

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

Application of Southern California Edison Company (U 338-E) for Approval of its 2012-2014 California Alternate Rates for Energy and Energy Savings Assistance Programs and Budgets.	Application 11-05-017 (Filed May 16, 2011)
Application of Southern California Gas Company (U904G) for Approval of Low-Income Assistance Programs and Budgets for Program Years 2012-2014.	Application 11-05-018 (Filed May 16, 2011)
Application of Pacific Gas and Electric Company for Approval of the 2012-2014 Energy Savings Assistance and California Alternate Rates for Energy Programs and Budget (U39M).	Application 11-05-019 (Filed May 16, 2011)
Application of San Diego Gas & Electric Company (U902M) for Approval of Low-Income Assistance Programs and Budgets for Program Years 2012-2014.	Application 11-05-020 (Filed May 16, 2011)

**ANNUAL REPORT ACTIVITY OF SOUTHERN CALIFORNIA GAS COMPANY
(U 904 G) ON LOW INCOME ASSISTANCE PROGRAMS FOR 2013**

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**Energy Savings Assistance (ESA) Program
And
California Alternate Rates for Energy (CARE)
Program**

Annual Report

2013 Results

May 1, 2014

ENERGY SAVINGS ASSISTANCE PROGRAM & CARE ANNUAL REPORT

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ENERGY SAVINGS ASSISTANCE PROGRAM ANNUAL REPORT

1. Energy Savings Assistance Program Executive Summary

The California Public Utilities Commission (CPUC) authorized the Southern California Gas Company (SoCalGas) Energy Savings Assistance Program¹ (ESA Program) for program year 2013 (PY2013) in Decision (D.) 12-08-044. This report provides information on SoCalGas' ESA Program accomplishments and expenditures for PY2013, the second year of a three-year program cycle (2012-14).² SoCalGas' ESA Program offers low-income customers weatherization services, energy efficient appliances, and energy education at no cost to qualified natural gas customers within its service territory.

In D.07-12-051, the CPUC updated its policy objectives for the ESA Program stating:

“[T]he key policy objective for 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. Concurrently, 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.”³

To achieve these objectives, the CPUC adopted a programmatic ESA Program initiative

¹ The Energy Savings Assistance Program was formerly known as the Low-Income Energy Efficiency (LIEE) Program.

² SoCalGas notes that certain elements of this annual report have been altered from prior versions to reflect information associated with the 2012 – 2014 program cycle. Such matters were determined in consultation

³ D.07-12-051 at p. 25.

(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.”⁴

The California Energy Efficiency Strategic Plan (Strategic Plan) lays out two goals: 1) By 2020, all eligible customers will be given the opportunity to participate in the ESA Program, and 2) The ESA Program will be an energy resource by delivering increasingly cost-effective and longer-term savings.

In D.12-08-044, the CPUC reinforced its key policy objective of making the ESA Program a reliable energy resource by adopting goals to treat one third of SoCalGas’ willing and eligible households during the 2012-2014 program cycle. SoCalGas continues to work towards meeting the CPUC directed ESA Program goals and objectives. Summary results for PY2013 are provided in Section 1.2 below

1.1. Alignment of Energy Savings Assistance Program with Strategic Plan Goals and Strategy
1.1.1. Please identify the IOU strategies employed in meeting Goal 1: Improve Customer Outreach

Implementation Plan and Timeline		
Strategies	Mid Term 2012 – 2014	IOU strategy employed this program year
1.1: Strengthen program outreach using segmentation analysis and social marketing tools.	<ul style="list-style-type: none"> Implement energy education designed to help customers understand and change behaviors in ways that support ESA Program savings. 	<p>In PY2013, SoCalGas utilized social marketing:</p> <ul style="list-style-type: none"> Deployed 2-3 posts a month that shared information about the CARE and ESA Program on SoCalGas’ Facebook, Twitter, and YouTube websites. SoCalGas utilized a mobile device campaign targeting the Spanish speaking segment⁵ by specifically heading a

⁴ Id.

⁵ This market was targeted due to research identifying it as the fastest growing segment of mobile device users, who also use these devices as a primary means for communication.

Implementation Plan and Timeline

Strategies	Mid Term 2012 – 2014	IOU strategy employed this program year
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		<p>mobile pilot campaign with the following objectives:</p> <ul style="list-style-type: none"> a) Increase ESA Program awareness and enrollment while exploring innovative and new mobile device channels that drive “Hot Leads” (i.e., customers that have stated an interest in the program). b) Target bicultural adults ages 18-29; General Market and Hispanic low income residents in the Los Angeles designated market area. <ul style="list-style-type: none"> • A second campaign focused on educating customers about the ESA Program and the customer’s “contractor team”. Customer trust in third party contractors has been an obstacle to gaining enrollments, and this campaign worked to gain trust in ESA Program Contractors. The campaign used a diverse media mix including, billboards, digital, print, mobile, and social media. Print campaigns were provided in multiple languages. • SoCalGas launched a mobile application for its customers, including a section on “Ways to Save” conservation tips. This application with bill payment tools and “ways to save” is available across customer segments, including but not limited to low-income customers. • The Whole Neighborhood Approach (WNA) continues to be used to identify and reach out to targeted low-income customer segments. In PY2013, WNA was used to share a targeted customer list with contractors, which included self-certification PRIZM code information used to streamline the ESA Program enrollment process.
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Implementation Plan and Timeline		
Strategies	Mid Term 2012 – 2014	IOU strategy employed this program year
		<ul style="list-style-type: none"> • SoCalGas continued to use the ESA Program website page and interest form, which creates another avenue to generate customer driven leads and allows the customers to specify whether they qualify through income and/or categorical eligibility. The web page captures additional customer information in order to better identify potentially eligible customers and accelerate the enrollment process.
<p>1.2: Develop a recognizable and trustworthy Brand/Tagline for the programs.</p>	<ul style="list-style-type: none"> • Launch integrated EE/ESA/DSM brand. 	<ul style="list-style-type: none"> • All ESA Program marketing and advertising campaigns (collateral, give-aways, direct mail, email, etc.) include the ESA Program brand. • The ESA Program provided t-shirts with the ESA Program brand.
<p>1.3: Improve program delivery.</p>	<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 continues to use PRIZM codes^b and delivers this information in Zip-7 lists through its WNA efforts, which allows ESA Program contractors to reach geographically concentrated eligible customer segments. • SoCalGas started to work with Federal and County Agencies serving United States Armed Forces Veterans as a way to facilitate their enrollment in Customer Assistance Programs: ESA, CARE, as well as other utility programs. • SoCalGas worked with water utilities and local water agencies to coordinate ESA Program water/gas conservation measures. Coordination includes sharing customer data and measure co-funding.

⁶ PRIZM codes are a set of area-based customer segmentation data widely used for marketing purposes in the United States. The data consists 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 consider a variety of factors, including income, preferences, lifestyles and purchasing behaviors.

Implementation Plan and Timeline		
Strategies	Mid Term 2012 – 2014	IOU strategy employed this program year
		<p>SoCalGas has agreements with Park Water Company and Eastern Municipal Water District.</p> <ul style="list-style-type: none"> To help contractors improve program delivery, SoCalGas continued to provide Enrollment and Assessment Workshops. SoCalGas, in compliance with D.12-08-044 OP 27, and in coordination with the other IOUs, developed a standardized statewide property waiver form for owners wishing to participate in the ESA Program. It is anticipated the new form will better facilitate program participation. The form will be rolled out during PY2014.
<p>1.4: Promote the growth of a trained Energy Savings Assistance Program workforce.</p>	<ul style="list-style-type: none"> Implement ESA workforce education and training. Coordinate resources for training related to ESA program needs to ensure delivery of ESA-trained resources to the program. 	<ul style="list-style-type: none"> In 2013, SoCalGas in coordination with the other Investor Owned Utilities (IOUs), interested parties and the CPUC's Energy Division, in compliance with Ordering Paragraph (OP) 9 of D.12-08-044, collected contractor data in seven WE&T areas. This effort utilized the reporting template developed in coordination the workforce education and training (WE&T) working group. The data was made available and evaluated by the WE&T working group. SoCalGas held focused weatherization, heating ventilation and air conditioning (HVAC), and natural gas appliance testing (NGAT) training classes at contractor locations and offices to improve installers' technical expertise. As part of SoCalGas' goal to leverage and develop WE&T opportunities, SoCalGas partnered with its Diversity Program and a third party to provide ESA Program contractors best practices surrounding topics such as communication skills, time performance, process mapping, and productivity.

Implementation Plan and Timeline		
Strategies	Mid Term 2012 – 2014	IOU strategy employed this program year

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

Implementation Plan and Timeline		
Strategies	Mid Term 2012 – 2014	IOU strategy employed this program year
<p>2.1: Increase collaboration and leveraging of other low-income programs and services.</p>	<ul style="list-style-type: none"> Continue to expand partnerships with stakeholders and seek new opportunities for data sharing. 	<ul style="list-style-type: none"> The ESA Program uses data sharing with the CARE Program to target customers for the ESA Program enrollment. Additionally, the ESA Program will enroll customers in the CARE Program when they have participated in the ESA Program and are not on CARE. SoCalGas worked with South Coast Air Quality Management District (SCAQMD) and Southern California Edison (SCE) to promote ESA Program weatherization in the Coachella Valley to assist with the goal to eliminate indoor pollution through infiltration measures. SoCalGas' ESA and CARE Programs have established a working relationship with the Asian Resource Center, a Community Based Organization (CBO) and member agency under the Community Help and Awareness with Natural Gas and Electricity Services (CHANGES) Pilot Program, by attending their events and promoting low-income utility programs in-language. The ESA Program will continue to work with its contractors,

Implementation Plan and Timeline		
Strategies	Mid Term 2012 – 2014	IOU strategy employed this program year
		<p>especially contractors that are CBO's, to sponsor contractor community events.</p> <ul style="list-style-type: none"> • See section 1.3 above on additional leveraging with Veterans organizations and water utilities. • Since implementation of its capitation program in PY2011, SoCalGas has contracted with four CBOs, resulting in approximately 300 enrollments from this endeavor.
<p>2.2: Coordinate and communicate between Energy Savings Assistance Program, energy efficiency and DSM programs to achieve service offerings that are seamless for the customer.</p>	<ul style="list-style-type: none"> • Continually reevaluate and update programs to take advantage of new technologies. • Explore in-home displays; home area networks and/or “pay-as-you-go” technology to assist low income customers manage their energy use. 	<ul style="list-style-type: none"> • The ESA Program continues to work with Energy Efficiency (EE) Programs, including an Integrated Demand Side Management (IDSMD) Single Point of Contact to reach and educate large housing portfolio owners and managers of low-income and general energy efficiency programs. • The ESA Program has participated in the California Services Department (CSD) pilot to jointly offer no-cost Solar Water Heater (SWH) installations to low-income single family residences. As part of this pilot, the ESA Program has coordinated externally with CSD, Energy Division, and other IOUs, as well as internally with SWH Programs and SoCalGas' Communications staff leads. • SoCalGas has leveraged sponsorships between the Customer Assistance and Advanced Meter Initiative departments, and has taken out advertisements in community newspapers to provide awareness of the CARE, ESA

Implementation Plan and Timeline		
Strategies	Mid Term 2012 – 2014	IOU strategy employed this program year
		Program, and New Meter initiatives in the community. SoCalGas participated in twelve community events in PY2013 with the Advanced Meter department.
2.3: Provide low-income customers with measures that result in the most savings in the Energy Savings Assistance Program.	<ul style="list-style-type: none"> Assess opportunities to incorporate new energy efficiency measures into the ESA program, e.g., plug-load reduction, new HVAC technology. 	<ul style="list-style-type: none"> SoCalGas continued to provide all feasible measures to customers' homes, such as attic insulation, furnace pilot retrofit kits, and high efficiency (HE) clothes washers, which lead to long-term energy savings. Also, by completing minor home repairs, such as to the door and building envelope, SoCalGas assisted customers by increasing the health, comfort and safety of their dwellings, and reducing outside air infiltration.
2.4: Increase delivery of efficiency programs by identifying segmented concentrations of customers.	<ul style="list-style-type: none"> Evaluate approach determine whether additional segments are needed. 	<ul style="list-style-type: none"> See Section 1.3 above regarding the use of PRIZM codes to reach geographically concentrated eligible customer segments.

1.2. Energy Assistance Savings Program Overview

The SoCalGas ESA Program serves all eligible low-income customers that are willing to participate in the program by providing all feasible ESA Program measures⁷ as determined through outreach and assessment and the installation process. In PY2013, SoCalGas saw continued growth in the number of homes treated through its ESA

⁷ See D. 08-11-031, at OP 15.

Program. The SoCalGas ESA Program treated a total of 106,948 homes,⁸ which was 78% of the homes treated goal of 136,836 adopted in D.12-08-044. Also in PY2013, 107,202 homes were weatherized.⁹

As part of its comprehensive services to eligible ESA Program participants, SoCalGas provided: in-home energy education to 107,465 customers, 86,834 homes received envelope and air sealing measures, 6,493 attic insulation improvements, 104,214 Domestic Hot Water measures, 26,750 furnace clean and tune measures, 54 forced air unit standing pilot change outs, and 2,432 duct seal weatherization measures. In addition, SoCalGas serviced 31,916 appliances including 1,804 water heater repair and replacements, 11,575 furnaces, and 18,537 high efficiency clothes washers. A total of 12,310 customers were classified as “ineligible” or “unwilling”¹⁰ to participate in PY2013, which represents approximately 12% of the number of homes treated in PY2013.

The average per home lifecycle bill savings for the PY2013 ESA Program was 135. Weatherization and appliance installations resulted in energy savings of 3,096,500 therms. The energy savings achieved through the 2013 ESA Program will contribute to the CPUC’s energy savings goals adopted for program year 2006 and beyond as set forth

⁸ Per D.02-12-019, the CPUC defines a “treated” home as an income-qualified home that has received any measure or service under the ESA Program, including energy education, compact fluorescent lamps, weatherization and appliances. Under the ESA Program, a treated home must receive all feasible measures for which it qualifies.

⁹Per D.02-12-019, the CPUC defines a “weatherized” home as a subset of treated homes, and are defined as income-qualified homes that have received any weatherized measures (e.g., weather-stripping and caulking) under the ESA Program.

¹⁰Ineligible & Unwilling is defined as leads that do not result in a customer enrollment based on one of the following reasons: customer refused; home does not meet minimum measure requirement; customer is moving; over income; owner refused for renter occupied single family; unable to provide homeownership documentation; or home weatherized under another program.

in D.04-09-060.¹¹ Furthermore, SoCalGas' ESA Program contributes to the CPUC's programmatic initiative.

On October 29, 2012, SoCalGas filed a Petition for Modification (PFM) of D.12-08-044. In its PFM, SoCalGas requested 1) approval of an augmentation to its ESA Program budget of \$38,603,684 due to higher than forecasted program costs, 2) add back of water heater blankets and pipe insulation measures for owner-occupied multifamily (MF) dwellings, 3) confirmation that the Commission did not intend to limit the ESA Program categorical enrollment process to only those households within the targeted self-certification areas, 4) authorize joint contracting for statewide program activities and, 5) revise the description of the ESA Program cost-effectiveness working group consistent with the CPUC desire to minimize the duplication of efforts. SoCalGas filed a supplement to the PFM on July 18, 2013 to provide additional clarity regarding the proposed augmentation to the ESA Program budget. As of December 31, 2013, the PFM had not been ruled upon by the Commission.

Associated ESA Program expenditures and therm savings are reflected in the following summary table.

1.2.1. Provide a summary of the Energy Savings Assistance Program elements as approved in Decision 08-11-031:

Program Summary			
	Authorized / Planning Assumptions	Actual	%
Budget	\$117,559,855	\$97,554,614	83%
Homes Treated	136,836	106,948	78%
Therms Saved	2,417,480 *	3,096,500	128%

* Value shown represents the estimated energy savings for Program Year 2013 associated with the requested funding in Application (A.) 11-05-018. Funding was increased pursuant to D.11-08-044, which did not contain an associated upward energy savings estimate.

¹¹ Findings of Fact 13.

SoCalGas managed a 10% increase in the number of homes treated in PY2013, reaching 106,948 compared to 96,893 treated the previous year, yet still fell short of the authorized annual goal of 136,836 units. Having ramped up to a historic high in PY2011, SoCalGas' contractor network adapted to the uncertainty of the PY2012 bridge funding period by approaching decisions concerning investments in field and office personnel and equipment much more cautiously, as described in the 2012 Annual Report. Although SoCalGas expected the return to long-term contracts would alleviate this issue, program capacity recovered only modestly in PY2013, despite SoCalGas' efforts to increase production. SoCalGas continues to adjust contracts and allocations in order to reward the most productive contractors and enable operating at full capacity, as well as to evaluate adjustments to the composition and deployment strategy for SoCalGas' contractor network.

SoCalGas places customer satisfaction as a core objective for the ESA Program. To evaluate and manage customer satisfaction performance relative to objectives, the company surveys customers and develops quarterly reports relative to the ESA Program as a whole, as well as to specific ESA Program contractors servicing customers. Customized evaluations are used to help ESA Program contractors understand customer viewpoints and to develop insight on ways to enhance and improve service delivery. SoCalGas maintains its commitment to work closely with its contractor network to drive program improvement and to retain these high customer service results.

The SoCalGas ESA Program's focus on customer satisfaction yielded substantial improvements in PY2013 over an already strong performance in PY2012. For PY2013, 55% of customers rated their overall quality of service as "excellent," compared to 49%

in PY2012.¹² In addition, 60% rated their sign-up experience as “excellent”, 56% rated their installation experience as “excellent”, and 60% rated the inspection process as “excellent.”

1.3. Whole Neighborhood Approach Evaluation

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).

The SoCalGas WNA for customer enrollment continued during PY2013 to help facilitate enrollment into the program. SoCalGas continued use of the Zip-7 codes (the five-digit postal zip code plus the first two digits of the four-digit zip code extension) methodology to target enrollment in neighborhoods with a likelihood of high concentration of eligible customers in PY2013. This methodology provides a greater level of detail on a neighborhood than traditional five-digit zip codes. SoCalGas uses 200% of the federal poverty level (FPL) as a factor to calculate the “estimated eligible” population in each Zip-7 area. SoCalGas extracted Zip-7 codes, identified smaller areas to target, and then used this data to create more refined canvass lists for contractors. Zip-7 codes also represent the highest level of detail included in the demographic information provided to SoCalGas by Athens Research.¹³

¹² SoCalGas’ PY2013 customer satisfaction rating of 55% at “excellent” represents an improvement over PY2012 when 49% of customers responded that service level was “excellent.” In PY2013, SoCalGas changed the customer satisfaction rating system to a 5-point descriptive scale for its survey (Excellent, Very Good, Good, Fair, Poor) and the performance goal set at the top rating (“excellent”). This replaced the PY2012 system which used a 10-point numeric rating scale and performance goals set at the top two ratings (“excellent” or “very good”). For PY2012, the ESA Program overall satisfaction scored 73%, as reported in the PY2012 Annual Report.

¹³ Athens Research is a contractor that develops large and small area estimates of demographic eligibility on behalf of all the IOUs.

In addition, SoCalGas continued to provide contractors with canvass lists utilizing PRIZM codes (as noted in Section 1.1.1 above, a data source that allows contractors to better determine the likelihood of a particular household's potential eligibility for participation in the ESA Program based on market characteristics). A set of instructions was included with every canvass list provided to contractors. Contractors also received regular information updates at the ESA Program contractor meetings.

In PY2013, the WNA methodology used a geographic segmentation strategy that compared customer account numbers contained in Zip-7 and other canvass lists against SoCalGas' Home Energy Assistance Tracking (HEAT) System, a database used for program tracking and reporting. This process determined if a particular household had previously been served by the ESA Program. Canvass lists were configured using this comparison so that only households that had not yet been served would appear. Other useful information, such as a customers' CARE status, are also shown to enable contractor effectiveness.

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 in the Whole Neighborhood Approach to program outreach.

SoCalGas continues its strategy of targeting customers based on energy usage, energy burden,¹⁴ and energy insecurity.¹⁵ One methodology that SoCalGas continued to employ in PY2013 was WNA. In PY2013, SoCalGas conducted WNA efforts, reaching high energy burden customers without neglecting low income customers with other energy needs. SoCalGas also conducted WNA efforts to

¹⁴ Energy burden is the ratio of customer energy bills to income.

