170	15	1	9%
Neighborhood in zip code 92832-31 - TELACU	346	71	7	1	11%
Neighborhood in zip code 92832-32 - TELACU	332	129	52	0	40%
Neighborhood in zip code 92833-39 - TELACU	329	91	2	1	3%
Neighborhood in zip code 92833-45 - TELACU	252	99	5	0	5%
Neighborhood in zip code 92833-46 - TELACU	384	119	9	1	8%
Neighborhood in zip code 92833-47 - TELACU	297	128	3	4	5%
Neighborhood in zip code 92879-11 - TELACU	889	157	28	0	18%
Neighborhood in zip code 92879-18 - TELACU	425	228	121	15	60%
Neighborhood in zip code 92879-19 - TELACU	315	129	136	18	119%
Neighborhood in zip code 92879-20 - TELACU	180	88	49	9	66%
Neighborhood in zip code 92879-53 - TELACU	382	93	82	1	89%

A	B	C	D	E	F=(D+E)/C
Neighborhood (County, Zipcode, Zip+7 etc.)	Total Residential Customers	Total Estimated Eligible	Total Treated 2002-2008	Total Treated This Year	Penetration Rate
Neighborhood in zip code 92879-85 - TELACU	573	108	9	1	9%
Neighborhood in zip code 93631-10 - Highland Energy Services	362	151	41	0	27%
Neighborhood in zip code 93631-13 - Highland Energy Services	182	74	22	0	30%
Neighborhood in zip code 93631-15 - Highland Energy Services	144	72	9	0	12%
Neighborhood in zip code 93631-16 - Highland Energy Services	191	84	7	0	8%
Neighborhood in zip code 93631-17 - Highland Energy Services	170	72	31	0	43%
Neighborhood in zip code 93631-18 - Highland Energy Services	34	17	1	0	6%
Neighborhood in zip code 93631-19 - Highland Energy Services	65	33	1	0	3%
Neighborhood in zip code 93631-20 - Highland Energy Services	244	123	7	0	6%
Neighborhood in zip code 93631-21 - Highland Energy Services	110	54	15	0	28%
Neighborhood in zip code 93631-22 - Highland Energy Services	105	53	3	0	6%
Neighborhood in zip code 93631-23 - Highland Energy Services	222	95	17	0	18%
Neighborhood in zip code 93631-24 - Highland Energy Services	268	116	11	0	9%
Neighborhood in zip code 93706-87 - Highland Energy Services	5	2	0	0	0%
Neighborhood in zip code 93706-91 - Highland Energy Services	37	18	1	0	6%
Neighborhood in zip code 93706-92 - Highland Energy Services	101	47	3	0	6%
Neighborhood in zip code 93706-96 - Highland Energy Services	17	8	0	0	0%
Neighborhood in zip code 93725-91 - Highland Energy Services	28	12	2	0	17%
Neighborhood in zip code 93725-94 - Highland Energy Services	20	9	0	0	0%
Neighborhood in zip code 93725-95 - Highland Energy Services	24	11	1	0	9%
Neighborhood in zip code 93725-96 - Highland Energy Services	137	61	4	0	7%
Neighborhood in zip code 90222-11 - TELACU	279	164	62	14	46%
Neighborhood in zip code 90222-12 - TELACU	407	297	146	0	49%
Neighborhood in zip code 90222-13 - TELACU	231	166	39	1	24%
Neighborhood in zip code 90222-14 - TELACU	54	35	6	1	20%
Neighborhood in zip code 90222-15 - TELACU	309	219	45	0	21%
Neighborhood in zip code 90222-21 - TELACU	293	217	51	1	24%
Neighborhood in zip code 90222-22 - TELACU	365	256	51	0	20%
Neighborhood in zip code 90222-23 - TELACU	67	44	1	0	2%
Neighborhood in zip code 90222-24 - TELACU	338	197	69	0	35%
Neighborhood in zip code 90222-25 - TELACU	304	190	58	1	31%

A	B	C	D	E	F=(D+E)/C
Neighborhood (County, Zipcode, Zip+7 etc.)	Total Residential Customers	Total Estimated Eligible	Total Treated 2002-2008	Total Treated This Year	Penetration Rate
Neighborhood in zip code 90222-26 - TELACU	204	120	52	2	45%
Neighborhood in zip code 90222-27 - TELACU	180	122	27	1	23%
Neighborhood in zip code 90222-28 - TELACU	75	52	32	0	62%
Neighborhood in zip code 90222-29 - TELACU	214	137	41	2	31%
Neighborhood in zip code 90222-30 - TELACU	253	157	46	2	31%
Neighborhood in zip code 90222-33 - TELACU	148	74	25	0	34%
Neighborhood in zip code 90222-34 - TELACU	265	133	56	1	43%
Neighborhood in zip code 90222-35 - TELACU	467	257	107	1	42%
Neighborhood in zip code 90222-39 - TELACU	353	220	66	1	31%
Neighborhood in zip code 90621-24 - TELACU	353	149	46	0	31%
Neighborhood in zip code 90621-25 - TELACU	312	109	10	0	9%
Neighborhood in zip code 90621-29 - TELACU	134	65	30	0	46%
Neighborhood in zip code 90621-30 - TELACU	317	155	47	0	30%
Neighborhood in zip code 90621-31 - TELACU	485	229	120	0	52%
Neighborhood in zip code 90621-34 - TELACU	246	109	23	0	21%
Neighborhood in zip code 90621-35 - TELACU	368	167	34	0	20%
Neighborhood in zip code 90621-41 - TELACU	84	31	4	0	13%
Neighborhood in zip code 90621-84 - TELACU	86	30	3	0	10%
Neighborhood in zip code 92586-20 - TELACU	86	38	5	0	13%
Neighborhood in zip code 92586-21 - TELACU	149	68	12	0	18%
Neighborhood in zip code 92586-25 - TELACU	293	181	41	0	23%
Neighborhood in zip code 92586-27 - TELACU	398	227	38	0	17%
Neighborhood in zip code 92586-29 - TELACU	349	154	40	0	26%
Neighborhood in zip code 92586-30 - TELACU	151	65	23	0	35%
Neighborhood in zip code 92586-37 - TELACU	300	132	35	0	27%
Neighborhood in zip code 90040-11 - Veterans in Community Service	208	113	99	0	87%
Neighborhood in zip code 90040-23 - Veterans in Community Service	179	85	69	0	81%
Neighborhood in zip code 90002-21 - TELACU	356	236	85	0	36%
Neighborhood in zip code 91701-60 - Synergy	642	207	111	0	54%
Neighborhood in zip code 91709-26 - Synergy	588	119	51	0	43%
Neighborhood in zip code 91761-57 - Synergy	512	179	110	0	61%