¹⁵ Energy insecurity is related to late payments, and/or threatened service shut-off.

target low income areas using PRIZM code demographic information on households, which can be analyzed according to geographic social groups¹⁶ and sorted on a scale from highest incomes to lowest incomes. The PRIZM code tool allows SoCalGas to analyze energy burden, assuming that the lowest incomes have the highest energy burden.

By using the WNA to perform outreach to eligible customers with varying energy needs, along with using PRIZM code tools to analyze results, the ESA Program was able to use remaining program resources to focus on other high priority segments through general marketing activities. A key high priority segment was customers with disabilities. As previously stated, the purpose of employing this strategy was to promote the ESA Program to a greater number of customers and reach targeted segments.

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.

SoCalGas began its WNA effort in PY2009 and made adjustments that year to refine processes. In each of the subsequent years and again in PY2013, SoCalGas maintained program delivery strategies related to Identification, Outreach, Enrollment, Assessment, Measure Installation, and Inspections.

The WNA methodology in PY2013 targeted over 655,000 customers and ultimately enrolled over 14,000 eligible customers in the ESA Program. The Zip-7 methodology coupled with PRIZM codes appears to be a worthwhile strategy for identifying smaller, more manageable canvassing lists that contain households

¹⁶ Urban, Suburban, Second City, Town and County.

more likely to meet ESA Program eligibility requirements. WNA efforts are also a good way to help new ESA Program contractors get established and achieve success in their endeavors. SoCalGas continued its process that captures WNA efforts and documents which customers it has attempted to contact via this methodology. Beginning in PY2010 and continuing throughout PY2013, WNA campaign information and data tracking is uploaded using the HEAT System. Reports are prepared using data from the HEAT System to determine the results of each WNA effort. These reports provide an exhaustive list of customers that were included in each WNA effort.

Beyond the WNA efforts, SoCalGas has expanded outreach to deliver ESA Program information to customers using automated voice messaging (AVM) campaigns. This methodology helps to streamline the enrollment process by putting customers in direct contact with an ESA Program contractor in their area, thus eliminating the step requiring SoCalGas to act as an intermediary by assigning a contractor.

1.4. Energy Savings Assistance Program Customer Enrollment Evaluation

1.4.1. Distinguish between customers treated as “go backs” and brand new customers so that the CPUC has a clear idea of how many new customers the IOUs are adding to the Energy Savings Assistance Program.

SoCalGas continues its focus on offering the ESA Program to dwellings that have not been served by the program in previous years. SoCalGas enrolled a total of 106,948 customers in PY2013, with 2,610 (3%) of the homes treated considered “go backs.”¹⁷

¹⁷ Under the Statewide Low-Income Energy Efficiency 2010 Policy and Procedures Manual (P&P Manual), certain restrictions apply to homes that have been previously treated under the Energy Savings

Footnote continued on next page

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

In PY2013, SoCalGas continued to use categorical eligibility¹⁸ and self-certification¹⁹ as tools to streamline customer enrollments for the ESA Program. Categorical eligibility and self-certification streamline program enrollment because they decrease required income documentation. With categorical eligibility, customers who can provide documents proving participation in one of several state or federal programs do not need to provide additional income documentation in order to qualify for enrollment in the ESA Program and CARE.

Categorical Eligibility:

SoCalGas' Public Affairs and Media Relations Departments continued to inform the public at-large on the ESA Program and its enrollment requirements. Media Relations issues an annual press release on updated income guidelines and accepted categorical eligibility programs. SoCalGas continues to provide lists of categorical programs on its company website (found at www.SoCalGas.com) and in its ESA Program brochures, which are printed in multiple languages.

Self-certification:

SoCalGas conducted outreach and assessment refresher classes to help

Assistance Program. Under Section 2.8 of the P&P Manual, the IOUs are allowed to go back and treat any dwelling served prior to 2002, but they will first seek out new dwellings that have yet to be treated.

¹⁸ Categorical programs include: Medicaid/Medi-Cal, Women, Infants, and Children Program (WIC), and LIHEAP, 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.

¹⁹ In D.05-10-044 the CPUC allowed SDG&E and SoCalGas to continue to use 2000 census tract data to identify neighborhoods where they could suspend income documentation requirements and enroll customers in the ESA Program through self-certification, if those customers lived in areas where 80% of the households were at or below 200% of the FPL. In D.06-08-025, D.06-12-038, and D.08-11-031, the CPUC allowed continuation of the self-certification process described above.

increase awareness of all customer and home eligibility requirements for the ESA Program. These courses addressed topics related to the various avenues to enroll households such as self-certification, categorical eligibility, CARE Post Enrollment Verification (PEV), or full documentation. The classes also addressed eligibility, such as minimum measure/therm requirements, and other measure leveraging opportunities within low income programs.

SoCalGas enrolled 1,420 customers through the WNA in PY2013.²⁰ The WNA generated canvassing lead lists that are provided to ESA Program outreach contractors including the Zip-7 codes and CARE PEV status. Zip-7 codes and CARE status helped streamline customer enrollments by highlighting households that meet the self-certification criteria adopted in D. 05-10-044. In addition to WNA lead lists, contractors also used PRIZM codes to streamline their enrollment process through non-WNA efforts.

Ethnic-focused outreach including use of Ethnic-owned media channels:

SoCalGas purchased media advertising to reach many ethnic communities, and utilized ethnic-owned media as a means to effectively reach those customers. In PY2013, SoCalGas spent approximately \$150,000 on ethnic media, with approximately \$90,000 of that paid ethnic media going to ethnic-owned media.

Along with paid mass media and ethnic media advertising, SoCalGas participated in certain community events that drew the attendance of low-income customers and celebrated diversity in the community. In PY2013, SoCalGas participated in

²⁰ This number is based on contractor inputs of enrollment “lead source” into the HEAT system. The WNA total treated number is based on a HEAT query that identifies all customers provided on WNA canvass lists that enrolled in PY2013.

80 community events, many at no-cost to SoCalGas, that provided program awareness about the CARE and ESA Programs.

SoCalGas continued to build partnerships with organizations that help serve low-income customers in ethnically and culturally diverse communities. Such partnerships included Breathe LA, Imprenta Communications Group, 211, LA Campesina radio station, Los Kitos, and other non-profit organizations that understand local ethnic communities. By utilizing their connections to understand local ethnic communities, these partnerships assisted SoCalGas in promoting the CARE and ESA Programs.

For example, in PY2013, Imprenta Communications assisted SoCalGas at the grassroots level by targeting underserved Hispanic and Asian communities. Imprenta Communications provided value by participating in nearly ten Catholic Charities of Orange County events, and helped to reach Limited English proficiency (LEP) customers by explaining the CARE and ESA Program applications, and then helping them fill out the necessary enrollment documents. Furthermore, at certain events, Imprenta Communications was able to facilitate media support for the SoCalGas Customer Assistance Programs, which were later featured in ads in several major Vietnamese local newspapers such as Viet Bao, Vien Dong Daily, and Nguoi Viet Daily News.

Other value-added media that Imprenta Communications provided included program promotion and awareness for SoCalGas on the Facebook and Twitter websites that are popular among Asian customers. For the “Taste of Soul” event, a paid advertisement was taken out in October with African-American newspapers, such as LA Sentinel and LA Watts, to highlight SoCalGas’ participation in the event and to generate awareness for the CARE and ESA Programs. In addition, to reach out to the Hispanic community, El Clasificado, an

ethnic publication, was used to promote the CARE and ESA Programs with half page program advertisements.

Additionally, for the first time, SoCalGas launched a mobile communications campaign in English and Spanish to promote and enroll customers in the ESA Program. SoCalGas employed an ethnic-owned media company to deploy the campaign to the Hispanic customer segment. According to Pew Internet²¹ Center, Hispanics have the highest percentage of people who accessed the internet from their mobile devices. In PY2013, Pike Research²² conducted a study of low-income ethnic groups and the Hispanic segment had the highest access rate of the internet through a mobile device. The PY2013 mobile campaign ran for eight weeks between September 30th through November 25th, and allowed customers the ability to express interest in the ESA Program online through their mobile phones and receive follow-up information.

SoCalGas used ethnic-owned media whenever possible to promote and market the ESA Program, the discussion above highlights examples of paid ethnic media advertising deployed in PY2013.

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' ESA Program treated 106,948 homes in PY2013, a 10.4% increase over its PY2012 performance of 96,893, but this level fell short of the authorized annual goal of 136,836 units.

²¹ Pew Internet, 2012.

²² Pike Research, 2012.

The number of homes treated in PY2012, on the heels of a record-setting 161,020 units in PY2011, could easily be understood as a reflection of the uncertainty under which SoCalGas' contractor network was working: SoCalGas, as well as the other IOUs, operated under bridge funding for the majority of PY2012, while awaiting budget authority for the 2012-2014 program cycle. In this environment, contractors were reluctant to invest in equipment or to train new staff, which were critical in maintaining capacity.

Once the contractors received long-term contracts after the 2012 – 2014 funding decision was issued and budgets were authorized, it was SoCalGas' expectation that production capacity would soon return to PY2011 levels, and that the cycle goal could be reached. However, PY2013 has turned out to be only marginally stronger than PY2012, and SoCalGas' contractors collectively have yet to attain the monthly production levels sustained throughout PY2011. This was despite SoCalGas' best efforts to encourage contractors to increase production throughout the year, including mid-year contract adjustments to provide needed funds to contractors producing at or above goal, and the promise that contractors delivering high unit output would be rewarded with larger contracts in PY2014.

The outreach and enrollment of new customers has been identified as the constraint that prevented higher levels of production, as opposed to any lack of capacity to install weatherization measures. SoCalGas continues to evaluate the composition and deployment of its contractor network, and to make adjustments designed to create the proper incentives to increase productivity. SoCalGas also continues to work toward more efficient and effective marketing to Multifamily (MF) building occupants, specifically to gain the approval of building owners, as well as striving to penetrate hard to reach areas, including overcoming language and cultural barriers.

Furthermore, as the program enters its sixth year since adoption of the 2020 goal, a substantial portion of eligible customers who can easily be reached through the methods employed by SoCalGas' contractors have now been treated, and new methods are needed. SoCalGas has historically allowed its contractors to canvass neighborhoods door-to-door within their assigned territories as the most common method employed by the program to identify new customers to enroll. Although this method has been very successful in the past, it is by its nature susceptible to the depletion of accessible neighborhoods populated with eligible and untreated customers. As the program approaches its 2020 goal of reaching 100% of eligible customers, it is clear that more precise and methodical approaches will be needed. SoCalGas currently employs methods such as AVM campaigns and other centrally directed techniques by relying upon SoCalGas' data analysis capability to identify potential customers, and expects to continue to further develop and refine these methods.

In addition, SoCalGas' Customer Assistance Representatives (CARS)²³ will be deployed in PY2014 and is not expected to canvass neighborhoods, but instead will be centrally dispatched and scheduled to target hard to reach customers. This mode of enrollment will be more reliant upon effective data techniques. It may also help the program to overcome what SoCalGas views as one of its most challenging obstacles to enrollment, which is the contractor trust barrier for some customers. Many customers are resistant to allowing a contractor into their homes or to accept the ESA Program as offered by third party contractors, but among these, some may be more open to the offer made directly by a

²³ As authorized in D.12-08-044, CARS will deploy SoCalGas employees formerly working as meter readers, displaced by the Advanced Meter Initiative, in outreach specialist and dispatch roles, alongside SoCalGas' existing network of enrollment and outreach contractors.

SoCalGas employee, which enjoys a very strong customer reputation throughout the service territory.

1.5. Disability Enrollment Efforts

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

In PY2013, SoCalGas continued to work with organizations which come in contact with disabled customers throughout the SoCalGas territory. During PY2013, 14,978 households had a member identified with a disability and enrolled in the ESA Program. This represents approximately 14% of the total enrollments for the PY2013.

In PY2013, SoCalGas focused its efforts on engaging with organizations in its service territory that provide services to the disabled in an effort to promote the ESAP Program to customers with disabilities. The Braille Institute, the Deaf and Disabled Telecommunications Program (DDTP), and the Inland Empire Disability Coalition were organizations that SoCalGas partnered with in PY2013. All efforts were designed to follow the CPUC's directive to increase the number of households with disabilities that are outreached to and served by the ESA Program. Highlights of efforts to facilitate enrollment of customers with disabilities include:

- SoCalGas participated in a Diabetes and Diabetic Retinopathy seminar targeting disabled customers in March, 2013. The seminar was held in Los Angeles where the CARE, Medical Baseline, and the ESA Program information was made available to customers with special needs. SoCalGas was able to use its Customer Information System (CIS) to cross check whether customers were already enrolled in CARE and Medical Baseline to facilitate enrollment into the ESA Program.

- SoCalGas attended the Abilities Expo event at the Los Angeles Convention Center from March 15 – 17, 2013. The event drew more than 5,000 people throughout the three day period. SoCalGas educated over 350 disabled customers on CARE, ESA Program, and Medical Baseline. Many customers with children who received Medi-Cal were pleased to learn that their households qualify for CARE and the ESA Program.
- SoCalGas participated in the 9th annual Los Angeles DEAF Festival, held in Los Angeles. The festival was held on September 28, 2013 to generate greater public awareness of the Southern California deaf community. The event was a community gathering with information for deaf children, adults, and their families. SoCalGas had a bilingual American Sign Language interpreter at the event. Approximately 6,000 people attended, with over 300 attendees visiting the SoCalGas booth to receive information and enroll in the CARE, Medical Baseline, and the ESA Programs.
- SoCalGas participated in the 7th Annual Disabilities Sports Festival on October 20, 2013. The event attracted over 1,000 attendees. SoCalGas provided education on its Medical Baseline, CARE, and ESA Program to 50 attendees in both English and Spanish languages.
- SoCalGas participated in seven Walk Multiple Sclerosis (MS) events to raise funds for more than 19,000 people living with MS in Southern California. Most of these walks were held in April, 2013 and occurred in Pasadena, Fresno, Palm Desert, Ontario, Bakersfield, San Luis Obispo, the San Fernando Valley and Santa Barbara. SoCalGas also participates to educate customers on its ESA Program, CARE, and Medical Baseline. The events drew thousands of people; customers who visited the SoCalGas

booth had the opportunity to sign up and receive information about CARE, Medical Baseline, and the ESA Program.

- SoCalGas participated in three Western Center for Independent Living events in West Los Angeles. The Center strives to assist persons with disabilities to live independently and reside in their own homes. SoCalGas coordinated with SCE so customers could receive both of the utilities' customer assistance program information. The events were held on July 5, October 18, and December 13, 2013.
- SoCalGas continued its partnership with the DDTP²⁴ to cross-promote the CARE and ESA Program in their Southern California Telephone Access Program locations in Burbank, Riverside, and Santa Ana. Additionally, the DDTP link is displayed on SoCalGas' website page and the DDTP site also displays SoCalGas' website link to its low income programs.

SoCalGas continues to identify private organizations and CBOs in its service territory that provide services to disabled customers in an effort to promote the ESA Program to customers with disabilities.

- ESA Program contractors, such as Low-income Energy Efficiency Program (LIHEAP) agencies who provide services to customers with disabilities, also offered ESA Program services to interested customers.

In PY2013, SoCalGas focused its efforts on engaging with organizations in the

²⁴ This program is administered by the CPUC and provides assistive telephone devices and the California Relay Service (CRS).

SoCalGas service territory that provide services to the disabled in an effort to promote the ESAP Program to customers with disabilities. The Braille Institute, DDTP, and the Inland Empire Disability Coalition were organizations that SoCalGas partnered with in PY2013. All efforts were designed to follow the CPUC's directive to increase the number of households with disabilities that are outreached to and served by the ESA Program.

Section 1.5.4 describes other future opportunities for SoCalGas to partner with ESA Program capitation contractors, which builds SoCalGas' capacity to reach customers with special needs, by providing communication options such as American Sign Language.

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

Brochures with information about the ESA Program were sensitive to the Vision-impaired community. SoCalGas made Braille booklets available to customers in both English and Spanish to promote its Customer Assistance Programs. These booklets are available to customers during community events.

For the hearing impaired, SoCalGas uses a video in American Sign Language to inform customers about the ESA Program. SoCalGas also has closed caption videos in the assistance section of its website to promote the CARE, Medical Baseline, and ESA Programs.

To respond to needs of customers with disabilities, SoCalGas continues to modify its website to improve accessibility and the online experience. The SoCalGas website (www.socalgas.com) is working to comply with Web Content Accessibility Guidelines 2.0 AA criteria. This means that vision impaired customers who use screen readers and similar assistive technologies can

navigate the site and read its content. SoCalGas' My Account online bill pay system has already received the AA Seal of Approval from the Center for Accessible Technology for achieving AA accessibility standards. The My Account section of the website contains informational and explanatory videos on SoCalGas' Customer Assistance Programs.

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

Disability Enrollments			
Source	Total Enrollments	Disability Enrollments	% of Disability Enrollments
CARE Referral	1,163	75	6%
Direct Mail	1,302	213	16%
Energy Efficiency Referral	4,180	595	14%
LIHEAP	772	193	25%
Media/Leveraging Dept Event	150	30	20%
Neighbor/Friend/Relative Referral	4,075	644	16%
Newspaper/Radio/Television	160	21	13%
Other Utility Referral	2,078	355	17%
Outreach Specialist - Canvassing	68,979	7,136	10%
SoCalGas - Email	989	112	11%
SoCalGas - Internet	1,364	192	14%
SoCalGas Referral	2,960	532	18%
Telemarketing - Telephone	5,646	677	12%
Univision - Telethon	141	15	11%
Whole Neighborhood Approach	12,989	1,817	14%
Subtotal	106,948	12,607	12%
CIS ¹	N/A	2,371	N/A
Total	106,948	14,978	14%
Target Enrollment Rate			15%
¹ In order to capture all disability information available, enrollments from 2013 (pulled from the HEAT database) were cross referenced with customer disability information that is captured in the SoCalGas CIS database. Through this effort SoCalGas was able to count enrollments that were not originally identified by the Outreach Specialist as being disabled at the time of enrollment, but should be counted towards disability enrollment efforts.			

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

SoCalGas has identified various strategies to implement in PY2013 and is getting more successful in getting more customers with disabilities to self-identify and meet a 15% penetration goal for the disabled community. The identified strategies are as follows:

- In PY2013, SoCalGas made efforts to increase disabled customer enrollments by working closely and coordinating with media staff when participating in disabled events. Indeed, the number of enrollments increased relative to PY2012. SoCalGas engaged in the promotion of the ESA Program by contracting with local media publications, radio, print, and online sites to inform customers about SoCalGas Customer Assistance Program services.
- In PY2013, SoCalGas continued to use its ESA Program capitation program, which focuses outreach efforts to agencies serving clients with LEP, persons with a disability, and the elderly. As of December 31, 2013 SoCalGas had contracted with five CBOs, resulting in 314 enrollments.
- SoCalGas will continue to target customers participating in the Medical Baseline program through marketing campaigns, such as direct mail and AVM campaigns.

1.6. Leveraging Success Evaluation, Including LIHEAP

1.6.1. Describe the efforts taken to reach out and coordinate the Energy Savings Assistance Program with other related low income program offered outside the IOU that serve low income customers.

In PY2013, SoCalGas implemented an agreement (Please see ESA Table 14) with Riverside Public Utilities (RPU) that allowed customers residing in the two

utilities' overlapping service territories to benefit from both the SoCalGas and RPU low income program offerings during the same visit. Similar to previous agreements secured by SoCalGas with municipal utilities, SoCalGas partners with RPU to install a comprehensive mix of measures offered in the ESA Program and to deliver additional RPU electric measures to eligible customers. This approach provides an increased benefit in that customers are able to realize the energy and bill savings inherent in both sets of measures. Furthermore, the collaborative effort put forth to deliver the benefits of multiple programs during one visit will provide a more time sensitive solution to customers' needs.

In July of PY2013, SoCalGas and Park Water Company signed an agreement to leverage water rebates for High Efficiency Clothes Washers (HECWs) installed within the two utilities' joint service territories. Park Water Company serves the Compton/Willowbrook, Lynwood, and Bellflower/Norwalk water systems. As a result of this agreement, SoCalGas collected over \$42,000 in Park Water Company rebates to offset ESA Program funding.