A	B	C	D	E	F=(D+E)/C
Neighborhood (County, Zipcode, Zip+7 etc.)	Total Residential Customers	Total Estimated Eligible	Total Treated 2002-2008	Total Treated This Year	Penetration Rate
Neighborhood in zip code 91786-40 - Synergy	296	132	39	0	29%
Neighborhood in zip code 92252-23 - Synergy	98	71	12	0	17%
Neighborhood in zip code 92284-36 - Synergy	192	93	67	0	72%
Neighborhood in zip code 92324-38 - Synergy	227	102	20	0	20%
Neighborhood in zip code 92324-41 - Synergy	481	279	35	0	13%
Neighborhood in zip code 92346-43 - Synergy	390	101	54	0	53%
Neighborhood in zip code 92354-26 - Synergy	244	158	23	0	15%
Neighborhood in zip code 92399-23 - Synergy	226	121	39	0	32%
Neighborhood in zip code 92399-26 - Synergy	326	191	64	0	33%
Neighborhood in zip code 92399-45 - Synergy	516	251	70	0	28%
Neighborhood in zip code 92410-10 - Synergy	576	261	170	0	65%
Neighborhood in zip code 92410-13 - Synergy	251	158	85	0	54%
Neighborhood in zip code 92410-15 - Synergy	94	54	42	0	78%
Neighborhood in zip code 92410-20 - Synergy	526	293	202	0	69%
Neighborhood in zip code 92410-40 - Synergy	344	220	72	0	33%
Neighborhood in zip code 93292-30 - Synergy	123	64	16	0	25%
Neighborhood in zip code 93292-38 - Synergy	235	152	136	0	90%

PY2009 Low Income Energy Efficiency Annual Report
LIEE Table 13
Categorical Enrollment
SOUTHERN CALIFORNIA GAS COMPANY

Type of Enrollment	Number of customers enrolled
Standard Enrollment	34,674
Categorical Eligibility	6,604
Self-Certification	43,869
Other (please list)	-
Total number of customers enrolled	85,147

PY2009 Low Income Energy Efficiency Annual Report
LIEE Table 14
Leveraging
SOUTHERN CALIFORNIA GAS COMPANY

Partner	Relationship outside the IOU[1]?	MOU Present?	Amount of Dollars Saved [2]	Amount of Energy Savings [3]	Other Measureable Benefits [3]	Enrollments Resulting from Leveraging Effort [4]	Meets all Criteria	If not, Explain
Southern California Edison	No	X	\$85,878		12,803 CFLs were installed in 2,714 homes	4,771	No	Electric measures installed by SCE are counted in the SCE 2009 LIEE/CARE Annual Report
Imperial Irrigation District	Yes	X					No	No installations in PY2009
Burbank Water & Power	Yes	[5]					No	No installations in PY2009
LIHEAP	Yes	[6]				491	No	In 2009, LIHEAP measures were not captured.
Grid Alternatives	Yes				Solar Installations	9	No	There are no overlap services between Grid Alternatives and SCG LIEE.
Volunteers of East Los Angeles (VELA)	Yes				Home improvements and minor home repair made by VELA increased customer comfort at their residences	2	No	There are no overlap services between Grid Alternatives and SCG LIEE.

[1] IOUs include Southern California Edison, Pacific Gas & Electric, Southern California Gas Company, and San Diego Gas & Electric.

[2] Dollars saved. Leveraging efforts are measurable and quantifiable in terms of dollars saved by the IOU (Shared/contributed/donated resources, elimination of redundant processes, shared/contributed marketing materials, discounts or reductions in the co

[3] Energy savings/benefits. Leveraging efforts are measurable and quantifiable in terms of home energy benefits/ savings to the eligible households.

[4] Enrollment increases. Leveraging efforts are measurable and quantifiable in terms of program enrollment increases and/or customers served.

[5] An agreement between SoCalGas and Burbank Water & Power was signed first quarter 2010.

[6] An MOU exists between the Commission and the Department of Community Services and Development.

PY2009 Low Income Energy Efficiency Annual Report
LIEE Table 15
Integration
SOUTHERN CALIFORNIA GAS COMPANY

Integration Efforts				
Coordination Type	New Integration Efforts in PY2009	Results		
		Cost and/or Resource Savings		
Interdepartmental, Program Coordination, Data Sharing, ME&O, etc.	[Brief description of effort]	Estimated \$ Savings	Methodology [1]	Other Results
Data Sharing	EE Residential Programs share various customer lists with LIEE for LIEE enrollment.[2]			Low-income customer receives the additional energy and cost savings offered in the LIEE Program.
Data Sharing	EE 3rd Party Multi-family Program shares targeted multi-family site lists with LIEE for LIEE enrollment [2]			Low-income customer receives the additional energy and cost savings offered in the LIEE Program.
Data Sharing	Used CARE enrolled customers for LIEE targeted marketing campaigns which included: Automated Voice Messaging, Direct Mail, Bill Inserts and Email Campaigns			Increased efficiency since customers are already pre-screened for program eligibility
Shared Marketing Materials [3]	Joint purchase of mass media services such as print, radio & TV) campaigns			

[1] Integration efforts are measurable and quantifiable in terms of dollars saved by the IOU (Shared resources, shared marketing materials, shared information technology, shared programmatic infrastructure, among others are just some examples of cost and/

[2] Implementation will begin in 2010.

PY2009 Low Income Energy Efficiency Annual Report

LIEE Table 16

Lighting

This table is not applicable to Southern California Gas Company.

LIEE Program CFL Tracking Table 1 ¹					
<i>Instructions: Please identify the CFL bulbs used within your LIEE program and fill in the remaining columns for each</i>					
Bulb Name / Identification	Bulb Description (wattage, lumens)	Bulb Cost (material)	Admin Cost (overhead, contractor fee, marketing, etc.)	Total Bulb Cost (material + admin)	AB 1109 Compliant? ²

1) Established through Section 9.3.4, D. 08-11-031

2) Compliant in regards to: 1) Do bulbs meet or exceed CEC energy efficiency standards for general purpose lighting? 2) Do all models comply with Europe's RoHS standards on toxicity?

Year	Number of Homes Treated in LIEE Program	Number of Homes Provided CFLs	Avg. # of CFL bulbs given per home	Est. total energy savings from installed CFLs
2009				
2010				
2011				

PY2009 Low Income Energy Efficiency Annual Report
LIEE Table 17
Studies & Pilots Status
SOUTHERN CALIFORNIA GAS COMPANY

	PY Authorized Budget				PY Actual Expenses				% of Budget Spent ¹	% of Project Completed	On Schedule?	Energy Savings Measured ²
	2009	2010	2011	Total	2009 ²	2010	2011	Total				
Studies												
NEB	\$ 30,000	\$ 30,000	\$ 30,000	\$ 90,000	\$ 12,566	\$ -	\$ -	\$ 12,566	14%	10%	N	
2009 Process Evaluation	\$ 20,833	\$ 20,833	\$ 20,834	\$ 62,500	\$ -	\$ -	\$ -	\$ -	0%	0%	N ³	
Load Impact Evaluation ⁴	\$ -	\$ -	\$ 150,000	\$ 150,000	\$ -	\$ -	\$ -	\$ -	0%	25%	Y	
Pilots												
Natural Gas High-Efficiency Forced Air Unit (FAU)	\$ 725,000	\$ -	\$ -	\$ 725,000	\$ 109,834	\$ -	\$ -	\$ 109,834	15%	6%	Y	

¹ Authorized in D.08-11-031, Tables on p.142

²The NEB and Impact Evaluation Studies began in 2009. SDG&E is the lead utility on the NEB Study and paid the invoice(s) for 2009 activity. SoCalGas paid its portion of the invoices paid by SDG&E in 2009 through the affiliate billing order. SCE is the payment administrator for the Impact Evaluation and did not cross-bill the joint utilities for the invoices received for the activities that occurred in 2009. Expenditure percentage is based on the total IOU Study authorized amount in Attachment J of D.08-11-031.

³This study will occur in 2010.

⁴The \$600,000 requested to conduct the Impact Evaluation was denied in the most recent Decision. The IOUs were directed by the Commission to utilize \$600,000 authorized in Decision 06-12-038 for this purpose.

PY2009 Low Income Energy Efficiency Annual Report
LIEE Table 18
"Add Back" Measures
SOUTHERN CALIFORNIA GAS COMPANY

Measure	Climate Zone	Ratio of Benefits Over Costs			Quantity Installed	Budget Impact of "add Back"	Energy Savings Impact (Lifecycle Bill Savings)
		Utility Cost Test	Modified Participant Test	Total Resource Cost Test			
Heating system repair / replace, MF, cz10	10	0.00	0.00	0.00	3	\$ 2,349	\$ -
Heating system repair / replace, MF, cz6	6	0.00	0.00	0.00	2	\$ 1,566	\$ -
Heating system repair / replace, MF, cz8	8	0.00	0.00	0.00	2	\$ 1,566	\$ -
Heating system repair / replace, MF, cz9	9	0.00	0.00	0.00	8	\$ 6,264	\$ -
Heating system repair / replace, MH, cz10	10	0.07	0.10	0.05	267	\$ 235,494	\$ 15,708
Heating system repair / replace, MH, cz13	13	0.08	0.13	0.06	22	\$ 19,404	\$ 1,563
Heating system repair / replace, MH, cz14	14	0.08	0.12	0.06	35	\$ 30,870	\$ 2,292
Heating system repair / replace, MH, cz15	15	0.03	0.05	0.03	24	\$ 21,168	\$ 666
Heating system repair / replace, MH, cz16	16	0.07	0.10	0.05	6	\$ 5,292	\$ 340
Heating system repair / replace, MH, cz6	6	0.05	0.08	0.04	15	\$ 13,230	\$ 633
Heating system repair / replace, MH, cz8	8	0.05	0.07	0.04	115	\$ 101,430	\$ 4,723
Heating system repair / replace, MH, cz9	9	0.05	0.08	0.04	49	\$ 43,218	\$ 2,121
Heating system repair / replace, SF, cz10	10	0.04	0.06	0.03	1,345	\$ 1,186,290	\$ 44,790
Heating system repair / replace, SF, cz13	13	0.05	0.07	0.04	321	\$ 283,122	\$ 12,115
Heating system repair / replace, SF, cz14	14	0.05	0.07	0.03	149	\$ 131,418	\$ 5,458
Heating system repair / replace, SF, cz15	15	0.02	0.03	0.01	44	\$ 38,808	\$ 684
Heating system repair / replace, SF, cz16	16	0.04	0.06	0.03	88	\$ 77,616	\$ 2,735
Heating system repair / replace, SF, cz5	5	0.05	0.07	0.03	1	\$ 882	\$ 37
Heating system repair / replace, SF, cz6	6	0.03	0.04	0.02	133	\$ 117,306	\$ 3,100
Heating system repair / replace, SF, cz8	8	0.03	0.04	0.02	1,643	\$ 1,449,126	\$ 38,299
Heating system repair / replace, SF, cz9	9	0.03	0.04	0.02	1,821	\$ 1,606,122	\$ 42,449