SoCalGas also leveraged with Eastern Municipal Water District (EMWD). Cities in the EMWD service territory include Hemet, Menifee, Moreno Valley, Murrieta, Perris, San Jacinto, and Temecula. Leveraging allowed SoCalGas to collect rebates for HECWs installed at joint customer homes under the ESA Program. EMWD and SoCalGas' leveraging dates back to PY2010, and in PY2013, all funds set aside in the original agreement were exhausted. For the HECWs installed under this agreement in PY2013, the ESA Program collected over \$221,000 to the program. SoCalGas is working closely with EMWD to identify other ways to leverage.

Between the two water utility leveraging agreements, SoCalGas' ESA Program received about \$264,000 in co-funding for HECWs. Both partnerships help the ESA Program extend the authorized level of funding to reach more customers.

SoCalGas continues to collaborate with Metropolitan Water District (MWD) to develop a strategic partnership to leverage program funds from water conservation rebates for the installation of HECWs. MWD is the largest supplier of treated water in the U.S. and serves the most populous areas of SoCalGas' service territory. MWD, ESA Program, and an EE staff held several meetings in PY2013 to discuss leveraging.

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.

For SoCalGas' ESA Program dollar savings, energy savings/benefits, and enrollment increase tracking and reporting associated with leveraging efforts, please see ESA Program Table 14.

SoCalGas continued discussions to renew contracts for leveraging efforts with Imperial Irrigation District and Burbank Water and Power in PY2013. Additionally, SoCalGas entered into an agreement with Anaheim Public Utilities that includes a low-income energy efficiency component. In a larger context, these types of combined efforts are intended to result in fewer vehicles being dispatched for enrollment and installation processes, thereby aiding in the conservation of resources in a global, integrative, and sustainable approach. Furthermore, customers of these joint partnerships benefit from a full suite of measures, as opposed to customers receiving measures from just a single program. Customers will ultimately see a larger impact on their total energy and bill savings, and benefit from the additional comfort from a more comprehensive

measure package. Finally, receiving measures from multiple providers at the same time is a customer convenience and avoids duplicative verification, enrollment, installation, and inspection processes.

By working with EMWD and Park Water Company, their staff is now educated on SoCalGas' ESA Program and may raise awareness among their counter parts at other water utilities.

Leveraging with water utilities allows water districts and water IOUs to claim over 10,000 gallons per washer per year savings, and demonstrates SoCalGas support for statewide conservation efforts to address the water scarcity issues. HECWs costs may otherwise prohibit low-income customers from realizing the water and energy savings. For water utilities that do not have direct install programs with HECWs, leveraging with the ESA Program provides an opportunity to reach low-income customers that would otherwise not be able to fund the difference between the appliance cost and available water utility rebate offers.

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?

SoCalGas and the California Department of Community Services and Development (CSD) has continued to employ a leveraging framework as a means to increase participation from LIHEAP agencies that are also SoCalGas ESA Program providers, and to record installations of measures common to both ESA and LIHEAP to meet the three measure minimum requirement. The LIHEAP framework resulted in 477 leveraged enrollments in PY2013, compared with 400 in PY2012.

In PY2013, SoCalGas worked with the CSD on pilot programs to leverage IOU ESA Programs. In PY2013, SoCalGas provided marketing and outreach support for

CSD's Low-Income SWH installation program. Overall, in PY2013, SoCalGas sent over 11,500 direct mail pieces to ESA Program customers that were potentially eligible to receive a SWH. The direct mail pieces raised customer awareness regarding the potential opportunity to receive a no-cost SWH through CSD, and directed customers to CSD's call center. Also, SoCalGas participated in monthly meetings on the other geographic coordination, bulk purchasing, and data sharing pilots. This leveraging effort will continue, and SoCalGas plans to continue to work with CSD on joint leveraging pilots in PY2014.

1.7. Integration Success Evaluation

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

- Data Sharing:

The ESA Program shares data with CARE. Customers who are found in the ESA Program system are automatically enrolled for the CARE discount and exempt from PEV if their income eligibility has been verified by the ESA Program.

Additionally, the ESA Program uses lists of all eligible CARE customers who have not received ESA Program services to target marketing campaigns.

- Integrated Voice Recognition (IVR):

Multi-lingual ESA Program and CARE messages are made available on the SoCalGas' main call center IVR system. If a customer is establishing a new gas-service account, they will hear an automated message that includes information on Customer Assistance Programs including: CARE, ESA Program, and Medical Baseline. This message is also reinforced by live customer representatives when customers call-in to discuss bill payment arrangements.

- Branch Payment Offices:

ESA Program and CARE information is displayed or is available at SoCalGas' 47 branch payment offices. When income guidelines are updated each year, all branch offices receive new brochures, which are regularly replenished. Branch Payment Office Clerks are trained to promote both the CARE and ESA Programs.

- Customer Contact Center:

Customer Service Representatives (CSRs) provide information regarding Customer Assistance Programs to facilitate enrollment of eligible customers. Customers are informed about CARE at every call to initiate gas service or when making payment arrangements. When a customer inquires about the ESA Program, a direct 800 telephone number is provided. Also, SoCalGas integrated the ESA Program for residential customers by mailing a conservation package during customer contact center bill inquiries; the package included information on CARE, the ESA Program, Medical Baseline, energy efficiency rebates, energy-saving tips to help customers manage their gas bills, and was paired with information regarding CSD Programs.²⁵

- Email Campaigns:

SoCalGas deployed email campaigns in which both the CARE and ESA Programs were promoted to new SoCalGas customers.²⁶ New CARE customers with email addresses were encouraged to apply for the ESA Program via these email campaigns that feature ESA Program services, and

²⁵ In PY 2013, 4408 English and Spanish packages were sent.

²⁶ New SoCalGas customers received a welcome e-mail from SoCalGas informing them about available Customer Assistance Programs.

included links to drive customers to the on-line ESA Program request (lead) form.

- Credit and Collections:

During collection days, SoCalGas Field Representatives deliver pending disconnection notices in person to senior citizens and disabled customers.²⁷

Because collections involve customers who are struggling to pay their bills due to financial issues, customer assistance information is provided by the field collectors, who educate customers about CARE and the ESA Program.

- Joint Electronic Newsletter:

A quarterly e-newsletter “Outreach Around the Region” was sent to over 900 CBOs and CARE/ESA Program contractors. The e-newsletter served as a news update and included articles about SoCalGas’ ESA Program and CARE, including news about other SoCalGas programs.

- Winter Media Campaign:

The CARE and ESA Programs were promoted as part of the yearly winter media campaign to bring awareness to customers who are eligible to enroll and have not participated in the enrollment of these programs.

- Outreach by Field Employees

Field service employees distributed Customer Assistance Programs flyers to customers when entering the customer’s premises. Originally this distribution covered the “seasonal light” period (October through February), but during PY2013, the distribution occurred the entire year. Field bases that serve a

²⁷ SoCalGas customer service records on disability and age are captured in CIS. Customers self-identified as having a disability.

high concentration of low-income customers go through the flyers more quickly, and the outreach group replenishes the collateral when requested.

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

Integrated Demand Side Management

In PY2012, SoCalGas successfully participated in an innovative energy efficiency demonstration project in the city of Santa Ana with LINC Housing, California Housing Partnership Corporation, SCE, MWD, Santa Ana Public Works Agency and other stakeholders (also referred to as the “City Gardens” complex). In the lessons learned from this project, the Single Point of Contact was identified as a strategy for synchronizing the integration of various programs. In PY2013, SoCalGas’ ESA Program worked with a Single Point of Contact in SoCalGas’ EE to identify future comprehensive upgrade projects.

Energy Upgrade California™ Home Upgrade Program

In PY2013, the ESA Program continued to collaborate with the Energy Upgrade California™ Home Upgrade Program (HUP)²⁸ program for residential customers on the implementation of the Middle Income Direct Install (MIDI) Program Pilot. The MIDI Program will install no cost measures for customers living in single family or multifamily households whose income falls outside of the ESA Program income requirements (201-250% of the FPL). Eligible customers will receive energy education, which will explain HUP requirements and benefits.

²⁸ The Energy Upgrade California residential comprehensive whole house Energy Efficiency program was renamed in 2013 to the Energy Upgrade California™ Home Upgrade Program, or just the Home Upgrade Program.

The ESA Program gave the MIDI program a jump start by sharing program infrastructure information, and identifying and training the first joint-MIDI contractor. The MIDI Program is marketed by select contractors in the normal course of enrolling customers into the ESA Program. Customers that are above the ESA Program income guidelines and below 250% of the FPL are offered the MIDI Program. Furthermore, MIDI program participants are encouraged to install additional comprehensive energy efficiency improvements beyond MIDI Program offerings.

In addition to the MIDI Program, SoCalGas' ESA Program integrated efforts with the HUP MF rebate program. In PY2013, SoCalGas' ESA Program shared HUP MF program information at a nonprofit housing conference hosted by Southern California Association of Non Profit Housing (SCANPH). HUP MF marketing materials are distributed by the ESA Program and shared with large MF portfolio owners and managers that are interested in upgrades outside of SoCalGas' ESA Program measures. Additionally, the HUP MF program may complement the ESA Program measures that are not included.

Energy Efficiency Direct Install Programs

In PY2013, SoCalGas' ESA Program coordinated with EE Programs, focusing efforts to ensure that income qualified customers receive assistance from the ESA Program before receiving EE measures. The ESA Program has the largest impact and provides the most direct benefits to low income customers, and thus should be provided rather than receiving measure installations through other EE Residential Programs.

By assessing low-income customers for ESA Program measures before any EE installations are made, SoCalGas increases the likelihood that the three measure minimum standard within the ESA Program can be met. The three measure

minimum is of particular concern for SoCalGas, because as a single fuel utility, it has less potential measures to offer relative to dual fuel utilities. The coordination of ESA Program and EE programs is a proactive attempt to ensure that income qualifying households are assessed for ESA Program measures before any other measures that may prohibit the households from meeting the three measure minimum are installed.

In order to ensure the ESA Program is offered to eligible customers, both programs followed a process where the program contractors who install EE measures for the HUP MF Direct Install Program first send the sites targeted for installation to the EE Program Manager for review. Upon receiving the list of targeted sites, the EE Program Manager shares the list with the ESA Program to screen for complexes that have residents with a high probability of being eligible for the ESA Program. The MF complexes that are screened and removed from the list of targeted sites are forwarded to ESA Program contractors to contact and enroll individual residents from those complexes into the ESA Program. This process was established in order to ensure that all eligible low income customers are given the opportunity to achieve the maximum energy and cost savings offered by the ESA Program.

Lastly, one SoCalGas ESA Program contractor does 100% integration between the ESA Program and EE through the servicing of mobile homes. In PY2013, SoCalGas enrolled 4,696 customers as a result of this integration effort with the ESA Program/EE mobile home program.

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

SoCalGas ESA Program participated in monthly coordination meetings with the Local Government Partnership Programs and the Regional Energy Network.

Furthermore, the ESA Program has stayed in tune with various other Local Government Partnership efforts, including support of the Better Buildings Challenge.

1.7.4. Describe the new efforts in program year to integrate and coordinate the Energy Savings Assistance Program with any additional Energy Efficiency programs.

In PY2013, the new EE Financing Pilot Programs were authorized by D.13-09-044, and the ESA Program participated in initial discussions on how to support the future implementation of services that will be targeted to the low-income customer segment.

As part of the ESA Program MF strategy implementation, SoCalGas' ESA Program expanded its outreach to MF building owners and managers. To gain connections with non-profit affordable housing building owners and managers, the SoCalGas ESA Program exhibited in a key affordable housing conference hosted by SCANPH. By taking an active role in this event, SoCalGas' ESA Program was able to share low-income energy efficiency and general energy efficiency (MF rebate program) information with leaders in affordable housing. Furthermore, the ESA Program has followed up with several non-profit housing management companies to build relationships to better facilitate future program enrollments and support energy efficiency in affordable housing.

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

SoCalGas does not have a residential demand response program; therefore, this section is not applicable to SoCalGas.

1.7.6. Describe the new efforts in program year to integrate and coordinate the Energy Savings Assistance Program with the California Solar Initiative Programs.

A discussion regarding leveraging with CSD, focused on the CSI – Solar Thermal program, is addressed in Section 1.6.3 of this report. Such efforts will continue in PY2014.

1.8. Workforce Education & Training

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

Throughout PY2013, SoCalGas enhanced ESA Program WE&T by making improvements continuously to the delivery of its enrollment and assessment classes, In–Home Energy Education, and its customer enrollment forms.

All SoCalGas ESA Program WE&T services are provided by third party contractors. The SoCalGas ESA Program contractor network includes both privately owned companies and CBOs who recruit employees from low income communities. SoCalGas works with its contractor network to improve its Enrollment and Assessment training by continuously seeking feedback on training requirements and curriculum. In addition, all students who attended SoCalGas' Enrollment and Assessment training are asked to complete a class evaluation form to rate the class and provide feedback. Consideration is given to the student's feedback, and suggestions are incorporated where feasible. For example, a series of customer enrollment exercises were incorporated into the curriculum to assist Outreach Specialists in understanding the different methods available to enroll customers into the ESA Program. These exercises include completing a customer enrollment under different household compositions and sources of income. Although this has been a part of the curriculum in the past,

the exercises were updated and new scenarios were included to assist the students in understanding the practices being presented.

SoCalGas was expeditious in making curriculum changes and updates that resulted from any CPUC decision or studies. In response to the Energy Education Study findings and recommendations, SoCalGas developed a new presentation for its In-Home Energy Education curriculum that aligns with CPUC mandated topics to be covered such as gas appliance safety, earthquake safety and proper Compact Fluorescent Lamp (CFL) disposal, amongst other newly added topics designed to provide an organized energy education presentation by SoCalGas' Outreach Specialists. SoCalGas continues to develop the core elements of In-Home Energy Education, as well as the delivery methods, to ensure ESA Program participants are provided with both useful, relevant information and energy saving tips they can incorporate into their daily routines. This supports SoCalGas' goal of ensuring the information is easy to understand for the service providers delivering the In-Home Energy Education, and at the same time making them knowledgeable instructors of energy education.

As part of SoCalGas' goal to leverage and develop WE&T opportunities with ESA Program contractors and community organizations, back office training was offered to enrollment and assessment and installation contractors. The training was provided by Infinity Business Solutions and was sponsored in conjunction with the Company's Supplier Diversity organization. The back office training was designed to provide contractors with best practices surrounding topics such as communications skills, time performance, process mapping and productivity. SoCalGas worked closely with both Infinity Business Solutions and its Supplier Diversity to organize this training provided on December 9, 2013. Out of the 29 contractors invited to attend this training, 21 sent representatives, totaling 31 participants.

As part of the ongoing effort to provide continuous enrollment and assessment training to the ESA Program contractor workforce, 245 new Outreach Specialists were trained and badged in PY2013. This included students from two special enrollment and assessment classes provided at individual contractors locations to assist them in their ramp up efforts.

One important SoCalGas goal was the effort to retain the contractor workforce and decrease high turnover of Outreach Specialists by closely monitoring enrollment practices and providing refresher training throughout the year and after important program changes and/or updates. In PY2013, SoCalGas successfully provided four enrollment and assessment refresher courses attended by a total of 454 Outreach Specialists. This included two sessions held at the Energy Resource Center, where a total of 419 participants attended to receive training on forms associated with the enrollment process. The training was delivered over the course of two days, with a third day was reserved for contractor back office personnel to ensure that both contractors and Outreach Specialist received the same training. This supports SoCalGas efforts to improve and expand the training provided to both the office and field workforce. Ensuring that all personnel receive the same training mitigates confusion or misunderstanding of new policies and procedures at the time of implementation.

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

SoCalGas continued its internal training programs which contribute to the goals of workforce development. SoCalGas provides two areas of training:

1) enrollment and assessment and 2) ESA Program operations. To help facilitate and encourage student enrollment into training, SoCalGas manages several custom email inboxes to help streamline communications with its contractor

network. The ESA Program training supported by SoCalGas is critical in maintaining a high quality of service and program implementation for ESA customers. In addition when registration for classes is not at capacity, SoCalGas will take the initiative and notify it's enrollment and assessment contractor network of space availability to encourage new Outreach Specialist recruitment for the ESA Program.

SoCalGas requires contractors to ensure that their employees are trained in the jobs that they perform. ESA Program services, including enrollment and assessment, and installation of measures, are provided by third party contractors. Thus, the students attending these training classes are hired by the ESA Program contractor network. Some Outreach Specialists are subcontractors to the ESA Program contractors and may not be direct employees. However, all potential Outreach Specialists must successfully pass the required SoCalGas training and background check.

After successful completion of the Skill Level Test, the potential Outreach Specialist attends a mandatory 5-day class which reviews the requirements for program enrollment, assessment and in-home energy education. The 5-day class covers utility-specific items related to policies, the security process and overall customer service standards as well as leveraging opportunities amongst other low-income programs. A final exam must be passed for an Outreach Specialist to be registered and receive a SoCalGas badge. The total number of badged Outreach Specialists for SoCalGas in PY2013 was 57. The classes are held at SoCalGas' Energy Resource Center located in Downey, California.

During PY2013 SoCalGas did not identify any participation of previous U.S Census employees with its enrollment and assessment contractors for ESA Program outreach.

Type of training or recruitment conducted	Students¹ attended	Students² eligible
Skill Level Test ³	263	244
Enrollment & Assessment Class ⁴	255	245
¹ SoCalGas does not hire employees to provide outreach and assessment or weatherization services. The students that attend classes are recruited by SoCalGas ESA Program contractors. ² Students eligible refers to those who passed the necessary exams and/or are badged and thus, eligible to perform the job function related to the training. ³ Individuals are required to pass the skill level test to be eligible to take the Enrollment & Assessment Class. ⁴ Employees eligible refer to those individuals who successfully passed the Enrollment & Assessment Class.		

SoCalGas field operations training includes initial training for new participants in weatherization, inspections, HVAC and NGAT. Additionally, SoCalGas provides refresher training to address contractor issues and discuss new measures and procedures that have been implemented into the program. The class sizes range from 5 – 35 technicians. The representatives are hired employees of the ESA Program contractors, and are expected to arrive with the skill sets required to complete installation services. Installers were also given an aptitude test that they must pass in order to receive an identification badge to work under the SoCalGas ESA Program. This is in addition to a review of customer service standards and expectations. The table below summarizes field training efforts for PY2013.

The table below summarizes field training efforts for PY2013:

Class Type	Number of Students	Number of Classes
Weatherization and HVAC Initial	49	10
Weatherization Refresher	46	12
NGAT	34	4

In an effort to improve program delivery, SoCalGas provides its enrollment and assessment contractors with back office support and processing staff with training through Enrollment Workshops offered throughout the year. SoCalGas

hosts the workshops at the Energy Resource Center. There were a total of 85 workshop participants comprised of 26 out of the 30 enrollment and assessment contractors. These sessions addressed important program updates, provided an overview of new program requirements, and served as a general refresher course for all participants. SoCalGas believes that these workshops improved the participants' understanding of the enrollment process and customer enrollment requirements.

1.9. Legislative Lighting Requirements Status

Because SoCalGas is a gas-only utility, Section 1.9 is not applicable to the SoCalGas ESA 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.

Four statewide studies were authorized for the 2012-2014 ESA Program cycle. These statewide studies included: 1) an impact evaluation of the PY2011 ESA Program, 2) an ESA Program energy education study, 3) a low-income needs assessment study, and 4) a low-income MF segment study. D.12-08-044 was adopted at the end of August of PY2012. Consultants for each study were selected through bid processes conducted during the last quarter of PY2012. Contracts were awarded and work on each study began in the first quarter of PY2013.

All four studies were completed in PY2013. The delay in the issuance of D.12-08-044, combined with the logistics and technical requirements required to execute each of the studies according to the objectives outlined in D.12-08-044, posed some challenges for each of the studies which included the budgets

allocated and the extremely aggressive schedules of each study. Table 1.10.2 below provides an overview of the 2012-2014 ESA Program studies and a description of each study is provided below.