¹ Dollars spent on these Add Back Measures

PY2009 Low Income Energy Efficiency Annual Report
LIEE Table 19
LIEE Fund Shifting
SOUTHERN CALIFORNIA GAS COMPANY

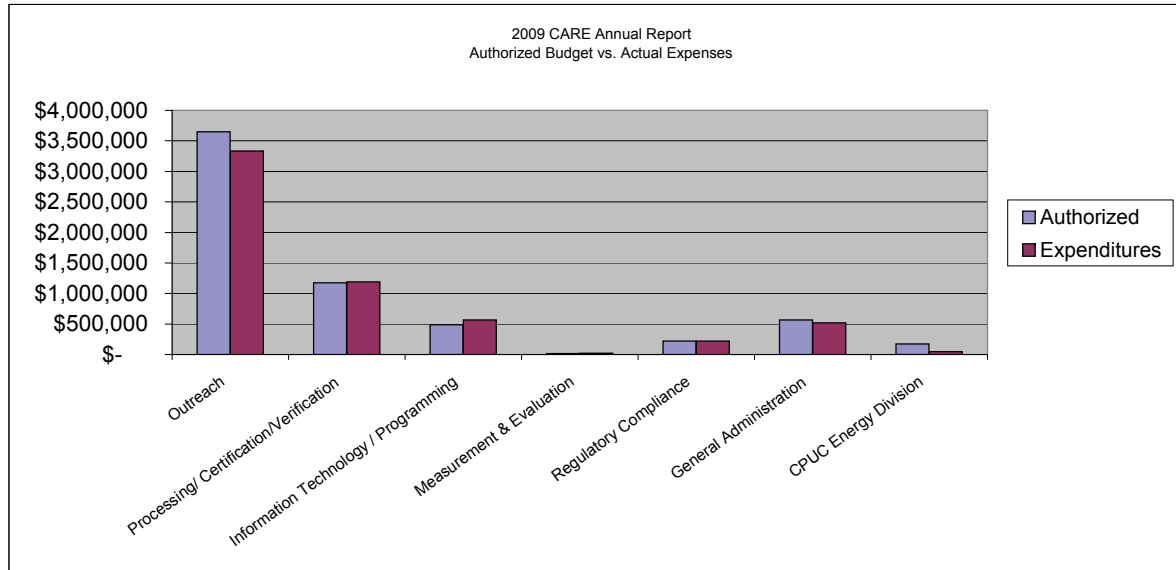
Program Year 2009	Total Authorized	Total Shifted ¹	% of Authorized Total	Carried Forward/Carried Back	To/From Year	To/From Category-Subcategory	Advice Letter Number
LIEE Program:	ex. \$x,xxx.xx	(\$x,xxx)	x%	Carried Forward	From 2008	From In-Home Energy Education	G-xxxx
Energy Efficiency							
- Gas Appliances	\$ 18,519,164	\$ (6,370,783)	10%		To 2009	To Weatherization & Inspections	
- Electric Appliances	\$ -						
- Weatherization	\$ 19,242,434	\$ 6,201,805	10%	N/A	From 2009	From Gas Appliances	
- Outreach and Assessmen	\$ 13,429,131						
- In Home Energy Education	\$ 1,662,960						
- Education Workshops	\$ -						
- Pilot	\$ 868,507						
Energy Efficiency TOTAL	\$ 53,722,196						
Training Center	\$ 307,670						
Inspections	\$ 1,444,354	\$ 168,978	0.0%		From 2009	From Gas Appliances	
Marketing	\$ 933,592						
M&E Studies	\$ 87,524						
Regulatory Compliance	\$ 344,924						
General Administration	\$ 5,645,874						
CPUC Energy Division	\$ 85,774						
TOTAL PROGRAM COSTS	\$ 62,571,908						

1) Numbers are reported in standard accounting format, with negative amounts displayed in parentheses (\$xxx.xx).