TABLE 1.10.2: 2012-2014 ESA PROGRAM STUDIES

ESA Program Study	Consultant	Managing Utility	Project Initiation	Public Meetings	Final Report
ESA MF Segment Study	Cadmus Group	PG&E	1/18/2013	3/5/2013 9/25/2013 11/13/2013	12/4/2013
ESA Energy Education Study	Hiner/KEMA	SCE	1/24/2013	3/7/2013 10/17/2013	10/31/2013
Low Income Needs Assessment Study	Evergreen Economics	SCE	2/22/2013	3/19/2013 12/3/2013	12/16/2013
ESA PY2011 Impact Evaluation	Evergreen Economics	SDG&E	1/23/2013	2/20/2013 8/7/2013	8/31/2013

Joint Utility²⁹ Low Income (MF) Segment Study

PG&E was the Contract Manager for the MF Segment Study and the research contractor for this study was the Cadmus Group. The central goal of the study was to develop market segment profile information to investigate promising comprehensive MF segment strategies. The strategies are to help develop and advance long-term plans to meet the needs of low income customers living in California MF housing as either owners or renters.

There were six key activities in this study designed to meet D.12-08-044’s research objectives:

1. Gather California MF housing data relevant for low income Customer Assistance Programs.
2. Catalog existing MF EE Programs relevant for low income customers.

²⁹ The Joint Utilities are PG&E, SCE, SoCalGas, and SDG&E.

3. Review and evaluate MF programs and research relevant for low income customers.
4. Identify and assess alternative program designs and delivery strategies.
5. Identify financing and funding options.
6. Solicit public comments at key decision points.

The study performed a literature review of low income MF programs to look at program design options being successfully implemented in other jurisdictions. Other data sources included a review of financing opportunities and analyses of census and demographic data. Interviews were also conducted with IOU program managers and MF stakeholders, in addition to conducting a phone survey with property owners and operators.

The MF segment study focused on the needs and issues of MF property owners and operators in their role as the ultimate decision-maker responsible for program participation in a WNA, especially because this focus was a response to the D.12-08-044 directive to explore a WNA.

One challenge for the study was the difficulty getting property owners to participate in the survey. This was especially true with market rate MF building owners, who own the majority of California MF properties. These building owners, representing the majority of MF properties, were much harder to reach than owners and operators of affordable housing properties who have greater incentive to participate in energy efficiency upgrade programs (due to federal requirements and tax incentives). This may be indicative of the challenges that may be expected in designing a program to reach low income tenants of MF dwellings.

A public workshop to discuss the Research Plan was held on March 5, 2013 in San Francisco. Two additional workshops were held to solicit public comments on the preliminary results (September 25, 2013) and the draft report (November 13, 2013). The Final Report was issued and posted on December 4, 2013.

The MF segment study found that 30% of all California residential households qualify for the ESA Program statewide, low income MF households represent approximately 9% of total California residential households, 7% of these low income MF households live in market-rate buildings, 2% in affordable housing, and less than 1% own their unit. Changing the focus to all low income households, the study found that 32% of low income households reside in MF buildings with five or more units. The percentage of low income MF households varies widely across the IOUs, ranging from 27% to 39%. Finally, when viewed across the spectrum of all California MF households, 42% of households qualify as low income.

Joint Utility ESA Program Energy Education Study

The prime research contractor for the ESA Program Energy Education study was Hiner and Partners, with KEMA employed in a subcontractor role. SCE was the Contract Manager. The overall purpose of the Energy Education Study was to identify ways to optimize and/or improve the educational component of the ESA Program. The two primary objectives of the Energy Education Study were to find improvement opportunities concerning: 1) how energy education is provided, and 2) what materials and content are provided. The Energy Education study examined both current and potential best practices across the IOUs and comparable efforts done elsewhere to inform potential improvements to this component of the program.

Overall, the study found the ESA Program's Energy Education assisted customers by providing information that helped them save money on their energy bill and addressed some of the barriers to reducing energy consumption in their homes. In terms of overall delivery of education, the study found that the interactive customer-specific delivery process is effective and follows best practices. In addition, assessor recruitment, selection, and retention processes, and training has been effective, although varied across the IOUs. Recommendations for potential improvements are offered around the use of some of the best practices that may be adopted across the joint utilities. In addition, the study found that the benefits of the education are such that it may be prudent to support the provision of education at the time of the assessment, even if the home does not qualify for other measures.

Regarding educational content, the Energy Education study found that while the materials are relatively comprehensive, some suggestions for modifications and improvements were offered. Most notably, the study found that customers are seeking more information on specific and practical appliance cost of use information. The final study results were presented at a public workshop on October 17, 2013 and the final report was issued and posted on October 31, 2013.

Joint Utility Low Income Needs Assessment Study

The Low Income Needs Assessment (LINA) Study was a statewide study managed by SCE. Evergreen Economics was the research contractor. The previous study was over five years old and relied on data collected nearly 10 years ago. The overall study objective was to provide information on the needs of the low income customers eligible for the ESA Program and CARE. In particular, the study was expected to: report estimates of eligible households, inform updates of remaining energy savings potential, assess customer perceptions and

accessibility of the programs, willingness and barriers to participate, energy burden and insecurity, energy-related needs, and non-energy benefits. Select results and conclusions of the LINA study include the following:

- Roughly 32% of California IOU households are eligible for the ESA Program and CARE. 95% of eligible IOU households were enrolled in CARE as of the end of PY2012,³⁰ and 59% of eligible households have been treated by ESA Program.
- Both the ESA Program and CARE have been effectively reaching households in areas having key markets with customers in need. The ESA Program has been less successful reaching areas with more renters, extreme poverty, and higher energy usage.
- Key barriers to ESA Program participation include trusting a contractor, getting the landlord's approval, being home for appointments, and needing services the program offers. Providing income documents was not found to be a barrier.
- Roughly 52% of eligible customers are willing to participate in the ESA Program. This is significantly fewer than was estimated by the previous Needs Assessment study, which indicated that 95% were willing to participate.

³⁰ Note that as the IOUs increase PEV, the penetration rate is going down as more households are removed from the program. "Needs Assessment for the Energy Savings Assistance and the California Alternate Rates for Energy Programs" Report by Evergreen Economics, dated December 26, 2013.

- The mean energy burden is estimated at 8%.³¹ This is statistically unchanged from PY2005 data collected for the previous LINA study.
- Single-family renters have greater energy-related needs and barriers to participation than single family homeowners and multifamily dwellers.
- The average CARE customer saves \$29/month (33% savings) on their electric bill and \$6/month (18% savings) on their gas bill.
- 81% of ESA Program participants notice a reduction in their energy bills and between 44% -64% notice improvements in health, comfort, and safety. The energy savings results are consistent with actual changes in bills.
- Self-reported data suggests that HVAC and weatherization measures are more likely to generate savings and improvements in health, comfort, and safety. The next most beneficial measure was a refrigerators by electric service providers.

The final study results were presented at a public workshop on December 3, 2013, with the final report issued in three volumes and posted on December 16, 2013.

Joint Utility 2011 ESA Program Impact Evaluation

The Impact Evaluation was a statewide study managed by SDG&E. The prime research contractor for the PY2011 ESA Program Impact evaluation was Evergreen Economics. The primary objective of this evaluation was to estimate

³¹ Based on taking the mean of customer-level ratios of energy burden.

first-year electric and gas savings and coincident peak demand reduction attributable to the PY2011 ESA Program. The results are used to quantify the PY2011 ESA Program achievements, document the relative value of various measures in producing energy savings, produce savings forecasts, and meet filing and reporting requirements, including informing the development of the 2015-2017 ESA Program Application.

The methodology used in the study was a fixed effects billing regression model. Savings estimates were developed at the measure and household level. The study also conducted a customer phone survey of 602 participants whose billing data indicated increased usage in the period directly after program intervention. In an effort to find the best fit, various model specifications were used in the analysis. The final measure-level estimate values were chosen based on whether or not the ex-ante value fell within the resulting 95% confidence interval of the impact estimate and if not, evaluator judgment was used to assign a value from an alternate model or use the ex-ante value.

The impact study found that savings from the ESA Program measures was a small fraction of overall household energy consumption, and that a significant number of ESA Program participant households are actually using more energy after their participation in the ESA Program. Evergreen Economics posited that customers may be unaware that they are using more energy. The final impact estimates were generally consistent with the ex-ante savings values, although there is some deviation from the previous evaluation and from DEER values. Some natural variation across years was expected due to a variety of factors which included weather, measure mix, and participant demographics.

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.

All four Statewide Joint IOU studies were completed in PY2013 and final reports are available at www.energydataweb.com. Budgets spent compared to authorized budgets are included in Table 1.10.

**TABLE 1.10.3³²: 2012-2014 ESA PROGRAM STUDIES:
AUTHORIZED VS. EXPENSED BUDGETS**

ESA Program Study	Consultant	Managing Utility	Budget Authorized ³³	Budget Expensed	%*
ESA MF Segment Study	Cadmus Group	PG&E	\$400,000	\$399,340	100%
ESA Energy Education Study	Hiner/KEMA	SCE	\$300,000	\$217,195 ³⁴	72%
Low Income Needs Assessment Study	Evergreen Economics	SCE	\$700,000	\$699,997.00	100%
ESA PY2011 Impact Evaluation	Evergreen Economics	SDG&E	\$600,000	\$489,364	82%

* Values rounded to nearest percent.

³² The expensed amount reported does not include the final invoice which is expected to bring the total to the contracted amount of \$250,764 for The Energy Education Study.

³³ This amount represents the total authorized Joint Utility study budget, and not PG&E's 30% share of the budget. The authorized Joint Utility budget split is: PG&E--30%, SCE--30%, SoCalGas--25%, and SDG&E--15%.

³⁴ The expensed amount reported does not include the final invoice which is expected to bring the total to the contracted amount of \$250,764 for the Energy Education Study.

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).

SoCalGas did not undertake any Pilots in 2013; thus, this section is not applicable to SoCalGas.

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.

This section is not applicable to SoCalGas.

1.12. "Add Back" Measures

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 Energy Savings Assistance Program measures, how does the IOU propose to address the shortfall in other parts of the Energy Savings Assistance Program?

The inclusion of "add backs" in the current program will not impact the utility's ability to meet the 2020 plan goal that 100% of eligible and willing customers will have received all cost effective ESA Program measures because SoCalGas is able to control program costs and deliver all feasible measures to customers through effective program management. The total count and expenditures related to "add back" measures are provided in ESA Program Table 16. Because SoCalGas does not currently anticipate adverse impacts to the program, it will continue to install the "add back" measures, when feasible.

2. CARE EXECUTIVE SUMMARY

The SoCalGas CARE program, formerly known as the Low Income Ratepayer Assistance Program (or LIRA) was established through a legislative mandate and was implemented by the Commission in D. 89-07-062 and D. 89-09-044. The Commission expanded the program to qualified non-profit group living facilities such as women's shelters and homeless shelters in 1992. The program was further expanded to qualified agricultural employee housing facilities in D.95.10-047. In 2005, D.05-04-052 expanded the program to include authorized agricultural housing facilities managed by the Office of Migrant Services and other non-profit migrant farm worker housing centers.

Since PY2005, income eligibility for CARE was set by the Commission at 200% of the Federal Poverty Guidelines.³⁵ In PY2010, the legislature enacted Senate Bill 695 which changed section 731.9 of the Public Utilities Code to state that eligibility for the CARE Program should be no greater than 200% of the Federal Poverty Guidelines. In PY2006, the Commission authorized utilities to implement: 1) Categorical Eligibility which allowed customers to qualify for CARE based on participation in certain other state or federal assistance programs; 2) four-year recertification for low income customers on a fixed income; 3) a process to enroll certain prospective CARE-qualified households by telephone; 4) a process to all customers to recertify their CARE eligibility through the IVR system; and, 5) internet-based CARE enrollment and recertification.

In D.08-11-031 the Commission expanded the list of categorical eligible programs to align with the program-based eligibility programs adopted for the Commission's

³⁵ D. 05-10-044.

California Lifeline Program and established an enrollment goal for CARE at 90% of the estimated eligible population.

CARE was authorized for the 2012 – 2014 program cycle pursuant to D.12-08-044, approved by the Commission and issued on August 30, 2012. In approving the program, the Commission retained the 90% penetration rate target of the prior program cycle and outlined in D.08-11-031, with direction to utilities to focus on aggressive outreach activities and other program enhancements to ensure the integrity of the CARE Program. Other key initiatives include updates to the utilities' post-enrollment verification probability model to include more indicators, a process to review and update the list of categorical programs annually, and approval of outreach and marketing funds focused on targeting multi-cultural/multi-lingual and limited English proficient (LEP) customers.

This report provides information on the SoCalGas CARE program accomplishments and expenditures for PY2013. At year-end of PY2013, the CARE Program had enrolled over 225,456 new customers and ended PY2013 with a penetration rate of 89%. The 12 month average penetration rate was 91%. SoCalGas continues to work towards meeting the CPUC directed CARE Program goals and objectives. Various results for PY2013 are provided in the sections below.

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.

CARE Residential Program Customers by Month		
Month/Year	Customers	% Change
Jan-13	1,653,606	0.26%
Feb-13	1,649,670	-0.24%
Mar-13	1,649,304	-0.02%
Apr-13	1,651,582	0.14%
May-13	1,651,119	-0.03%
Jun-13	1,643,311	-0.47%
Jul-13	1,638,727	-0.28%
Aug-13	1,630,075	-0.53%
Sep-13	1,618,685	-0.70%
Oct-13	1,612,495	-0.38%
Nov-13	1,611,542	-0.06%
Dec-13	1,604,411	-0.44%

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.

Throughout PY2013, SoCalGas used the jointed utility methodology approved and adopted by the CPUC in D.01-03-028 for estimation of CARE eligibility rates. This method entails annual estimation of CARE eligibility at the small area level (block group, census tract, zip code, etc.) for each utility as well as for the state.

Sources for this estimation include the CPUC's current CARE guidelines, current year small area vendor marginal distributions on household characteristics, Census Public Use Microdata Sample (PUMS) 2007-2011, American Community Survey ("ACS/PUMS"), U.S. Census and Integrated Public Use MicroData Series ("IPUMS-CPS") from the Minnesota Population Center, University of Minnesota, Labor Market Information Data ("EDD/LMID") from the California Employment Development Department, and additional data sources, including estimated small area unemployment data from Synergos Technologies, Inc.

For PY2013, the continuation of the PY2012 decoupling of one and two person household income limits kept the eligibility relatively the same. It should be noted that California Assembly Bill (AB) 327 changed the eligibility guidelines for the CARE program, by making the income eligibility for a one-person household the same as the eligibility guidelines for a two-person household, to be effective in January 2014.

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

In D.12-08-044, the Commission granted the Joint Utilities' request to file the annual CARE eligibility estimates on December 31 of each year. On December 21, 2012, Southern California Edison along with the other IOUs requested an extension to file the updated CARE eligibility estimates for 2013 and was submitted to the Commission on February 11, 2013.

Updates were performed on a quarterly basis. During PY2013, SoCalGas customer eligibility estimates did not materially change.

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).

To derive the estimates of current CARE-eligible meters, SoCalGas counts all residential individually metered and residential sub-metered units. This equation equals the number of eligible residential meters for the CARE Program in the SoCalGas territory.

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

Each quarter (January, April, July and October), SoCalGas applies the county and utility eligibility rates to its current set of CARE-eligible meters that includes both individually and sub-metered housing units. Once the factors are applied, estimates for CARE eligible-households by county are developed.

2.1.2.4. Describe how current CARE customers were counted.

Currently CARE customers were counted by totaling the number of individually metered residential customers plus the number of sub-metered tenants receiving service through residential master-metered accounts receiving CARE discount at the time.

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 is:

$$\frac{\text{Number of CARE Customers}}{\text{Number of Estimated CARE-Eligible Households}}$$

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 of PY2013, of SoCalGas' 5,425,000 CARE eligible meters, 33% or 1,798,002 households 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 the year-end of PY2013, SoCalGas had 144,122 sub-metered tenants in 1,820 master-meter facilities. Assuming, by the methodology described above, 51% of its sub-metered residential customers are eligible for CARE, SoCalGas estimates 73,502 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 the year-end of PY2013, SoCalGas had 34,037 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 46% of its CARE eligible sub-metered tenants were enrolled in the CARE Program at year-end of PY2013.

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

In PY2013, SoCalGas did not encounter any problems in administering the CARE Program for sub-metered and/or master-metered customers.

CARE Program Summary

2.2. Please Provide CARE Program Summary Costs

CARE Budget Categories	Authorized Budget	Actual Expenses	% of Budget Spent
Outreach	\$3,845,745	\$3,921,870	102%
Proc., Certification and Verification	\$4,456,213	\$983,603	22%
Post Enrollment Verification	\$3,744,000	\$318,737	9%
Information Tech./Programming	\$2,669,534	\$437,298	16%
Pilots (2)	\$180,000	\$150,000	83%
Measurement and Evaluation	\$51,484	\$0	0%
Regulatory Compliance	\$234,962	\$304,368	130%
General Administration	\$915,488	\$698,640	76%
CPUC Energy Division Staff	\$60,000	\$17,230	29%
Cooling Centers (3)	N/A	N/A	N/A
Total Expenses	\$16,157,426	\$6,831,747	42%
Subsidies and Benefits (4)	\$129,892,840	\$118,556,705	91%
Total Program Costs and Discounts	\$146,050,266	\$125,388,452	86%

2.2.1. Please provide the CARE program penetration rate to date.

CARE Penetration Year-end 2013			
Participants Enrolled	Eligible Participants	Penetration rate	Target Met?
1,604,411	1,798,002	89.23%	No*

*Please refer to CARE Table 2. The 12 month average penetration rate was 91%, with enrollment above target level for the months of January – September.

2.2.2. 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.

CARE Recertification

Month	Complaints Received	Nature of Complaint	Cases Resolved
January	2	Customer was unable to recertify through the automated system. Customer claimed she mailed application and again recertified through website but was terminated. CARE department did not receive either submission.	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 PY2013 was \$5.89³⁶ per month.³⁷

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

SoCalGas' CARE customers and expanded CARE customers that include farm and migrant workers, and those living in non-profit group living facilities or agricultural housing, received \$115,515,260 in natural gas rate discounts and \$3,041,445 in Service Establishment Charge (SEC)

³⁶ The average monthly rate discount was computed by dividing the CARE rate discount recorded to the CARE balancing account in 2013 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.

³⁷ This number does not reflect the CARE customers who received a discount on their Service Establishment Charge.

discounts in PY2013. The PY2013 annual subsidy for all SoCalGas CARE customers exceeded \$118 million.

2.3.2. Administrative Cost

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

See section 2.2, above, or CARE Table 1 in the attachments.

2.3.2.2. Explain what is included in each administrative cost category

Outreach: This category includes costs for the printing and mailing of CARE applications and correspondence, the printing and mailing of Senate Bill (SB) 920 annual notification³⁸, 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 and Certification: This category includes costs for the CARE Processing Group labor and document scanning costs. The function of the CARE group includes: 1) opening and sorting CARE application forms; 2) processing CARE applications; 3) initiating and responding to

³⁸ SB920 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.

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, and 5) SoCalGas' CARE forms scanning operations.

Post Enrollment Verification: CARE eligibility verifications are tracked separately. This category includes staff labor costs for processing the verification applications and supplemental documentation, handling verification-related calls, and training.

Information Technology (IT) Programming: This category includes IT labor costs to maintain the SoCalGas CARE application billing system, CARE IVR applications, CARE on-line applications, CARE documents, CARE database, system reports, data exchanges with other utilities, charges to conduct system enhancements to comply with Commission mandates, and improvements in operational efficiency.

Pilots: This category includes costs related to the CHANGES Pilot program.

Measurement and Evaluation: This category includes costs for the annual CARE eligibility rate updates and other evaluation activities.

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 such as attendance at working group meetings, public input meetings, and other Commission hearings or meetings.

General Administration: This category includes 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 of PY2013, the CARE balancing account was over-collected by \$44,346,363.

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 discounts, all rate discounts, surcharge revenues, amortization, interest, and administrative costs described in Section 2.3.2.2. The costs recorded in the CARE balancing account are not included in base rates.

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.

Utility Outreach: The objective of CARE Outreach is to maintain awareness with mainstream customers while expanding awareness to hard-to-reach customers. To meet this goal, SoCalGas continued to use both traditional communication and grassroots tactics to extend awareness and participation in the CARE

Program. Traditional tactics include mass media advertising purchases, direct mail, automated messaging, bill inserts, door-to-door canvassers, and participation in community outreach events. In addition to these traditional tactics, SoCalGas has continued to work with community and faith-based organizations to enhance awareness of the CARE discount.