2009 CARE Annual Report
CARE Table 1 - Overall Program Expenses
SOUTHERN CALIFORNIA GAS COMPANY

Standardized CARE Administrative Cost Reporting Categories							
2009 Costs by Energy Source							
Category	Residential		Expanded *		Total	Authorized Budget	% Budget Spent
	Electric	Gas	Electric	Gas			
Outreach	\$ -	\$ 3,335,764	\$ -	\$ -	\$ 3,335,764	\$ 3,647,684	91%
Automatic Enrollment	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%
Processing/ Certification/Verification	\$ -	\$ 1,192,617	\$ -	\$ -	\$ 1,192,617	\$ 1,173,027	102%
Information Technology / Programming	\$ -	\$ 567,825	\$ -	\$ -	\$ 567,825	\$ 489,451	116%
Pilots	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%
Measurement & Evaluation	\$ -	\$ 22,954	\$ -	\$ -	\$ 22,954	\$ 16,237	141%
Regulatory Compliance	\$ -	\$ 221,785	\$ -	\$ -	\$ 221,785	\$ 222,130	100%
General Administration	\$ -	\$ 518,709	\$ -	\$ -	\$ 518,709	\$ 566,635	92%
CPUC Energy Division	\$ -	\$ 44,613	\$ -	\$ -	\$ 44,613	\$ 171,500	26%
One E App	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%
TOTAL Program Costs	\$ -	\$ 5,904,267	\$ -	\$ -	\$ 5,904,267	\$ 6,286,664	94%
CARE Rate Discount	\$ -	\$ 93,366,187	\$ -	\$ -	\$ 93,366,187	\$ 129,749,002	72%
Service Establishment Charge Discount	\$ -	\$ 3,924,420	\$ -	\$ -	\$ 3,924,420	\$ 3,097,120	127%
TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	\$ -	\$ 103,194,874	\$ -	\$ -	\$ 103,194,874	\$ 139,132,786	74%

*Due to the relatively small dollar amount, SoCalGas does not record the CARE Expansion Program's cost separately from the regular CARE program cost.



2009 CARE Annual Report
CARE Table 2 - Enrollment, Recertification, Attrition, & Penetration
SOUTHERN CALIFORNIA GAS COMPANY

2009	Gross Enrollment											Enrollment			Total CARE Participants	Estimated CARE Eligible	Penetration Rate % (P/Q)
	Automatic Enrollment						Capitation	Other Sources ⁵	Total (G+H+I)	Recertification ⁶	Total Adjusted (J+K)	Attrition (Drop Offs) ⁷	Net (L-M)	Net Adjusted (N-K)			
	Inter-Utility ¹	Intra-Utility ²	Leveraging ³	One-e-App ⁴	SB580	Combined (B+C+D+E+F)											
January	9,439	1	117	0	0	9,557	71	22,811	32,439	21,538	53,977	26,455	27,522	5,984	1,441,382	1,770,825	81.4%
February	5,364	1,946	55	0	0	7,365	94	13,230	20,689	35,800	56,489	11,261	45,228	9,428	1,450,810	1,770,825	81.9%
March	11,005	1,291	91	0	0	12,387	103	25,326	37,816	53,283	91,099	30,101	60,998	7,715	1,458,525	1,770,825	82.4%
April	12,100	1,266	168	0	0	13,534	85	29,992	43,611	51,496	95,107	20,821	74,286	22,790	1,481,315	1,774,067	83.5%
May	4,631	1,178	249	0	0	6,058	233	17,397	23,688	43,835	67,523	11,776	55,747	11,912	1,493,227	1,774,067	84.2%
June	12,319	2,225	88	0	0	14,632	158	28,088	42,878	66,675	109,553	42,053	67,500	825	1,494,052	1,774,067	84.2%
July	6,891	995	179	0	0	8,065	177	35,138	43,380	50,096	93,476	27,116	66,360	16,264	1,510,316	1,770,947	85.3%
August	10,072	869	119	0	0	11,060	136	26,134	37,330	57,190	94,520	27,402	67,118	9,928	1,520,244	1,770,947	85.8%
September	7,267	837	134	0	0	8,238	151	19,406	27,795	42,142	69,937	16,865	53,072	10,930	1,531,174	1,770,947	86.5%
October	10,147	1,094	61	0	0	11,302	138	16,586	28,026	50,517	78,543	24,818	53,725	3,208	1,534,382	1,772,015	86.6%
November	9,397	1,432	778	0	0	11,607	66	19,325	30,998	49,393	80,391	23,071	57,320	7,927	1,542,309	1,772,015	87.0%
December	12,672	1,332	80	0	0	14,084	97	32,182	46,363	39,497	85,860	28,129	57,731	18,234	1,560,543	1,772,015	88.1%
Total for 2009	111,304	14,466	2,119	0	0	127,889	1,509	285,615	415,013	561,462	976,475	289,868	686,607	125,145			

¹ Enrollments via data sharing between the IOUs.

² Enrollments via data sharing between departments and/or programs within the utility.

³ Enrollments via data sharing with programs outside the IOU that serve low-income customers.

⁴ One-E-App is a pilot program set up by The Center to Promote Healthcare Access (the Center) and PG&E. The pilot will occur within two PG&E counties and looks to implement a strategy of automatic enrollment for low-income customers into the CARE program based on the customers' applications or reapplications for related low-income health and social welfare services. (e.g. MediCAL, Healthy Families, CALKids, etc.) The goal is to develop another means by which low income families can be introduced into the CARE program and, depending on the success of the pilot, possibly expand this pilot to other counties within PG&E's territory as well as to the other IOUs.

⁵ Not including Recertification.

⁶ Recertifications completed regardless of month requested.

⁷ The drop offs include self-declined applications, ineligible applications and closed CARE accounts.

Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

2009 CARE Annual Report
CARE Table 3 - Standard Random Verification Results
SOUTHERN CALIFORNIA GAS COMPANY

2009	Total CARE Population	Participants Requested to Verify	% of Population Total	Participants Dropped (Due to no response)	Participants Dropped (Verified as Ineligible)	Total Dropped	% Dropped through Random Verification	% of Total Population Dropped
January	1,441,382	5,208	0.36%	2,558	159	2,717	52%	0.19%
February	1,450,810	4,742	0.33%	2,460	148	2,608	55%	0.18%
March	1,458,525	4,006	0.27%	2,034	136	2,170	54%	0.15%
April	1,481,315	3,851	0.26%	1,822	173	1,995	52%	0.13%
May	1,493,227	3,944	0.26%	1,877	160	2,037	52%	0.14%
June	1,494,052	4,651	0.31%	2,115	166	2,281	49%	0.15%
July	1,510,316	4,760	0.32%	2,243	163	2,406	51%	0.16%
August	1,520,244	3,560	0.23%	1,822	123	1,945	55%	0.13%
September	1,531,174	3,672	0.24%	2,007	139	2,146	58%	0.14%
October	1,534,382	3,892	0.25%	2,190	135	2,325	60%	0.15%
November	1,542,309	3,598	0.23%	1,825	107	1,932	54%	0.13%
December	1,560,543	4,117	0.26%	1,449	155	1,604	39%	0.10%
Total for 2009	1,560,543	50,001	3.20%	24,402	1,764	26,166	52%	1.79%

SoCalGas' random verification process allows customers 90 days to respond to the verification request. Verification results are tied to the month initiated. Therefore, verification results may be pending due to the time permitted for a participant to respond.

Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

2009 CARE Annual Report
CARE Table 4 - CARE Self-Certification and Self-Recertification Applications¹
SOUTHERN CALIFORNIA GAS COMPANY

	Provided²	Received	Approved³	Denied⁴	Pending/ Never Completed⁵	Duplicates⁶
Total	15,015,556	1,241,869	976,475	40,237	225,157	0
Percentage		100.00%	78.63%	3.24%	18.13%	0.00%

¹ Includes sub-metered customers.

² An estimated number that includes customers whom were provided with CARE self-certification and self-recertification application via direct mail, email, phone, bill insert, door-to-door delivery, utility personnel, and through outreach events.

³ Approved includes customers who are approved through SoCalGas' CARE eligible probability model, data exchange, mail-in, via web, by phone, and through duplicated applications.

⁴ Customers are denied due to not being CARE eligible, not customer of record, or not the customer's primary residence.

⁵ Pending/Never Completed includes closed accounts, incomplete applications, and customers of other utilities who are not SoCalGas customers.

⁶ SoCalGas treats duplicated applications as recertification applications. Duplicates are customers who are already enrolled in CARE and mail in another CARE application.

**2009 CARE Annual Report
CARE Table 5 - Enrollment by County
SOUTHERN CALIFORNIA GAS COMPANY**

County	Estimated Eligible			Total Participants			Penetration Rate		
	Urban	Rural	Total	Urban	Rural	Total	Urban	Rural	Total
Fresno	10,088	705	10,793	10,183	657	10,840	101%	93%	100%
Imperial	263	15,595	15,858	246	13,978	14,224	94%	90%	90%
Kern	8,463	31,844	40,307	9,104	25,514	34,618	108%	80%	86%
Kings	13	14,505	14,518	11	13,083	13,094	83%	90%	90%
Los Angeles	964,092	5,142	969,234	883,668	6,029	889,697	92%	117%	92%
Orange	180,872	0	180,872	140,759	0	140,759	78%	0%	78%
Riverside	177,847	42,302	220,149	155,308	23,661	178,969	87%	56%	81%
San Bernardino	145,799	7,719	153,518	136,529	5,206	141,735	94%	67%	92%
San Luis Obispo	205	25,504	25,709	48	16,319	16,367	23%	64%	64%
Santa Barbara	21,223	13,655	34,878	14,144	13,168	27,312	67%	96%	78%
Tulare	12,716	41,147	53,862	16,194	35,259	51,453	127%	86%	96%
Ventura	45,766	6,551	52,317	35,883	5,592	41,475	78%	85%	79%
Total	1,567,348	204,668	1,772,015	1,402,077	158,466	1,560,543	89%	77%	88.1%

¹ Rural" includes ZIP Codes classified as such by either the Rural Health Council or the Goldsmith modification that was developed to identify small towns and rural areas within large metropolitan counties. ZIP Codes not defined as rural are classified as urban.

Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

2009 CARE Annual Report
CARE Table 6 - Recertification Results
SOUTHERN CALIFORNIA GAS COMPANY

2009	Total CARE Population	Participants Requested to Recertify¹	% of Population Total	Participants Recertified^{2, 3}	Participants Dropped³	Recertification Rate % (E/C)	% of Total Population Dropped (F/B)
January	1,441,382	49,988	3.47%	36,534	13,501	73%	0.94%
February	1,450,810	20,913	1.44%	14,505	7,004	69%	0.48%
March	1,458,525	31,842	2.18%	24,835	9,413	78%	0.65%
April	1,481,315	37,575	2.54%	30,458	11,889	81%	0.80%
May	1,493,227	31,728	2.12%	24,283	9,869	77%	0.66%
June	1,494,052	26,143	1.75%	21,036	8,376	80%	0.56%
July	1,510,316	19,806	1.31%	15,737	6,810	79%	0.45%
August	1,520,244	26,756	1.76%	21,707	9,680	81%	0.64%
September	1,531,174	30,067	1.96%	24,307	10,863	81%	0.71%
October	1,534,382	34,622	2.26%	26,512	12,337	77%	0.80%
November	1,542,309	44,120	2.86%	31,479	15,915	71%	1.03%
December	1,560,543	39,632	2.54%	26,656	11,176	67%	0.72%
Total for 2009	1,560,543	393,192	25.20%	298,049	126,833	76%	8.70%

¹ Participants requested to recertify.

² Participants recertified number does not include the customers who are recertified through SoCalGas' CARE eligible probability model .