Ethnic Media: Ethnic media plays a crucial part in communicating with hard-to-reach customers. SoCalGas has an ongoing advertising contract with Radio Campesina (KMYX, Bakersfield & KUFW, Visalia) to encourage awareness of Customer Assistance Programs, especially among farmworkers with LEP. The radio spots are short, 30 second Spanish language ads that run several times a day. During the summer, these radio spots complement weekly lunches that SoCalGas sponsors for farmworkers in the fields. SoCalGas representatives meet farmworkers during their lunch break, and Radio Campesina broadcasts spots from the field. SoCalGas also had an ongoing advertisement in a Spanish-language newspaper in Visalia (Nuestro Tiempo), Riverside (La Prensa Hispana), and in Los Angeles and Orange Counties (El Aviso). These ads are ongoing. Ethnic advertising is not a stand-alone concept with SoCalGas outreach, but is integrated into all communication campaigns. Therefore, the mass media campaigns discussed in the next section should also be viewed as ethnic outreach.

Mass Media: SoCalGas ran three major media campaigns during PY2013, and ethnic audience and ethnic ownership of the media outlets played a significant part in the overall strategy:

1. June/July: Digital/Print Media Campaign to Reinforce the June Bill Insert.

The new CARE eligibility guidelines are implemented every year in June. A bill insert details the updated guidelines. SoCalGas ran a mass media

campaign to reinforce the bill insert. In addition to the ongoing newspaper ads, SoCalGas took out additional ads in a variety of primarily ethnic owned newspapers in Southern California. The “buy tactic” was to target news in Spanish language, Chinese language, and African-American readership. This campaign also deployed online advertising, with emphasis on Spanish language advertising. In addition to newspaper and online advertising, the summer campaign also included an “out-of-home” component that included a series of English and Spanish language posters placed on public transportation.

2. August, September: Spanish Language Digital Campaign in tri-coastal counties of Ventura, Santa Barbara, and San Luis Obispo.

To address low enrollment figures in Ventura, Santa Barbara, and San Luis Obispo counties, and cost advantages in purchasing mass media in non-Los Angeles and non-Orange County markets, SoCalGas’ Outreach coordinated the development of a digital, out-of-home, radio, and newspaper campaign in these three counties.

3. November to December: Spanish Language Digital Campaign in tri-coastal counties of Ventura, Santa Barbara, and San Luis Obispo.

Because of the cost advantage and the need to create an ongoing sense of awareness in low-enrollment counties discussed above, CARE Outreach decided to continue the media campaign during November and December in PY2013.

Direct Mail: Direct mail continues to be a versatile and effective method for enrolling CARE customers. SoCalGas increased its direct mail advertising from the previous year. During PY2013, SoCalGas sent out approximately 1.2 million direct mail pieces. Approximately 51,000 customers enrolled in the CARE

Program through direct mail. Most of the campaigns targeted existing customers with a probability of being eligible for the CARE Program based on attributes such as PRIZM code. In addition, SoCalGas purchased Nielsen demographic data to supplement its demographic targeting. SoCalGas also sent targeted direct mail pieces to new customers with the rationale behind these campaigns being that the new customer might be more receptive to mail communication. During PY2014, SoCalGas will continue to send direct mail to new customers with a unique code to provide better metrics on the comparative effectiveness of various direct mail pieces. Additionally, SoCalGas continued to conduct its annual SB 920 targeted mailing (see Section 2.3.2.2. above) in its service territory to the 1,820 master-metered facilities with sub-metered customers in PY2013.

SoCalGas continues to maintain compliance with AB 2104 by mailing out the monthly *Add & Delete* report to notify owners/managers of sub-metered facilities about tenants who have been added to CARE or removed from the program. Lastly, SoCalGas remains in compliance with AB 2857 by approving eligible sub-metered tenants who live in a facility that is not 100% sub-metered.

Bill Message: During PY2013, quarterly CARE bill messages were printed in both English and Spanish on non-participating customers' bills. Additionally, when applicable, CARE bill messages were sent out 45 days after PEV letters were mailed to remind customers that SoCalGas had not received their verification application and proof of income. Further, if after 120 days SoCalGas had not received a customer response, SoCalGas sent those customers a bill message informing them that they had been removed from the program.

Bill Inserts: Bill inserts are a low-cost method to create program awareness and encourage enrollment. The insert/applications are bilingual in English and

Spanish, and contain basic information. The July PY2013 bill insert highlighted the new income eligibility qualifications. During July, approximately three million bill inserts were sent to customers that were residential customers not on the CARE program. In addition to the general market bill insert in July, SoCalGas also sent out a bill insert to commercial customers. The bill insert went out to approximately 250,000 customers in September and described the CARE rate for certain commercial facilities such as non-profit group living and migrant farmworker housing. As reported above, SoCalGas used local and mass media (including ethnic) to reinforce the July bill insert.

Automated Voice Messaging: In order to encourage eligible customers to remain in the CARE Program, SoCalGas sends an email when an address is on file and initiates an automated phone call to customers whose CARE eligibility is about to expire. The email prompts the customer to go to a web site where the customer can re-enroll online. The automated phone call allows the customer to re-enroll when receiving the call. In the event the customer does not answer and the customer has an answering machine, the customer is directed to call a toll-free number.

Cross Program Promotion: SoCalGas coordinated communications for the CARE Program, as well as its other programs and services in a manner that provided clear, comprehensive, and consistent messages to its customers. Communication and outreach opportunities were 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 ESA Programs are conducted on a rolling basis. The ability to apply for CARE through SoCalGas' ESA Program applications made it easier for customers to obtain services and other SoCalGas assistance program information

simultaneously. Customer information obtained from SoCalGas' ESA Program and Gas Assistance Fund (GAF), 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. Field Operations is instructed to leave a bilingual flyer in English and Spanish every time a customer's home is entered for services. This policy was formerly in effect during the heating season during October through February, but it is now in effect year round.

SoCalGas.Com Website: The SoCalGas website (www.socalgas.com) was a component of virtually all communications. Website content, in English and in Spanish, was regularly updated to ensure customers were provided with current information. In addition to online English and Spanish CARE applications, SoCalGas' website also offers CARE applications in Arabic, Armenian, Chinese, Hmoob, Farsi, Khmer, Korean, Russian, Tagalog, Thai and Vietnamese. Customers may enroll online using one of these "in-language" applications or download an application, complete it, and return it through U.S. mail to SoCalGas for processing. SoCalGas' web based outreach efforts included monthly e-mail blasts consisting of targeted electronic newsletters and e-mails promoting the CARE Program.

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 can 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 continued to be staffed with bilingual (English and Spanish) representatives. Vietnamese, Korean, Mandarin and Cantonese telephone lines are staffed from 8:00 am to 5:00 pm, Monday through Friday, in the CCC. Deaf and hearing impaired customers may contact the CCC through its TTY/TDD equipment 24 hours a day, seven days a week. Additionally, SoCalGas' call center is equipped to provide service in 170 languages through the *Language Line Service*, a third-party translation service which is available to customers 24 hours a day, seven days a week. For hearing impaired customers, a toll-free number is also provided.

Branch Payment Offices (BPO): English and Spanish CARE applications and program information brochures are available in all BPOs and the CARE Program is promoted during every transaction. Furthermore, English and Spanish CARE posters that are complete with program guidelines and helpful information are on display in each BPO. These posters are revised as program information and income guidelines change.

Community Events: During PY2013, SoCalGas personnel participated in general and low-income specific community events. The goal of each event was to promote awareness of and participation in Customer Assistance Programs. The events included:

- Abilities Expo
- Mother's in Action, Back-To-School Event
- Senior Briefing by Janice Hahn, member of U.S. Congress
- Tet Festival
- Calle Cuatro Fiestas Patrias
- Moon Festival

- Summer Lunch programs for farmworkers during lunch breaks (Cuadrilla de la Semana) through Radio Campesina
- Radio Campesina, First Annual Cesar Chavez Festival
- Utility Bill Outreach for persons with disabilities, sponsored through the Westside Center for Independent Living
- Utility Bill Outreach for Seniors, sponsored through Saint Barnabas Senior Services

Third-Party Outreach: In order to improve its efforts to communicate with hard-to-reach customers, SoCalGas has contracted with a vendor to perform door-to-door outreach. During PY2013, approximately 39,000 customers were enrolled by this method.

Community-Based Organizations (CBOs): In PY2013, SoCalGas enhanced its grassroots outreach efforts. The primary driver has been to establish relationships with faith-based and CBOs in order to enroll hard-to-reach customers. Due to challenges enrolling customers in Orange County, SoCalGas hired an agency to focus on grassroots outreach in that area. As a result, SoCalGas worked with Catholic Charities, Orange County, to assist in Outreach. For example, this organization hosts a monthly food pantry distribution and a monthly CalFresh Workshop where SoCalGas provided information on Customer Assistance Programs. SoCalGas also initiated a similar arrangement with St. Barnabas Senior Center in Los Angeles, an organization that works with low-income seniors in Los Angeles, and provided information on Customer Assistance Programs during these events.

Customer Assistance Programs and service information continue to be added to the growing California 211 information and referral network. 211 provides social and support services to assist those in need, mainly low-income residents. SoCalGas works very closely with 211 LA County, so that CARE is a key

component of the operator's assessment of the caller's needs. During PY2013, SoCalGas continued working with these organizations, but also added several key partners to expand awareness.

- In order to strengthen outreach with customers eligible for CalFresh, SoCalGas began working closely with FOOD Share, the regional food bank for Ventura County. FOOD Share conducts ongoing grassroots CalFresh program outreach and includes the CARE Program awareness as part of its efforts.
- SoCalGas also began working with Centro Latino for Literacy, an organization that provides language instruction in one of the poorest neighborhoods in Los Angeles where adult students learn about the CARE Program.
- SoCalGas also sponsors computer education events that are conducted by the Los Angeles Opportunities Industrialization Centers. These "computer boot camps" provide computers and computer education for low-income residents of Los Angeles at designated branches of the Los Angeles Public Library. CARE information is provided to all participants.
- Additionally, SoCalGas worked with St Vincent Meals on Wheels to provide CARE information to seniors who are homebound. Once a month, the organization includes CARE applications and/or general information with the daily meals.

Capitation Contractors: SoCalGas worked with 43 different CBOs and outreach agencies to enroll eligible non-participating customers in the CARE Program during PY2013. These "CARE Capitation Contractors" are located throughout the SoCalGas service area and employ various types of outreach strategies, such as local community event participation, walk-in enrollment, and program material distribution to enroll customers. By the fourth quarter of PY2013, 131

customers had enrolled in the CARE Program as a result of the combined outreach efforts of SoCalGas' CARE capitation contractors.

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

Mass media and grassroots partnerships maintain and enhance the awareness of the CARE Program. Direct mail was the single largest source of enrollments. One advantage of direct mail vis à vis mass media is that there is a specific source code on the returned application that allows CARE operations to identify enrollments from this method. The second largest source of enrollments was paper applications that customers requested from SoCalGas and then subsequently returned. Lastly, the third source of enrollments was door-to-door canvassing.

Although traditional, paper-based enrollment plays the greatest role in outreach, technology is playing a larger role in awareness and outreach. Digital components play a larger part of mass media campaigns, with social media sites such as the Facebook website generate significant "click-through's." Web enrollment and email-prompted Web enrollment are already significant contributors to participation. Thus, the current approach towards outreach and enrollment is to maintain traditional channels, fine tune the effectiveness of traditional channels, and continue to pursue technological approaches.

Ultimately, the pace of transition from more traditional methods will be governed by the preferences and behaviors of SoCalGas customers. SoCalGas continually cross promotes its Customer Assistance Programs and tailors outreach methods to meet individual customer needs, therefore, it is difficult to single out one outreach method as being the most effective or successful. For example, when a bill insert is scheduled, local print media was part of the reinforcement during PY2012. During PY2013, SoCalGas used print media along

with digital media to reinforce the bill insert. SoCalGas plans to continue to increase and enhance this strategy in PY2014. While this approach presents a challenge in measuring individual channel effectiveness, the overriding objective is to create awareness among SoCalGas' hard-to-reach customers.

Currently, a significant portion of low-income customers make use of the Internet. More than 10% of CARE enrollments are through the online application. When sending out "welcome" emails to new customers that are deemed likely to be eligible, SoCalGas has noticed that nearly half of those customers have provided an email address when signing up for service. One of the findings of a PY2013 telephone survey of CARE customers was that approximately one-third preferred a "digital" channel (website or email) when renewing their eligibility. In addition, mass media campaigns that use digital channels, such as Internet ads and social media placement (Please see section 2.4.1 above) have demonstrated significant click-rates. With these observations, the attention to digital outreach from PY2012 and PY2013 will continue into PY2014.

The primary outreach tactics used during PY2013 are listed below:

Automated Voice Messaging: For PY2013, SoCalGas used AVM for CARE recertification outreach. 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 over the telephone through the AVM system. For customers who are due to recertify, SoCalGas also sends an email if an address is on file.

Bill Inserts: SoCalGas sent out over 3 million CARE self-mailer bill inserts during July of PY2013. By the end of PY2013, almost 15,500 applications were processed, with approximately 8,600 approved. Although the bill insert is not

one of the top five sources of enrollment, they are a moderate cost, non-intrusive, high distribution outreach method for contacting potential CARE customers. The July bill insert is mandated because it publishes the revised eligibility guidelines. SoCalGas also coordinates the bill insert and the new eligibility guidelines with other forms of communication, such as local newspaper ads, social media, and digital advertising.

Capitation Program: See Section 2.4.1. above. As described there, SoCalGas worked with 43 different CBOs and outreach agencies to enroll eligible non-participating customers in the CARE Program during PY2013. CARE capitation contractors are located throughout the SoCalGas service area and employ various types of outreach strategies to enroll customers, such as local community event participation, walk-in enrollment and program material distribution. By the fourth quarter of PY2013, 131 customers had enrolled in the CARE Program as a result of the combined outreach efforts of SoCalGas' CARE capitation contractors.

Direct Mail: SoCalGas' efforts to target and reach relatively large numbers of eligible customers not currently enrolled in the CARE Program are often accomplished through the direct mailing of CARE applications, in which all of the letters and applications are in English and Spanish. These customers are selected based on an adjustable eligibility profile that shows them to live in high gap or high eligibility and low penetration areas. By the end of PY2013, 88,000 direct mail applications were returned, and 51,000 customers enrolled in CARE through direct mail. Late in PY2012, SoCalGas purchased demographic information from Nielsen Media Research. By using both Nielsen data and U.S. Census PRIZM data, SoCalGas is trying to develop higher quality lists for identifying customers who may have a likelihood of being eligible for the CARE rate.

Third Party Door-to-Door Outreach: Developed to perform 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. In PY2013, SoCalGas CARE enrollments from door-to-door contractors totaled approximately 47,000 returned applications, resulting in 39,000 enrollments.

Community-Based Organizations/Faith-Based Organizations:

SoCalGas has been increasing its collaboration with community-based and faith-based organizations. These organizations are crucial parts of our relationships to enhance awareness and trust among all customers, especially the hard-to-reach customers. The organizations that SoCalGas works with have a deep and ongoing relationship with their communities. For example, some CBOs include Radio Campesina among farmworkers, Saint Barnabas Senior Services and St Vincent Meals on Wheels among seniors, FOOD Share among CalFresh recipients in Ventura County, the Westside Center for Independent Living for persons with disabilities who are trying to live independently in homes or apartments, and Centro Latino for Literacy among non-literate residents in the Pico Union neighborhood of Los Angeles.

Web Based Outreach: Web based outreach consists of program promotion through e-newsletters, web links, e-mail blast campaigns, social media networks and direct internet access. In addition, CARE continues to be one of the most-visited pages and one of the most "searched" keywords on the SoCalGas website. A digital and social media channel have become basic component of mass media awareness campaigns. In PY2013, SoCalGas received 96,000 applications through the internet, and 52,000 were subsequently approved.

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

Although direct mail is an effective form of enrollment and will be the foundation of PY2014 efforts, it is challenging to optimize the direct mail campaigns. For example, postage continues to be the primary cost of a direct mail campaign, and these costs typically increase annually. Because of the success of past efforts, it is not possible to blanket a particular zip code or PRIZM code. As a result, more and more time is being devoted to using more databases (for example, the Nielsen data discussed above). In addition, considerations such as timing and sending mailings out during certain periods of the year, and complementary tactics which include timing direct mail pieces with mass awareness advertising and/or neighborhood canvassers, have now become part of direct mail campaigns. These efforts will be fine-tuned and will continue into PY2014.

During the recertification process, SoCalGas attempts to call the customer and remind the customer to recertify eligibility in the program. However, because the number of low-income customers who use a cellphone as a primary phone number continues to increase and federal law prohibits calling a cellphone through an AVM campaign, SoCalGas' ability to reach its CARE customers has decreased in PY2013.

Low-income customers exhibit a high degree of mobility. Although SoCalGas enrolled more than 300,000 new customers into the CARE Program during PY2013, slightly more than that number dropped out of the program. These drop off's were due to a variety of causes: closing gas service, no longer meeting eligibility, fail to respond to a PEV Request, or fail to recertify. The failure to recertify may be a due to customer negligence rather than change in circumstance. SoCalGas uses several tactics to inform the customer of the need

to recertify: phone when available (see the above comment on the restrictions on cell phones), emails when available, and direct mail. SoCalGas makes these efforts to avoid eligible customers dropping off the rate.

SoCalGas is working to make the enrollment process easier for customers. Based on phone surveys and feedback from community organizations, SoCalGas has learned that the actual process of filling out a form, is a barrier to many customers. This has lead SoCalGas to work with customers in small group settings and with trusted community organizations. More events were held towards the end of PY2013 and are planned for PY2014, where the focus of the event is the gas bill. By encouraging customers to bring their bills to community events, SoCalGas workers can talk to customers in a one-on-one environment. If the customer is already on the CARE Program, it is an opportunity to reinforce the need to recertify when requested. If the customer is not on the CARE program, it is an opportunity to sign up the customer at that location (e.g., many community centers have computers where online enrollment can be accommodated, and on several occasions, SoCalGas employees brought personal tablet computers to the event). SoCalGas will continue to fine tune its use of community organizations and community events into PY2014.

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.

SoCalGas continued to exchange electronically new CARE customer enrollment data on a weekly basis with SCE. In PY2013, SoCalGas received over 275,000 customer records from SCE, and enrolled 62,494 customers via the data exchange. Customers that were not enrolled were either already enrolled, not eligible, or not SoCalGas customers. In PY2013, SoCalGas and SDG&E exchanged a data file of the shared service territories in Southern Orange County. As a result of two data sharing efforts in May and November, 524 SDG&E CARE

participants were enrolled in SoCalGas CARE to receive the program discount on both energy provider services. Due to new PG&E customer information protection standards, PG&E postponed data sharing efforts with SoCalGas in PY2013. SoCalGas continues to share CARE customer data with Los Angeles Water and Power (LADWP) quarterly, but did not receive any customer data from LADWP's Low Income Discount Program for PY2013.

Joint Utility Program Manager's Meetings: SoCalGas, SCE, SDG&E, South West Gas and the Sacramento Municipal Utility District periodically met to informally discuss CARE outreach efforts and various program issues. Agenda items from the multiple PY2013 meetings included: rules of participation and enrollment forms, categorical program eligibility research, capitation PEV, high usage PEV, the Federal Communications Commission's ruling related to "robo calls," CHANGES program, outreach and operation best practices, AB 327, Needs Assessment Study, and the upcoming 2015 – 2017 Program Application.

2.4.5 Discuss how CARE customer data and other relevant program information is shared within the utility, for example, between its Energy Savings Assistance Program and other appropriate low-income programs.

Leveraging with other assistance programs is one of the most cost effective ways for SoCalGas to increase customer participation in the CARE Program. Therefore, customer information obtained from SoCalGas' ESA Program and GAF Programs, along with LIHEAP, is used for CARE enrollment, recertification, and verification purposes.