³ Recertification results are tied to the month initiated. Therefore, recertification results may be pending due to the time permitted for a participant to

Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

**2009 CARE Annual Report
CARE Table 7 - Capitation Contractors
SOUTHERN CALIFORNIA GAS COMPANY**

Contractor Name ¹	Contractor Type (Check one or more if applicable)				Enrollments		
	Private	CBO	WMDVBE	LIHEAP	Rural	Urban	Total
Community Action Partnership of Orange County		X	X	X	0	85	85
ELA Communications Energy ED Program		X			0	9	9
PACE – Pacific Asian Consortium in Employment		X	X	X	0	0	0
Proteus, Inc.		X			1	109	110
Community Pantry of Hemet		X			0	11	11
Community Action Partnership of San Bernardino		X		X	1	319	320
LA Works		X			0	12	12
Children’s Hospital of Orange County		X			0	10	10
The Companion Line		X			0	501	501
Across Amer Foundation		X			0	8	8
All Peoples Christian Center		X			0	1	1
LA County 211		X			0	34	34
Sr. Citizens Emergency Fund I.V., Inc.		X			0	2	2
Coachella Valley Housing Coalition		X			0	14	14
HABBM		X			0	0	0
Second Harvest Food Bank of Orange County		X			0	0	0
Southeast Community Development Corp.		X			0	37	37
Latino Resource Organization		X			0	0	0
Independent Living Center of Southern California		X			0	0	0
El Concilio del Condado de Ventura		X			0	1	1
Blessed Sacrament Church		X			0	0	0
Starbright Management Services		X			0	0	0
Hermanidad Mexicana		X			0	0	0
CSET		X			3	68	71
Crest Forest Family and Community Service		X			0	0	0
CUI – Campesinos Unidos, Inc.		X	X	X	1	6	7
Veterans in Community Service		X	X	X	0	0	0
MEND		X			0	0	0
Armenian Relief Society		X			0	7	7
Catholic Charities of LA – Brownson House		X			0	4	4
BroadSpectrum		X			0	0	0
OCCC, Inc. (Orange County Community Center)		X			0	3	3
Green Light Shipping	X				0	1	1
APAC Service Center		X			0	261	261
Visalia Emergency Aid Council		X			0	0	0
Total Enrollments and Expenditures					6	1,503	1,509

¹ All capitation contractors with current contracts are listed regardless of whether they have signed up customers or submitted invoices this year.

Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

2009 CARE Annual Report
CARE Table 8 - Participants per Month
SOUTHERN CALIFORNIA GAS COMPANY

2009	Gas and Electric	Gas Only	Electric Only	Total	Eligible Households	Penetration	% Change¹
January	n/a	1,441,382	n/a	1,441,382	1,770,825	81.4%	0.42%
February	n/a	1,450,810	n/a	1,450,810	1,770,825	81.9%	0.65%
March	n/a	1,458,525	n/a	1,458,525	1,770,825	82.4%	0.53%
April	n/a	1,481,315	n/a	1,481,315	1,774,067	83.5%	1.56%
May	n/a	1,493,227	n/a	1,493,227	1,774,067	84.2%	0.80%
June	n/a	1,494,052	n/a	1,494,052	1,774,067	84.2%	0.06%
July	n/a	1,510,316	n/a	1,510,316	1,770,947	85.3%	1.09%
August	n/a	1,520,244	n/a	1,520,244	1,770,947	85.8%	0.66%
September	n/a	1,531,174	n/a	1,531,174	1,770,947	86.5%	0.72%
October	n/a	1,534,382	n/a	1,534,382	1,772,015	86.6%	0.21%
November	n/a	1,542,309	n/a	1,542,309	1,772,015	87.0%	0.52%
December	n/a	1,560,543	n/a	1,560,543	1,772,015	88.1%	1.18%
Total for 2009							

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

Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

2009 CARE Annual Report
CARE Table 9 - Average Monthly Usage & Bill
SOUTHERN CALIFORNIA GAS COMPANY

Average Monthly Gas / Electric Usage			
Residential Non-CARE vs. CARE Customers¹			
	Gas Therms	Gas Therms	
Customer	Tier 1	Tier 2	Total
Non-CARE	28.2	13.6	41.8
CARE	22.7	7.5	30.2
	Electric KWh	Electric KWh	
Customer	Tier 1	Tier 2	Total
Non-CARE	N/A	N/A	N/A
CARE	N/A	N/A	N/A

Average Monthly Gas / Electric Bill		
Residential Non-CARE vs. CARE Customers¹		
(Dollars per Customer)		
Customer	Gas	Electric
Non-CARE	\$36.76	N/A
CARE	\$21.99	N/A

¹ Excludes master-meter usage.

**2009 CARE Annual Report
 CARE Table 10- CARE Surcharge & Revenue
 SOUTHERN CALIFORNIA GAS COMPANY**

Electric					
CARE Surcharge and Revenue Collected by Customer Class					
Customer	Average Monthly		CARE Surcharge as Percent of Bill	Total CARE	Percentage of
	CARE Surcharge	Monthly Bill		Surcharge Revenue	CARE Surcharge
Class	CARE Surcharge	Monthly Bill	as Percent of Bill	Collected	Revenue Collected
Residential*	N/A	N/A	N/A	N/A	N/A
Commercial	N/A	N/A	N/A	N/A	N/A
Agricultural	N/A	N/A	N/A	N/A	N/A
Large/Indust	N/A	N/A	N/A	N/A	N/A

* Excludes CARE customers

GAS					
CARE Surcharge and Revenue Collected by Customer Class					
Customer	Average Monthly		CARE Surcharge as Percent of Bill	Total CARE	Percentage of
	CARE Surcharge	Monthly Bill		Surcharge Revenue	CARE Surcharge
Class	CARE Surcharge	Monthly Bill	as Percent of Bill	Collected	Revenue Collected
Residential	\$1.11	\$36.76	3.02%	\$51,020,174	41.90%
Commercial	\$13.36	\$239.97	5.57%	\$30,294,592	24.88%
Natural Gas Vehicle	\$567.88	\$10,532.98	5.39%	\$2,637,798	2.17%
Industrial	\$164.23	\$678.48	24.21%	\$37,823,828	31.06%

NOTES:

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

2009 CARE Annual Report
CARE Table 11 - CARE Capitation Applications
SOUTHERN CALIFORNIA GAS COMPANY

CARE Capitation Applications					
January 1, 2009 through December 31, 2009					
Entity	Total Received	Approved	Denied	Pending/ Never Completed	Duplicate
Orange County CDC	204	85	6	0	113
ELA Communications	9	9	1	0	0
Proteus	281	110	30	7	130
Cmty Pantry of Hemet	51	11	2	0	38
Cmty Svcs SBDO County	630	320	53	4	253
Childrens Hospital of OC	10	10	0	0	0
Sr Citizen Emergency Fund	3	2	0	1	0
HABBM	1	0	0	0	1
SoEast Comm Dev Corp	67	37	7	0	23
El Concilio-Cdo Ventura	3	1	0	0	2
Blessed Sacrament Church	1	0	0	0	1
Campesinos Unidos, Inc.	27	7	1	0	19
Armenian Relief Society	10	7	0	0	3
Cath Char Bronson House	19	4	2	7	6
CSET	96	71	5	2	18
Orange County Comm Ctr (OCCC)	20	3	0	2	14
Green Light Shipping	1	1	0	0	1
Apac Service Center	338	261	12	0	65
The Companion Line	970	501	75	13	381
Across Amer Foun	26	8	4	1	13
All Peoples Christian	8	1	0	0	7
LA Works	9	12	0	0	8
LA County 211	113	34	17	1	50
Coachella Valley Housing Coalition	0	14	0	0	10
TOTAL	2,897	1,509	215	38	1,156

**2009 CARE Annual Report
 CARE Table 12 - CARE Expansion Program
 SOUTHERN CALIFORNIA GAS COMPANY**

CARE Expansion Program						
2009	Participating Facilities by Month (Gas)			Participating Facilities by Month (Electric)		
	CARE Residential Facilities	CARE Commercial Facilities	Total	CARE Residential Facilities	CARE Commercial Facilities	Total
January	14	1133	1,147	N/A	N/A	N/A
February	14	1143	1,157	N/A	N/A	N/A
March	13	1153	1,166	N/A	N/A	N/A
April	13	1157	1,170	N/A	N/A	N/A
May	13	1161	1,174	N/A	N/A	N/A
June	13	1173	1,186	N/A	N/A	N/A
July	13	1176	1,189	N/A	N/A	N/A
August	13	1179	1,192	N/A	N/A	N/A
September	13	1172	1,185	N/A	N/A	N/A
October	13	1170	1,183	N/A	N/A	N/A
November	13	1176	1,189	N/A	N/A	N/A
December	13	1167	1,180	N/A	N/A	N/A

CARE Expansion Program		
Average Monthly Gas / Electric Usage ¹		
	Gas	Electric
Customer	Therms	KWh
Residential Facilities	30.16	N/A
Commercial Facilities	239.21	N/A

¹ Excludes master meter usage.

CARE Expansion Program					
CARE Expansion Self-Certification and Self-Recertification Applications					
	Received	Approved	Denied	Pending/Never Completed	Duplicates
Total	52	52	0	0	0
Percentage	N/A	100.00%	0.00%	0.00%	0.00%

2009 CARE Annual Report
CARE Table 13 - Fundshifting
SOUTHERN CALIFORNIA GAS COMPANY

CARE Program Fund Shifting by Category 2009				
Program Year: 2009	Total Authorized	Total Shifted¹	% of Authorized Total	Shifted to/from?
CARE Budget Categories:				
Outreach	\$ 3,647,684	\$ (104,681)	-3%	To Processing/Certification/Verification, IT and M&E
Processing, Certification, and Verification	\$ 1,173,027	\$ 19,590	2%	From Outreach
Information Tech./Programming	\$ 489,451	\$ 78,374	16%	From Outreach
Pilots				
Measurement and Evaluation	\$ 16,237	\$ 6,717	41%	From Outreach
Regulatory Compliance	\$ 222,130			
General Administration	\$ 566,635			
CPUC Energy Division Staff	\$ 171,500			
Cooling Centers				
Total Expenses	\$ 6,286,664			
Subsidies and benefits	\$ 132,846,122			
Total Program Costs and Discounts	\$ 139,132,786			

CERTIFICATE OF SERVICE

I hereby certify that a copy of **ANNUAL REPORT ACTIVITY OF SOUTHERN CALIFORNIA GAS COMPANY (U 904 G) ON LOW INCOME ASSISTANCE PROGRAMS FOR 2009** has been electronically mailed to each party of record of the service list in A.08-05-022, A.08-05-024, A.08-05-025, and A.08-05-026. Any party on the service list who has not provided an electronic mail address was served by placing copies in properly addressed and sealed envelopes and by depositing such envelopes in the United States Mail with first-class postage prepaid.

Copies were also sent via Federal Express to the assigned Administrative Law Judges and Commissioner.

Executed this 03rd day of May, 2010 at San Diego, California.

 /s/ Jenny Norin
Jenny Norin