In PY2013, SoCalGas continued cross-referencing customers who receive ESA Program benefits. Customers who receive benefits from the ESA Program are automatically enrolled for the CARE discount and exempt from PEV if their

eligibility has been verified by the ESA Program. In PY2013, SoCalGas automatically enrolled 23,747 ESA Program customers in CARE.

SoCalGas' GAF Program provides a one-time bill assistance amount of up to \$100 on a qualified customer's winter natural gas bill. The annual, 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 May, or until available funds are depleted.

Because the GAF Program has the same income guidelines as 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. Additionally, because GAF customers provide proof of income when applying, customers approved for GAF are not subject to CARE's 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.

Through leveraging efforts with SoCalGas' GAF program, during PY2013, SoCalGas enrolled 1,161 new participants in CARE. Furthermore, in PY2009, SoCalGas requested CPUC authorization in Resolution E-4251 to utilize \$3 million in Ratepayer funds, on a one time only basis, to assist customers having financial difficulty. This request was approved in Advice Letter 4168 in December of PY2010. SoCalGas has utilized these funds over the last three years. Below is a report of the PY2013 distribution of those funds.

PY2013	Shareholder Funded Distributions	Ratepayer Funded Distributions
Beginning Balances	\$157,847	\$1,000,000
Customer & Shareholder Contributions	\$130,135	N/A
Total Funds Available	\$287,982	\$1,000,000
Administrative Fees	\$11,191	\$86,000
Gas Assistance Payments		\$881,603
Remaining Balance	\$276,791	\$32,396
Customers Assisted		10,482

Note: All customers receiving assistance are CARE eligible.

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 Outreach collaborates with the ESA Program at events. Outreach representatives are able to discuss multiple ways to save on energy bills such as the CARE discount, and weatherization and/or repairs for residences. In addition, SoCalGas often coordinates with SCE at events. Even though there are separate booths, the two utilities are positioned close to each other and the customer is able to focus on “utility bill” assistance. Outreach workers are able to assist in directing customers to each booth. The outreach events at the Westside Center for Independent Living were an example of this approach.

Additionally, CARE outreach also collaborates extensively with CalFresh program outreach. For efforts taken to reach and coordinate the CARE Program to eligible customers, outreach occurs at events such as at faith-based workshops (e.g., Catholic Charities Orange County) and with food banks (e.g., FOOD Share in Ventura County).

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).

For PY2013, SoCalGas did not receive low-income customer information or requests for the CARE discount information from CSD. However, SoCalGas received LIHEAP payment information from CSD, which was used to apply LIHEAP payment assistance to a low-income customer’s bill.

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. (By CARE)

SoCalGas continued the operation of the CARE Program using cost-effective and efficient channels. CARE applications submitted through the web improve efficiency and cost-effectiveness by saving postage, paper, and printing costs, and assist a wide range of customers since the applications are available in thirteen languages as well as large print font. Through on-line activities in PY2013, SoCalGas received over 100,000 customer applications from its website. SoCalGas will continue to promote and support CARE enrollment and recertification through the SoCalGas website.

SoCalGas processed over 500,000 mailed applications that were system generated, direct mail, and bill inserts in PY2013 through document scanning and data validations, with less than 20,000 requiring manual data entry.

SoCalGas continues to scan and electronically maintain all customer-returned documents for ease of processing and retrieval on its network as this improves program delivery when customers call with CARE inquiries and issues. The CARE call representative can easily retrieve the customer application and respond accordingly.

Pending Customer Accounts: In SoCalGas' Customer Information System (CIS), only active bill accounts can be approved for CARE, enrolling customers with an account in pending status cannot be approved. Pending accounts appear as *Inactive* when customers attempt to apply for CARE. Plans began to alter CIS to allow *pending* CARE applications on pending turn-on accounts in the last quarter of PY2013 and is scheduled to be completed in PY2014. The CARE application would be automatically processed once the pending new account becomes active, and a new CARE enrollment (or denial) would be processed in CIS. This new process will eliminate the need to solicit assistance from SoCalGas' Billing Department, which currently monitors these types of accounts. Furthermore, the new process will reduce manual intervention of two separate departments and expedite processing. SoCalGas strives to enroll all eligible applicants in a timely manner.

PEV-Terminated Customers: Previously PEV-terminated customers must submit proof of income or participation in a categorically eligible public assistance program to become re-enrolled. Customers are unable to reenroll in the program by completing a self-certification application for twenty-four months. In February, SoCalGas automated this process within its CIS billing system and customers now must submit documents proving their eligibility within twenty-four months from PEV termination to re-enroll. After twenty-four months, a customer can enroll with a self-certification application.

Bill Messages: Customers who do not respond to a PEV request receive a bill message reminding them to send their application and documents proving eligibility. To improve communication with its customers, SoCalGas recognized the need to create bill messages in Spanish as well as in English. During the last quarter of PY2013, plans for IT to implement this enhancement were scheduled for implementation in January of PY2014.

2.5 Processing CARE Applications

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

SoCalGas' process for recertifying sub-metered tenants of master-metered customers is the same as that of recertifying regular residential customers. CARE customers must recertify eligibility every two or four years for customers with fixed incomes, or are exempted by the Probability Model (i.e. customers found 85% or more likely to be CARE eligible). Recertification applications are mailed directly to the sub-metered tenants when they are due to recertify.

SoCalGas pre-populates each recertification form with the aim of reducing program attrition, including the name of the facility, the account number, tenant's facility ID number, tenant's name, address and space/apartment number. Several options for completing the recertification process are listed on the recertification form: call the toll-free AVM number, apply directly on the website at SoCalGas.com, mail back in the postage paid envelope, or directly fax to the CARE Customer Support Center. Recertification requires the tenant to provide the number of household occupants, annual income, or participation in a categorically eligible public assistance program. Tenants are allowed 90 days to respond to the recertification request. If the recertification is received after the 90 day time frame, the tenant is re-enrolled in CARE. Annually, each sub-metered facility is mailed a complete listing of its CARE tenants. Additionally, the

monthly *Add & Delete* report is mailed to each sub-metered facility notifying the facility of any tenants who were recently added to CARE or terminated from the program. This facilitates proper recordkeeping and appropriate billing at the 20% discount for each CARE tenant.

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, but processes and approves all CARE enrollment applications, recertification forms, and verification requests internally. Additionally, SoCalGas utilizes LIHEAP, the ESA Program, and GAF participant information to enroll, recertify, and verify CARE eligibility. SoCalGas also utilizes SDG&E and SCE CARE participant information to help enroll customers.

In PY2013, SoCalGas contracted with 43 CBOs and one third party outreach contractor to help eligible non-participating customers sign up for the CARE Program. The non-profit CARE Capitation CBOs employed a "one-stop-shop" approach by helping their clients complete a CARE application while also assisting customers in enrolling in other Customer Assistance Programs.

SoCalGas' third party CARE outreach contractor employed a variety of outreach strategies, such as door-to-door solicitation, local community event participation, and program material distribution to help customers apply for CARE. These approaches are taken because many of the customers targeted by the third party CARE contractor do not respond to traditional forms of outreach,

nor visit CBO facilities, and have been more receptive to door-to-door canvassing efforts.

During PY2013, the number of customers enrolled in CARE by SoCalGas' Capitation CBOs was 131 with over 39,278 new enrollments derived from CARE's third party contractor's efforts.

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 did not experience any serious issues or events that significantly affected program management during PY2013.

AB327 Implementation

In October of PY2013 the California Legislature approved AB 327, which revised Section 739.1 (a) of the Public Utilities (PU) Code to require that the CARE income-eligibility guideline level for one-person households be based on the two-person household guideline level. SoCalGas updated the CIS system, website (in 5 languages), and all CARE applications (almost 40 forms), and multi-language collateral to the new guidelines; and filed and received approval to use updated forms for implementation on January 1, 2014.

Long-Term Post Enrollment Verification Probability Model

D.12-08-044, Ordering Paragraph 89 directed utilities to begin an immediate development of an interim targeted Post Enrollment and Post Re-certification Income Verification stratified probability model by incorporating certain factors, as appropriate, to ensure the integrity of the CARE Program and the discount is received only by those lawfully intended to receive it. The nine basic factors included:

- High energy use (including customers with usage above 400% baseline in any monthly billing cycle and above)
- Annual bill amounts
- Household size
- PRIZM or ZIP code
- Enrollment method
- Previously indicated customer ineligibility
- Customers previously de-enrolled from the CARE Program
- Length of program enrollment
- Length of time lapse since previously income verification

Following development of the interim model, SoCalGas submitted its proposed long-term probability model for approval on September 3, 2013, and received approval on November 20, 2013. The long-term solution incorporates mandated factors and considers additional factors such as payments, other low income programs, as well as other variables (i.e., single family home, fixed income, medical qualified) that increase model integrity and represent a more well-rounded profile of a CARE customer. In the second and third quarter of PY2013, SoCalGas tested the interim PEV model and gathered insights for the September Advice Letter filing. SoCalGas has implemented the approved long-term model and IT is underway to automate running the model in CIS, anticipated by Spring of PY2014. In the meantime, CARE administration is manually issuing post-enrollment verification applications to customers who do not pass the model.

Post Enrollment and Post re-certification Verification Results per D. 12-08-044,

OP #94

D.12-08-044 directed IOUs to report the post enrollment and post re-certification verification results in their annual reports.

In PY2013, 59,513 customers were mailed a PEV request. Of the customers which SoCalGas sent verification requests, 23,332 were successfully verified based on documents provided, and 36,181 were de-enrolled because they were verified as ineligible or did not respond to the verification request. As a result, 33,239 customers were de-enrolled due to non-response, 1,632 deemed ineligible, and 1,310 were de-enrolled per customer's request. For reference please see CARE Table 3 in the attachments for the monthly statistics.

Of the 23,332 customers successfully verified based on documents received, approximately 44% were income eligible, 45% were categorically eligible, and 10% were enrolled via automatic enrollment. For customers successfully verified in their initial enrollment in the CARE Program, 44% received CARE applications from SoCalGas after new gas service establishment, payment arrangement, and customer request. For the remainder, 21% were automatic enrollments, 15% responded to CARE campaigns, 13% were web enrollments, 1% were from CBOs and door-to-door outreach, and 6% were from other sources such as rate transfer. Of the 36,181 customers who failed the verification, approximately 38% were income eligible, 31% were categorically eligible, and 30% were enrolled via automatic enrollment.

For those de-enrolled and ineligible customers, regarding customers' initial enrollment in the CARE Program, 27% received CARE applications from SoCalGas after new gas service establishment, payment arrangement, and customer request. For the remainder, 30% were automatic enrollments, 19% responded to CARE campaigns, 12% were web enrollments, 4% were from CBOs and door-to-door outreach, and 8% were from other sources.

SoCalGas' PEV practice was based on SoCalGas' long-term probability model that was approved by CPUC Energy Division in November of PY2013. Customers who are found ineligible or do not provide required proof are removed from CARE.

2.7 Pilots

2.7.1 CHANGES Pilot Program

In D.12-12-011 (CHANGES Decision), the Commission approved the continued funding for the CHANGES³⁹ Pilot Program through the CARE Program budget for the remainder of the 2012-2014 program cycle or until alternate or complementary funding can be put into place, whichever is sooner. The CHANGES Decision also directed the utilities to work with the Commission's Consumer Service and Information Division (CSID), the Pilot Program's contractor, and community-based organizations, as necessary, to:

- Develop pilot program success criteria, and
- Facilitate and improve the tracking, monitoring and oversight of the CHANGES Pilot Program efforts

These efforts were directed to be done consistent with the directives provided in the CHANGES Decision and D.12-08-44. The overall objectives of the collaborative efforts are to: 1) identify and eliminate unnecessarily duplicative efforts between the CARE Program's marketing, education and outreach activities and the CHANGES Pilot Program's activities; 2) improve the utilities marketing, outreach and education activities, where appropriate; and, 3) ensure

³⁹ On November 19, 2010, the Commission approved Resolution CSID-004 and approved the CHANGES Pilot Program and authorized CARE funding for the one-year Pilot Program. On November 10, 2011, the Commission issued Resolution CSID-005 which authorized continued CARE funding for the CHANGES Pilot Program. CSID did not authorize funding for the Pilot beyond December 31, 2012.

effectiveness of the CHANGES activities, relating to the CARE Program, in furthering the CARE Program objectives.

Pacific Gas and Electric Company, San Diego Gas & Electric Company, Southern California Edison and Southern California Gas Company (Joint Utilities), CHANGES contractors and CSID, reached agreement on the pilot program tracking and reporting of data required in D.12-12-011, OP 3(b). The Joint Utilities received year-to-date data through June of PY2013 from the CHANGES contractor by August 10, 2013. The initial data was included in additional CARE tables within the Joint Utilities' Low Income Assistance Programs Monthly Reports that were filed with the CPUC on August 21, 2013. Information was updated on a monthly basis and included in the reports due on the 21st of each month. All parties continue to discuss revised formatting to further improve the monthly reports that are presently provided to the Joint Utilities by the CHANGES contractors.

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.

There were 25,735 residents in the non-residential CARE Expansion Program facilities and 497 primary facilities with 839 associated satellites participating in the CARE Expansion Program at PY2013 year-end.

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.*)

In PY2013, SoCalGas sent a bill insert to 291,000 business accounts for the CARE Expansion Program bill insert and incurred \$4,684 in outreach expenses (printing and design cost). Since the volume of CARE expansion applications received is extremely small compared to the volume of regular CARE applications received, SoCalGas did not track administrative labor costs for new CARE expansion applications received during PY2013.

3.3.1.1 Discount Information.

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

The average annual discount received per participating CARE residential facility in PY2013 was \$73.40.⁴⁰

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

The average annual discount received per participating CARE Expansion Program commercial facility in PY2013 was \$446.18.⁴¹

⁴⁰ Average annual discount is dependent on the sales and transport gas revenue as well as the number of CARE customers by climate zone.

⁴¹ Average annual discount is dependent on the sales and transport gas revenue as well as the number of CARE customers by climate zone.

3.4 Outreach

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

Annually, SoCalGas sends a bill insert to commercial customers informing them of the Non-Profit Group Living Rate. In addition, SoCalGas worked with its Public Affairs personnel in rural counties to promote program awareness for low-income farm workers. To enhance outreach in rural counties, SoCalGas continues to work with Radio Campesina in Visalia and Bakersfield to reach farm workers. During PY2013, Radio Campesina provided an opportunity for SoCalGas to participate in events, such as Cuadrilla De La Semana, which are weekly visits to farmworkers in their workplaces. Lunch, musical entertainment, and information from SoCalGas regarding the CARE Program are part of the lunch breaks. SoCalGas also advertises the CARE Program with 30 second, Spanish language radio spots, and participates in Spanish-language interview shows. SoCalGas plans to continue and increase this relationship.

3.4.2 Discuss each of the following: the expansion program outreach

SoCalGas used a variety of channels to increase awareness of the CARE Program among agricultural workers and those living in commercial facilities. During September, SoCalGas mailed approximately 300,000 bill inserts to commercial facilities (non-profit group living facilities and migrant worker housing). In past years, SoCalGas has leveraged the relationships of its Public Affairs personnel in developing grassroots relationships with agricultural and migrant workers. During PY2013, SoCalGas strengthened these relationships by working more closely with Radio Campesina, which has Spanish language radio stations in both Visalia and Bakersfield. SoCalGas now runs 30 second ads on both stations on a daily basis throughout the day. During October, SoCalGas participated in several extended on-air interviews with Radio Campesina to answer questions on Customer Assistance Programs. SoCalGas has been increasing its relationship

with Radio Campesina during the last several years, and has planned further expansion in PY2014.

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

Presently, SoCalGas receives no data or feedback that informs a most effective method or tactic, so SoCalGas is not yet ready to rank or comment upon the comparative effectiveness of particular channels. Because hard-to-reach customers have challenges with language and/or comfort with institutions, SoCalGas is continuing to develop relationships with grassroots community organizations. Such organizations are SoCalGas' primary partner in developing strong awareness and trust of low-income programs. In Tulare and Kings counties, SoCalGas' works closely with Radio Campesina and its affiliates. In order to reach farmworkers in Ventura county, SoCalGas began a partnership with FOOD Share in PY2013. FOOD Share uses CalFresh outreach as a way of creating awareness for the CARE Program, but the organization also works closely with the migrant farmworker community. In addition, the CCC continued to be an 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 questions. Social service networks continue to be another valuable communication medium to promote CARE Program information to CARE expansion customers.

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 facility data shared during PY2013.

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 did not experience any barriers to participation in PY2013 requiring adjustments in PY2014. CARE applications were processed the same day they were received. Incomplete applications were followed-up with correspondence to the customer, resulting in CARE approval of qualified accounts.

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.

SoCalGas considers the current processing of CARE Expansion Program applications to be cost-effective. Applications are processed the same day they are received. The majority of applicants include the necessary qualifying documentation and no further follow-up is needed.

Occasionally, a follow-up phone call is necessary. SoCalGas recertifies these accounts every two years. Correspondence containing a recertification application, instruction letter, and postage paid envelope is mailed to the facilities due to recertify. The facilities are familiar with this routine and submit what is asked of them. Additionally, the CCC and Billing Department notifies the CARE Department of new Expansion Program accounts, including both non-profit

and agricultural group living facilities. A CARE application is proactively mailed to these accounts.

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.

SoCalGas' CARE Program did not experience any issues or events that significantly affected program management during PY2013.

4. FUND SHIFTING

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

See ESA Table 12.

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

See CARE Table 1.

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

All fund shifting activity performed in 2013 is in compliance with fund shifting rules as laid out in D. 12-08-044.

5. COMMONLY USED ACRONYMS

AB	Assembly Bill
AVM	Automated Voice Messaging
CARE	California Alternate Rates for Energy
CBO	Community Based Organization
CHANGES	Community Help and Awareness with Natural Gas and Electricity Services
CCC	Customer Contact Center
CIS	Customer Information System
CFL	Compact Fluorescent Lamp
CSR	Customer Service Representatives
CSD	California Services Department
CPUC	California Public Utilities Commission
D.	Decision
EE	Energy Efficiency
ESA	Energy Savings Assistance
FPL	Federal Poverty Level
GAF	Gas Assistance Fund
HE	High Efficiency
HEAT	Home Energy Assistance Tracking
HECW	High Efficiency Clothes Washers
HUP	Home Upgrade Program
HVAC	Heating, Ventilation, and Air Conditioning
IDSM	Integrated Demand Side Management
IVR	Integrated Voice Recognition
IOUs	Investor Owned Utilities
LIEE	Low Income Energy Efficiency
LIHEAP	Low-Income Energy Efficiency Program
LEP	Limited English Proficiency
MIDI	Middle Income Direct Install
MF	Multifamily
NGAT	Natural Gas Appliance Testing
OP	Ordering Paragraph
PU	Public Utilities
PFM	Petition for Modification
P&P Manual	Policy and Procedures Manual
PEV	Post Enrollment Verification
SCE	Southern California Edison
SoCalGas	Southern California Gas Company
SEC	Service Establishment Charge
SWH	Solar Water Heater
WE&T	Workforce Education and Training
WNA	Whole Neighborhood Approach

6. APPENDIX:

6.1. Energy Savings Assistance Program Tables

2013 Summary Highlights - Energy Savings Assistance Program and CARE Program

Energy Savings Assistance Program- Table 1- Overall Program Expenses

Energy Savings Assistance Program- Table 2- Expenses & Energy Savings by Measures Installed

Energy Savings Assistance Program- Table 3- Cost Effectiveness

Energy Savings Assistance Program- Table 4- Penetration

Energy Savings Assistance Program- Table 5- Direct Purchases & Installation Contractors

Energy Savings Assistance Program- Table 6- Installation Cost of Program Installation Contractors

Energy Savings Assistance Program- Table 7- Expenditures by Cost Elements

Energy Savings Assistance Program- Table 8- Homes Unwilling/Unable to Participate

Energy Savings Assistance Program- Table 9- Life Cycle Bill Savings by Measure

Energy Savings Assistance Program- Table 10- Energy Rate Used for Bill Savings Calculations

Energy Savings Assistance Program- Table 11- Bill Savings Calculations by Program Year

Energy Savings Assistance Program- Table 12- Fund Shifting

Energy Savings Assistance Program- Table 13- Categorical Enrollment

Energy Savings Assistance Program- Table 14- Leveraging

Energy Savings Assistance Program- Table 15- Lighting

Energy Savings Assistance Program- Table 16- "Add back" measures

6.2. CARE Tables

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 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

**Energy Savings Assistance Program and CARE Program
SOUTHERN CALIFORNIA GAS COMPANY
2013 Summary Highlights**

ESA Program

2013 Energy Savings Assistance Program Summary

2013	Authorized / Planning Assumptions	Actual	%
Budget	\$ 117,559,855.00	\$ 97,554,614.21	83%
Homes Treated	136,836.00	106,948.00	78%
kWh Saved	N/A	N/A	N/A
kW Demand Reduced	N/A	N/A	N/A
Therms Saved	2,417,480.00	3,096,500.12	128%

CARE Program

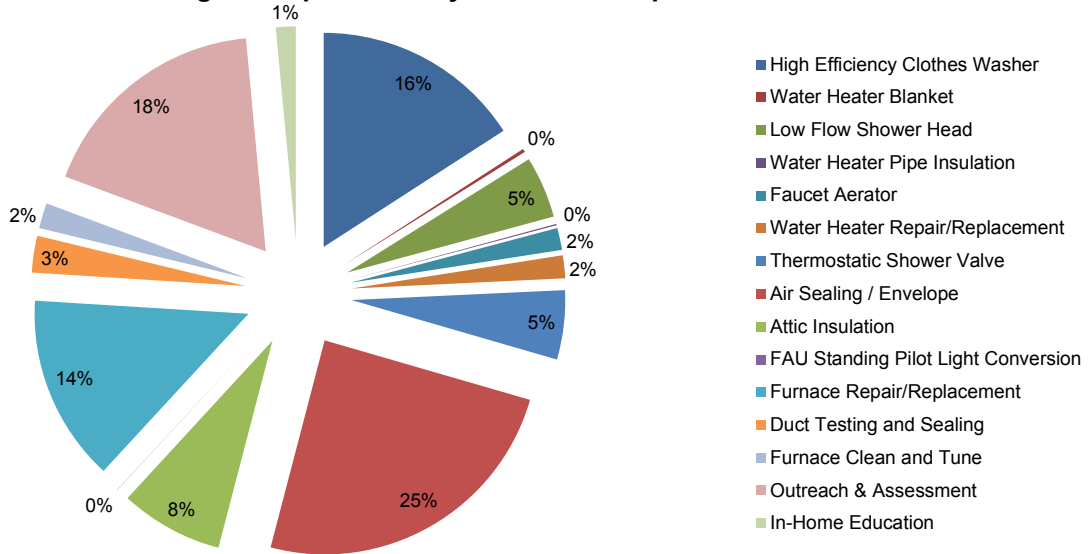
2013 CARE Summary

2013	Authorized Budget	Actual	%
Administrative Expenses	\$ 16,157,426.00	\$ 6,899,171.00	43%
Subsidies	\$ 125,656,804.70	\$ 115,515,260.00	92%
Service Establishment Charge	\$ 4,236,035.30	\$ 3,041,445.00	72%
Total Program Costs and Discounts	\$ 146,050,266.00	\$ 125,455,876.00	86%

2013 CARE New Enrollments	Automatically Enrolled via Data Sharing, ESA Participation, etc	Self Certified as Categorically Eligible	Self Certified as Income Eligible
Method	104,444	142,456	80,131
2013 CARE Penetration	Estimated Eligible Participants	Participants	Penetration Rate
Total Enrolled ¹	1,798,002	1,604,411	89%

¹ December 2013 results from the SoCalGas Monthly Report.

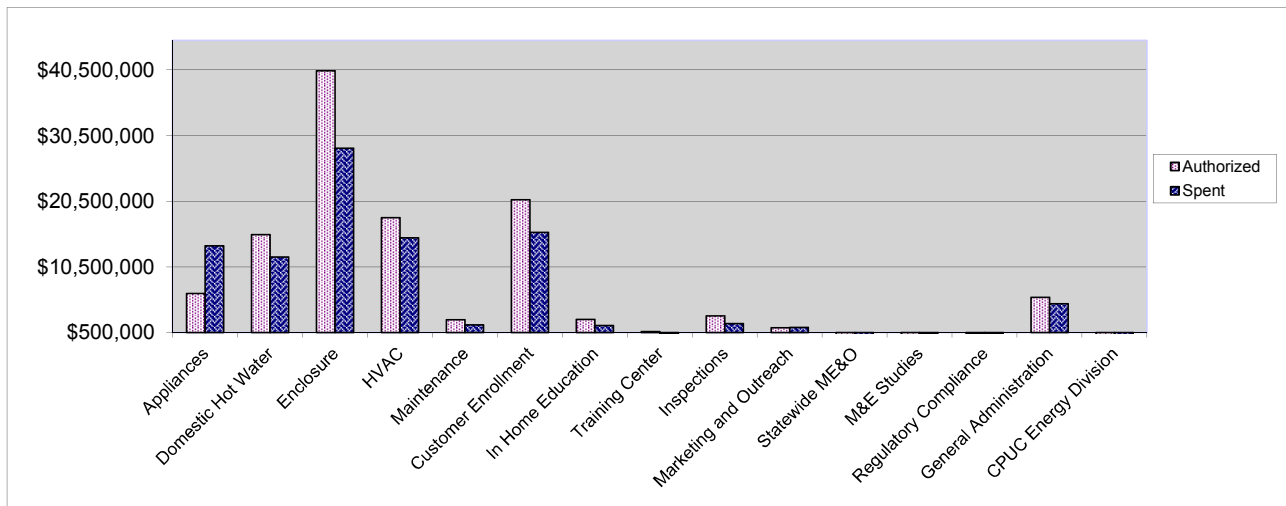
ESA Program Expenditure by Measure Group



	A	B	C	D	E	F	G	H	I	J
	PY 2013 Energy Savings Assistance Program Annual Report									
	ESA Program Table 1									
	ESA Program Overall Program Expenses									
	SOUTHERN CALIFORNIA GAS COMPANY									
1										
2		2013 Authorized Budget ¹			2013 Annual Expenses			% of Budget Spent YTD		
3	ESA Program:	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
4	Energy Efficiency									
5	Appliances ²		\$ 6,449,788	\$ 6,449,788		\$ 13,740,908	\$ 13,740,908		213%	213%
6	Domestic Hot Water		\$ 15,460,812	\$ 15,460,812		\$ 12,033,576	\$ 12,033,576		78%	78%
7	Enclosure		\$ 40,418,299	\$ 40,418,299		\$ 28,578,903	\$ 28,578,903		71%	71%
8	HVAC		\$ 18,006,083	\$ 18,006,083		\$ 14,934,840	\$ 14,934,840		83%	83%
9	Maintenance		\$ 2,496,293	\$ 2,496,293		\$ 1,697,268	\$ 1,697,268		68%	68%
10	Lighting		\$ -	\$ -		\$ -	\$ -			
11	Miscellaneous		\$ -	\$ -		\$ -	\$ -			
12	Customer Enrollment		\$ 20,746,914	\$ 20,746,914		\$ 15,800,281	\$ 15,800,281		76%	76%
13	In Home Education		\$ 2,517,638	\$ 2,517,638		\$ 1,586,948	\$ 1,586,948		63%	63%
14	Pilot		\$ -	\$ -		\$ -	\$ -			
15	Energy Efficiency TOTAL		\$ 106,095,827	\$ 106,095,827		\$ 88,372,724	\$ 88,372,724		83%	83%
16										
17	Training Center		\$ 663,921	\$ 663,921		\$ 292,165	\$ 292,165		44%	44%
18	Inspections		\$ 3,063,896	\$ 3,063,896		\$ 1,909,890	\$ 1,909,890		62%	62%
19	Marketing and Outreach ²		\$ 1,272,007	\$ 1,272,007		\$ 1,310,142	\$ 1,310,142		103%	103%
20	Statewide Marketing Education and Outreach		\$ 100,000	\$ 100,000		\$ -	\$ -		0%	0%
21	Measurement and Evaluation Studies ²		\$ 91,667	\$ 91,667		\$ 459,866	\$ 459,866		502%	502%
22	Regulatory Compliance		\$ 295,333	\$ 295,333		\$ 290,849	\$ 290,849		98%	98%
23	General Administration		\$ 5,891,204	\$ 5,891,204		\$ 4,911,594	\$ 4,911,594		83%	83%
24	CPUC Energy Division		\$ 86,000	\$ 86,000		\$ 7,384	\$ 7,384		9%	9%
25										
26	TOTAL PROGRAM COSTS		\$ 117,559,855	\$ 117,559,855		\$ 97,554,614	\$ 97,554,614		83%	83%
27	ded Outside of ESA Program Budget									
28	Indirect Costs					\$ 3,080,191	\$ 3,080,191			
29	NGAT Costs					\$ 2,368,284	\$ 2,368,284			

¹ Budget reflects PY 2013 budget authorized in D.12-08-044 of \$117,559,855 and does not reflect any fund shifting amounts from prior or future years.
² Funds shifted to PY 2013 in Appliances, Marketing and Outreach, and M&E Studies from PY 2012 unspent funds. (See ESA Program Table 12 - Fund Shifting).

Bar Chart 1 - Total Spent vs. Authorized by Category



	A	B	C	D	E	F	G	H
1	PY 2013 Energy Savings Assistance Program Annual Report							
2	ESA Program Table 2							
3	ESA Program Expenses and Energy Savings by Measures Installed							
4	SOUTHERN CALIFORNIA GAS COMPANY							
5			PY Completed & Expensed Installations					
6	Measures	Units	Quantity Installed	kWh (Annual)	kW (Annual)	Therms¹ (Annual)	Expenses (\$) ²	% of Expenditure
7	Appliances							
8	High Efficiency Clothes Washer	Each	18,537			506,060	\$ 14,005,944	15.86%
9	Refrigerators	Each						
10	Microwaves	Each						
11	Domestic Hot Water							
12	Water Heater Blanket	Home	4,545			21,398	\$ 234,420	0.27%
13	Low Flow Shower Head	Home	99,650			441,258	\$ 4,106,593	4.65%
14	Water Heater Pipe Insulation	Home	3,877			11,977	\$ 79,680	0.09%
15	Faucet Aerator	Home	97,535			141,086	\$ 1,461,248	1.65%
16	Water Heater Repair/Replacement	Each	1,804			-	\$ 1,523,409	1.73%
17	Thermostatic Shower Valve	Each	113,876			1,548,714	\$ 4,628,225	5.24%
18	Enclosure							
19	Air Sealing / Envelope	Home	86,834			311,699	\$ 21,707,276	24.58%
20	Attic Insulation	Home	6,493			48,180	\$ 6,871,627	7.78%
21	HVAC							
22	FAU Standing Pilot Light Conversion	Each	54			2,268	\$ 16,042	0.02%
23	Furnace Repair/Replacement	Each	11,575			-	\$ 12,466,513	14.12%
24	Room A/C Replacement	Each						
25	Central A/C Replacement	Each						
26	Heat Pump Replacement	Each						
27	Evaporative Coolers (Replacement)	Each						
28	Evaporative Coolers (Installation)	Each						
29	Duct Testing and Sealing	Home	2,432			-	\$ 2,452,286	2.78%
30	Maintenance							
31	Furnace Clean and Tune	Home	26,750			63,860	\$ 1,697,268	1.92%
32	Central A/C Tune-up	Home						
33	Evaporative Cooler Maintenance	Home						
34	Lighting							
35	Compact Fluorescent Lights (CFLs)	Each						
36	Interior Hard wired CFL fixtures	Each						
37	Exterior Hard wired CFL fixtures	Each						
38	Torchiere	Each						
39	Occupancy Sensor	Each						
40	LED Night Lights	Each						
41	Miscellaneous							
42	Pool Pumps	Each						
43	Smart Power Strips	Each						
44	Pilots							
45		Each						
46		Each						
47	Customer Enrollment							
48	Outreach & Assessment	Home	106,948			-	\$ 15,742,759	17.83%
49	In-Home Education	Home	107,465			-	\$ 1,310,730	1.48%
50								
51	Total Savings					3,096,500	\$ 88,304,021	100.00%
52								
53	Homes Weatherized	Home	107,202					
54								
55	Homes Treated							
56	- Single Family Homes Treated	Home	80,180					
57	- Multi-family Homes Treated	Home	22,072					
58	- Mobile Homes Treated	Home	4,696					
59	- Total Number of Homes Treated	Home	106,948					
60	# Eligible Homes to be Treated in 2013	Home	136,836					
61	% OF Homes Treated	%	78.16%					
62	- Total Master-Metered Homes Treated	Home	8,741					
63	¹ All savings are calculated based on the following sources: ECONorthwest. "Impact Evaluation of the 2009 CA Low Income Energy Efficiency Program, Final Report." June 16, 2011.							
64	² The Total Savings/Expenditures amount does not include credits, expenses, or required adjustments for this period in various IO's. Additionally, the PY 2013 expenses amount includes \$10,812 paid in lead fees to the contractors for potential customers who were unwilling or unable to participate in the program.							

	A	B	C	D	E	F	G
1	PY 2013 Energy Savings Assistance Program Annual Report ESA Program Table 3 ESA Program Cost-Effectiveness SOUTHERN CALIFORNIA GAS COMPANY						
2	PY - Recorded ¹						
3	Ratio of Benefits Over Costs			Net Benefits; \$ Millions			
4	Program Year	Utility Cost Test	Total Resource Cost Test	Modified Participant Test	Utility Cost Test	Total Resource Cost Test	Modified Participant Test
5	2013	0.36	0.24	0.51	\$ (61,706,799)	\$ (72,745,311)	\$ (48,273,402)
6	2012	0.31	0.20	0.52	(55,914,989)	(64,445,167)	(39,917,606)
7	2011	0.27	0.18	0.73	(75,116,741)	(84,544,284)	(28,941,324)
8	2010	0.27	0.18	0.70	(56,410,628)	(63,936,482)	(24,097,023)
9	2009	0.31	0.21	0.67	(33,134,007)	(37,833,117)	(16,208,219)
10	2008	0.28	0.20	0.71	(26,904,944)	(30,069,392)	(10,909,048)
11	2007	0.28	0.20	0.68	(20,985,301)	(23,315,525)	(9,541,175)
12	2006	0.23	0.20	0.90	(21,852,544)	(21,456,113)	(2,798,151)
13	2005	0.20	0.24	0.54	(23,160,759)	(22,005,772)	(13,294,877)
14	2004	0.20	0.19	0.53	(26,138,097)	(26,305,744)	(15,353,305)
15	2003	0.29	0.30	0.63	(24,125,171)	(23,844,044)	(12,519,637)
16	¹ 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 PY 2003 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 calculator for energy efficiency cost effectiveness testing. The Total Resource Test (TRC) was calculated using the E3 calculator. The TRC does not include NEBs.						
17							
18							

	A	B	C	D	E	F	G
1	PY 2013 Energy Savings Assistance Program Annual Report ESA Program Table 4 Detail by Housing Type and Source SOUTHERN CALIFORNIA GAS COMPANY						

2	2013 Energy Savings						
3	Customer	Housing Type	# Homes Treated	(mWh)	MW	(Mth*)	2013 Expenses¹
4	Gas and Electric Customers						
5	Owners - Total						
6		Single Family					
7		Multi Family					
8		Mobile Homes					
9	Renters - Total						
10		Single Family					
11		Multi Family					
12		Mobile Homes					
13	Electric Customers (only)						
14	Owners - Total						
15		Single Family					
16		Multi Family					
17		Mobile Homes					
18	Renters - Total						
19		Single Family					
20		Multi Family					
21		Mobile Homes					
22	Gas Customers (only)						
23	Owners - Total						
24		Single Family	57,845			2,039,493	\$ 60,456,853
25		Multi Family	53,243			1,915,223	\$ 57,080,975
26		Mobile Homes	616			11,000	\$ 306,324
27	Renters - Total						
28		Single Family	3,986			113,270	\$ 3,069,553
29		Multi Family	49,103			1,057,007	\$ 27,836,356
30		Mobile Homes	26,937			803,645	\$ 19,311,457
31		Multi Family	21,456			235,208	\$ 8,135,132
32		Mobile Homes	710			18,154	\$ 389,767
33	Totals:						
34			106,948			3,096,500	\$ 88,293,209

34 * Thousands of Therms

35 ¹ The Total Savings/Expenditures amount does not include credits, expenses, or required adjustments for this period in various IO's. Additionally, the PY 2013 expenses amount does not include \$10,812 paid in lead fees to the contractors for potential customers who were unwilling or unable to participate in the program.

37	Penetration History				
38	Year	Homes Treated¹	Ineligible & Unwilling²	Estimated Eligible in Current Year³	Current Year Penetration Rate for Homes Treated
39	2002	49,464			
40	2003	57,179			
41	2004	54,677			
42	2005	40,523			
43	2006	36,870			
44	2007	44,048			
45	2008	58,773			
46	2009	83,493	3,562		
47	2010	120,358	22,589		
48	2011	161,020	23,765		
49	2012	96,893	20,383	136,836	70.81%
50	2013	106,948	12,310	136,836	78.16%
51	2014				
52	2015				
53	2016				
54	2017				
55	2018				
56	2019				
57	2020				
58	Total Homes Treated since 2002	910,246	82,609		

60 ¹ Homes treated since 2002 are reported to track progress toward meeting the 2020 Programmatic Initiative.

61 ² Ineligible & Unwilling - Leads which do not result in a customer enrollment based on one of the following reasons: customer refused; home does not meet minimum measure

62 ³ Based on Attachment F of D.12-08-044.

65	Year	Utility in Shared Service Territory	Eligible Households in Shared Service Territory	Eligible households treated by both utilities in shared service territory
66	2013	SDG&E	17,506	20
67	2013	PG&E	101,710	3,222
68	2013	SCE	1,214,480	19,637

	A	B	C	D	E	F	G
1	PY 2013 Energy Savings Assistance Program Annual Report ESA Program Table 5 ESA Program Direct Purchases & Installation Contractors SOUTHERN CALIFORNIA GAS COMPANY						
2	Contractor	County¹	Contractor Type (Check one or more if applicable)				2013 Annual Expenditures²
3			Private	CBO	WMDVBE	LIHEAP	
4	ADVANCED CONTRACTING SERVICES INC	Ke	x				\$ 334,044
5	AMERICAN ECO SERVICES INC	SD			x		\$ 1,046,948
6	AMERICAN INSULATION INC	R, I	x		x		\$ 1,442,696
7	APPLIANCE RECYCLING CENTERS OF AMERICA	LA	x				\$ 13,883,324
8	ASSERT INC	LA, Ke		x			\$ 551,920
9	ASSOCIATED CONSTRUCTION SERVICES	LA			x		\$ 715,535
10	AVALON CARVER COMMUNITY CENTER INC	LA		x			\$ 498,557
11	B&W FURNACE SERVICE INC	LA					\$ 33,570
12	CAMPESINOS UNIDOS INC	R, I		x	x	x	\$ 497,003
13	COMMUNITY ACTION COMMISSION (SANTA BARBARA COUNTY)	Sba		x		x	\$ 89,906
14	COMMUNITY ACTION OF VENTURA COUNTY	V, LA		x		x	\$ 280,344
15	COMMUNITY ACTION PARTNERSHIP (OF SAN BERNADINO COUNTY)	Sbe		x	x	x	\$ 485,098
16	COMMUNITY ACTION PARTNERSHIP OF (SAN LUIS OBISPO)	SLO,		x	x	x	\$ 521,312
17	COMMUNITY ACTION PARTNERSHIP OF O C	OC		x	x	x	\$ 122,036
18	COMMUNITY ACTION PARTNERSHIP OF RIVERSIDE	R		x		x	\$ 39,434
19	COMMUNITY ENHANCEMENT SERVICES	LA		x		x	\$ 268,219
20	EAGLE SYSTEMS INTERNATIONAL INC	LA, R, T, Ki	x				\$ 5,491,454
21	EAST LOS ANGELES COMMUNITY UNION	LA, R, OC		x	x		\$ 13,421,766
22	EAST SAN GABRIEL VALLEY CONSORTIUM	LA		x			\$ 323,307
23	ECONO WEST INC	LA, Ke	x		x		\$ 770,887
24	ENERGY SERVICES & TECHNOLOGIES INC	LA, OC, R, SBN	x		x		\$ 164,066
25	ENVIRONMENTAL ASSESSMENT SERVICES	LA, R, Sbe	x		x		\$ 762,990
26	FCI MANAGEMENT CONSULTANTS	LA, OC, SD	x		x		\$ 63,879
27	GARCIA & SONS HOME IMPROVEMENT	Ke	x		x		\$ 547,406
28	HARRISON AIR CONDITIONING	R, SBe			x		
29	HIGHLANDS ENERGY SERVICES INC	T, Ki, F	x		x		\$ 4,000,085
30	JOHN HARRISON CONTRACTING INC	R			x		\$ 208,341
31	LONG BEACH COMMUNITY	LA		x	x	x	\$ 7,636
32	MARAVILLA FOUNDATION	LA		x	x	x	\$ 13,756,399
33	OASIS AIR CONDITIONING	Ke	x				\$ 7,462
34	PACIFIC ASIAN CONSORTIUM IN	ALL		x	x	x	\$ 603,048
35	PACIFIC COAST ENERGY CONSERVATION	Ke	x				\$ 245,405
36	PROTEUS INC	T		x			\$ 4,877,084
37	QUALITY CONSERVATION SERVICES INC	LA	x				\$ 3,146,796
38	RELIABLE ENERGY MANAGEMENT INC	LA	x		x		\$ 5,078,028
39	RICHARD HEATH & ASSOCIATES INC	ALL	x		x		\$ 1,040,898
40	SIERRA WEATHERIZATION COMPANY INC	LA	x				\$ 6,300,423
41	SOCO AIR CONDITIONING CO	R, Sbe	x				\$ 152,535
42	STAPLES & ASSOC	T, Ki, F	x				\$ 812,670
43	SOUTHEAST COMMUNITY DEVELOPMENT	LA					
44	SYNERGY MECHANICAL AIR CONDITIONING	SBE, LA, R, SFERN	x		x		\$ 900,849
45	TONY'S HEATING & A/C SERVICE INC.	LA, OC			x	x	\$ 939,722
46	TRI-STATE HOME IMPROVEMENTS INC	R	x		x		\$ 101,636
47	VETERANS IN COMMUNITY SERVICES INC	LA		x	x		\$ 1,599,323
48	WATTS LABOR COMMUNITY ACTION COMM	LA		x	x		\$ 219,084
49	WESTERN INSULATION LP	LA, R, Sbe	x				\$ 3,860,847
50	Total Contractor Expenditures						\$ 90,213,969
51							
52	¹ Key						
53	Los Angeles	LA					
54	Orange County	OC					
55	Ventura	V					
56	San Bernadino	Sbe					
57	Riverside	R					
58	Imperial	I					
59	Tulare	T					
60	Kings	Ki					
61	Kern	Ke					
62	Santa Barbara	Sba					
63	San Luis Obispo	SLO					
64	Fresno	F					
65	San Diego	SD					
66	San Fernando	SFERN					
67	² The expenditures do not include a credit of (\$264,288) for the high efficiency clothes washer rebates from (Eastern Municipal Water District and Park						
68	Water Co), and Journal Entry correction for (\$807). \$90,213,969 - \$264,288 - \$807 = \$89,948,874. (See ESAP Table - 7 Contract).						

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
1	PY 2013 Energy Savings Assistance Program Annual Report ESA Program Table 6 ESA Program Installation Cost of Program Installation Contractors SOUTHERN CALIFORNIA GAS COMPANY																		
2		Unit of Measure	CBO/WMDVBE						Non-CBO/WMDVBE						2013 Program Total				
3			Installations		Dwellings		Costs		Installations		Dwellings		Costs		Units Installed	Households	Costs ¹	Cost/ Unit	Cost/ Household
4			Units	%	Units	%	\$	%	Units	%	Units	%	\$	%					
5	Dwellings	Each	83,301	78%	83,301	78%	54,369,646	62%	23,647	22%	23,647	22%	33,934,375	38%	106,948	106,948	88,304,021	826	826
6	Appliances																		
7	High Efficiency Clothes Washer	Each	0	0%	0	0%	98,160	1%	18,537	100%	18,537	100%	13,907,784	99%	18,537	18,537	14,005,944	756	756
8	Refrigerators	Each																	
9	Microwaves	Each																	
10	Domestic Hot Water																		
11	Water Heater Blanket	Home	1,700	37%	1,699	37%	87,605	37%	2,847	63%	2,846	63%	146,815	63%	4,547	4,545	234,420	52	52
12	Low Flow Shower Head	Home	101,152	69%	70,721	71%	2,861,186	70%	45,935	31%	28,929	29%	1,245,407	30%	147,087	99,650	4,106,593	28	41
13	Water Heater Pipe Insulation	Home	1,640	41%	1,601	41%	33,008	41%	2,375	59%	2,276	59%	46,672	59%	4,015	3,877	79,681	20	21
14	Faucet Aerator	Home	146,989	71%	70,156	72%	1,041,693	71%	59,448	29%	27,379	28%	419,555	29%	206,437	97,535	1,461,248	7	15
15	Water Heater Repair/Replacement	Each	1,382	77%	1,381	77%	1,082,985	71%	422	23%	420	23%	440,425	29%	1,804	1,801	1,523,409	844	846
16	Thermostatic Shower Valve	Each	75,139	66%	52,315	68%	3,060,145	66%	38,737	34%	24,604	32%	1,568,080	34%	113,876	76,919	4,628,225	41	60
17	Enclosure																		
18	Air Sealing / Envelope	Home	876,533	67%	60,183	69%	15,537,577	72%	424,325	33%	26,651	31%	6,169,701	28%	1,300,858	86,834	21,707,278	17	250
19	Attic Insulation	Home	3,474,923	53%	3,563	55%	3,656,186	53%	3,050,618	47%	2,930	45%	3,215,442	47%	6,525,541	6,493	6,871,627	1	1,058
20	HVAC																		
21	FAU Standing Pilot Light Conversion	Each	27	50%	27	50%	8,530	53%	27	50%	27	50%	7,512	47%	54	54	16,042	297	297
22	Furnace Repair/Replacement	Each	10,289	89%	9,919	89%	11,282,334	91%	1,286	11%	1,261	11%	1,184,178	9%	11,575	11,180	12,466,513	1,077	1,115
23	Room A/C Replacement	Each																	
24	Central A/C Replacement	Each																	
25	Heat Pump Replacement	Each																	
26	Evaporative Coolers (Replacement)	Each																	
27	Evaporative Coolers (Installation)	Each																	
28	Duct Testing and Sealing	Home	1,164	47%	1,141	47%	1,472,396	60%	1,302	53%	1,291	53%	979,889	40%	2,466	2,432	2,452,286	994	1,008
29	Maintenance																		
30	Furnace Clean and Tune	Home	19,732	71%	18,949	71%	1,190,381	70%	8,226	29%	7,801	29%	506,887	30%	27,958	26,750	1,697,268	61	63
31	Central A/C Tune-up	Home																	
32	Evaporative Cooler Maintenance	Home																	
33	Lighting																		
34	Compact Fluorescent Lights (CFLs)	Each																	
35	Interior Hard wired CFL fixtures	Each																	
36	Exterior Hard wired CFL fixtures	Each																	
37	Torchiere	Each																	
38	Occupancy Sensor	Each																	
39	LED Night Lights	Each																	
40	Miscellaneous																		
41	Pool Pumps	Each																	
42	Smart Power Strips	Each																	
43	Pilots																		
44		Each																	
45		Each																	
46	Customer Enrollment																		
47	Outreach & Assessment	Home	83,301	78%	83,301	78%	11,956,790	76%	23,647	22%	23,647	22%	3,785,969	24%	106,948	106,948	15,742,759	147	147
48	In-Home Education	Home	83,817	78%	83,817	78%	1,000,800	76%	23,648	22%	23,648	22%	309,930	24%	107,465	107,465	1,310,730	12	12
49																			
50	¹ The Total Savings/Expenditures amount does not include credits, expenses, or required adjustments for this period in various IO's																		

	A	B	C	D	E
1	PY 2013 Energy Savings Assistance Program Annual Report ESA Program Table 7 Expenditures Recorded by Cost Element SOUTHERN CALIFORNIA GAS COMPANY				
2	ESA Program:	Labor¹	Non-Labor²	Contractor³	Total
3	Energy Efficiency				
4	Appliances		\$ -	\$ 13,740,908	\$ 13,740,908
5	Domestic Hot Water		\$ -	\$ 12,033,576	\$ 12,033,576
6	Enclosure		\$ -	\$ 28,578,903	\$ 28,578,903
7	HVAC		\$ -	\$ 14,934,840	\$ 14,934,840
8	Maintenance		\$ -	\$ 1,697,268	\$ 1,697,268
9	Lighting		\$ -	\$ -	\$ -
10	Miscellaneous		\$ -	\$ -	\$ -
11	Customer Enrollment		\$ 57,521	\$ 15,742,759	\$ 15,800,281
12	In Home Education		\$ 276,218	\$ 1,310,730	\$ 1,586,948
13	Pilot		\$ -	\$ -	\$ -
14	Energy Efficiency TOTAL	\$ -	\$ 333,740	\$ 88,038,984	\$ 88,372,724
15					
16	Training Center	\$ 287,455	\$ 4,709	\$ -	\$ 292,165
17	Inspections	\$ -	\$ -	\$ 1,909,890	\$ 1,909,890
18	Marketing and Outreach ⁴	\$ (331)	\$ 1,310,474	\$ -	\$ 1,310,142
19	Statewide Marketing Education and Outreach	\$ -	\$ -	\$ -	\$ -
20	Measurement and Evaluation Studies	\$ -	\$ 459,866	\$ -	\$ 459,866
21	Regulatory Compliance	\$ 281,589	\$ 9,260	\$ -	\$ 290,849
22	General Administration	\$ 3,812,458	\$ 1,099,136	\$ 0	\$ 4,911,594
23	CPUC Energy Division	\$ -	\$ 7,384	\$ 0	\$ 7,384
24					
25	TOTAL PROGRAM COSTS	\$ 4,381,171	\$ 3,224,569	\$ 89,948,874	\$ 97,554,614
26					
27	¹ Labor: Utility staff labor including indirects (vacation and sick leave, payroll taxes, and affiliate labor indirects).				
28	² Non-Labor: All Other non-labor cost excluding contractor cost defined below.				
29	³ Contractor: Expenses associated with contractor installations, Weatherization, Inspections, Outreach and Assessment, and In				
30	Home Energy Education services.				
31	⁴ Correction made to Marketing and Outreach labor resulting in a net credit amount for PY 2013.				

	A	B	C	D	E	F	G	H	I
1	PY 2013 Energy Savings Assistance Program Annual Report ESA Program Table 8 ESA Program Homes Unwilling / Unable to Participate SOUTHERN CALIFORNIA GAS COMPANY								
2	Reason Provided								
3	County	Customer/ Landlord Declined Program Measures or is Non- Responsive	Customer Unavailable - Scheduling Conflicts	Hazardous Environment (unsafe/unclean)	Insufficient feasible Measures	Ineligible Dwelling - Prior Program Participation	Household Income Exceeds Allowable Limits	Unable to Provide Required Documentation	Other
4	Fresno	40	2	0	3	2	2	0	4
5	Imperial	10	0	0	86	1	11	16	3
6	Kern	145	0	0	6	3	74	4	6
7	Kings	36	2	0	1	4	11	1	4
8	Los Angeles	2,588	24	0	700	43	1,340	1,077	223
9	Orange	423	4	0	57	23	246	151	34
10	Riverside	618	14	0	64	14	456	323	70
11	San Bernardino	945	32	0	65	5	502	501	86
12	San Luis Obispo	8	2	0	0	0	8	0	6
13	Santa Barbara	184	1	0	14	1	49	12	7
14	Tulare	139	6	0	52	53	479	4	26
15	Ventura	69	1	0	19	6	43	9	7
16	Total	5,205	88	0	1,067	155	3,221	2,098	476

	A	B	C	D	E	F	G
1	PY 2013 Energy Savings Assistance Program Annual Report ESA Program Table 9 Life Cycle Bill Savings by Measure SOUTHERN CALIFORNIA GAS COMPANY						
2	Measure Description		2013 Number Installed	Per Measure Electric Impact - Average (kWh)	Per Measure Gas Impact (Therms)	Effective Useful Life (EUL)	2013 Total Measure Life Cycle Bill Savings
3	Appliances						
4	High Efficiency Clothes Washer	Each	18,537		27.30	14	2,820,290
5	Refrigerators	Each					
6	Microwaves	Each					
7	Domestic Hot Water						
8	Water Heater Blanket	Home	4,545		4.66	5	51,685
9	Low Flow Shower Head	Home	99,650		3.54	10	2,263,967
10	Water Heater Pipe Insulation	Home	3,877		3.02	15	70,963
11	Faucet Aerator	Home	97,535		0.71	5	358,279
12	Water Heater Repair/Replacement	Each	1,804		0.00	6	0
13	Thermostatic Shower Valve	Each	113,876		13.60	10	6,732,899
14	Enclosure						
15	Air Sealing / Envelope	Home	86,834		3.58	10	1,355,084
16	Attic Insulation	Home	6,493		7.42	25	382,311
17	HVAC						
18	FAU Standing Pilot Light Conversion	Each	54		42.00	18	14,927
19	Furnace Repair/Replacement	Each	11,575		0.00	14	0
20	Room A/C Replacement	Each					
21	Central A/C Replacement	Each					
22	Heat Pump Replacement	Each					
23	Evaporative Coolers (Replacement)	Each					
24	Evaporative Coolers (Installation)	Each					
25	Duct Testing and Sealing	Home	2,432		0.00	25	0
26	Maintenance						
27	Furnace Clean and Tune	Home	26,750		2.46	14	383,819
28	Central A/C Tune-up	Home					
29	Evaporative Cooler Maintenance	Home					
30	Lighting						
31	Compact Fluorescent Lights (CFLs)	Each					
32	Interior Hard wired CFL fixtures	Each					
33	Exterior Hard wired CFL fixtures	Each					
34	Torchiere	Each					
35	Occupancy Sensor	Each					
36	LED Night Lights	Each					
37	Miscellaneous						
38	Pool Pumps	Each					
39	Smart Power Strips	Each					
40	Pilots						
41		Each					
42							
43	Total Homes Served By the Program		106,948				106,948
44	Life Cycle Bill Savings Per Home						135

	A	B	C
1	PY 2013 Energy Savings Assistance Program Annual Report ESA Program Table 10 Energy Rate Used for Bill Savings Calculations SOUTHERN CALIFORNIA GAS COMPANY		
2	Year	\$/kWh	\$/Therm
3	2013		0.54
4	2014		0.55
5	2015		0.57
6	2016		0.59
7	2017		0.60
8	2018		0.62
9	2019		0.64
10	2020		0.66
11	2021		0.68
12	2022		0.70
13	2023		0.72
14	2024		0.74
15	2025		0.76
16	2026		0.79
17	2027		0.81
18	2028		0.84
19	2029		0.86
20	2030		0.89
21	2031		0.91
22	2032		0.94
23	2033		0.97
24	2034		1.00
25	2035		1.03
26	2036		1.06
27	2037		1.09

	A	B	C	D	E
1	PY 2013 Energy Savings Assistance Program Annual Report ESA Program Table 11 Bill Savings Calculations by Program Year SOUTHERN CALIFORNIA GAS COMPANY				
2	Program Year	Program Costs	Program Lifecycle Bill Savings	Program Bill Savings/ Cost Ratio	Per Home Average Lifecycle Bill Savings
3	2011	\$ 102,229,848	\$ 25,969,055	0.25	\$ 161
4	2012	\$ 82,252,135	\$ 10,706,569	0.13	\$ 110
5	2013	\$ 97,554,614	\$ 14,434,223	0.15	\$ 135

PY2013 Energy Savings Assistance Program Annual Report																															
ESA Program Table 12																															
Energy Savings Assistance Program Fund Shifting																															
SOUTHERN CALIFORNIA GAS COMPANY																															
FUND SHIFT AMOUNT																															
Date	Program Year 2013	Budget			Expenditures			(Shift) or Carried Forward			Among Categories within			Carry Forward from 2012			Carry Back from 2014			Total Shifted Gas/ Electric ¹	% of Authorized Total	Fund Shifting Source 1. Current Year Authorized 2. Carried Forward 3. Carried Back	To/From Year	Fund Shift Description	Authorization						
		Electric	Gas	Total Authorized	Electric	Gas	Total Expenditures	Electric	Gas	Total	Variance	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas							Total					
7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36		
10	ESA Program	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx			
11	Energy Efficiency																														
12	July	Appliance ²	\$ -	\$ 6,449,788	\$ 6,449,788	\$ -	\$ 13,740,908	\$ 13,740,908	\$ -	\$ 7,291,120	\$ 7,291,120	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 7,291,120	\$ 7,291,120	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 7,291,120	113%	1. Carried Forward	1. From 2008	1. From In-Home Energy Education	1. G-xxxx, D-xx-xx-xxxx
13	Sept	Domestic Hot Water ³	\$ -	\$ 15,460,812	\$ 15,460,812	\$ -	\$ 12,033,576	\$ 12,033,576	\$ -	\$ (3,427,236)	\$ (3,427,236)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	2. From 2012	2. From 2012	2. From 2012 unspent funds carried forward.	2. Authorized by D.12-08-044, Section 6.2 Fund Shifting Rules.	
14	Sept	Enclosure ³	\$ -	\$ 40,418,299	\$ 40,418,299	\$ -	\$ 28,578,903	\$ 28,578,903	\$ -	\$ (11,839,396)	\$ (11,839,396)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	3. From 2012	3. From 2012	3. From 2012 unspent funds carried forward.	3. Authorized by D.12-08-044, Section 6.2 Fund Shifting Rules.		
15	Sept	HVAC ³	\$ -	\$ 18,006,083	\$ 18,006,083	\$ -	\$ 14,934,840	\$ 14,934,840	\$ -	\$ (3,071,243)	\$ (3,071,243)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	1. From 2012	1. From 2012	1. From 2012 unspent funds carried forward.	1. Authorized by D.12-08-044, Section 6.2 Fund Shifting Rules.		
16	Sept	Maintenance ³	\$ -	\$ 2,496,293	\$ 2,496,293	\$ -	\$ 1,697,268	\$ 1,697,268	\$ -	\$ (799,025)	\$ (799,025)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	2. From 2012	2. From 2012	2. From 2012 unspent funds carried forward.	2. Authorized by D.12-08-044, Section 6.2 Fund Shifting Rules.		
17		Lighting	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	3. From 2012	3. From 2012	3. From 2012 unspent funds carried forward.	3. Authorized by D.12-08-044, Section 6.2 Fund Shifting Rules.		
18		Miscellaneous	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	1. From 2012	1. From 2012	1. From 2012 unspent funds carried forward.	1. Authorized by D.12-08-044, Section 6.2 Fund Shifting Rules.		
19	Sept	Customer Enrollment ³	\$ -	\$ 20,746,914	\$ 20,746,914	\$ -	\$ 15,800,281	\$ 15,800,281	\$ -	\$ (4,946,633)	\$ (4,946,633)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	2. From 2012	2. From 2012	2. From 2012 unspent funds carried forward.	2. Authorized by D.12-08-044, Section 6.2 Fund Shifting Rules.		
20	Sept	In Home Education ³	\$ -	\$ 2,517,638	\$ 2,517,638	\$ -	\$ 1,586,948	\$ 1,586,948	\$ -	\$ (930,690)	\$ (930,690)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	3. From 2012	3. From 2012	3. From 2012 unspent funds carried forward.	3. Authorized by D.12-08-044, Section 6.2 Fund Shifting Rules.		
21		Pilot	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	1. From 2012	1. From 2012	1. From 2012 unspent funds carried forward.	1. Authorized by D.12-08-044, Section 6.2 Fund Shifting Rules.	
22		Energy Efficiency TOTAL	\$ -	\$ 106,095,827	\$ 106,095,827	\$ -	\$ 88,372,724	\$ 88,372,724	\$ -	\$ (17,723,103)	\$ (17,723,103)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 7,291,120	\$ 7,291,120	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 7,291,120	7%	2. From 2012	2. From 2012	2. From 2012 unspent funds carried forward.	2. Authorized by D.12-08-044, Section 6.2 Fund Shifting Rules.	
24		Training Center	\$ -	\$ 663,921	\$ 663,921	\$ -	\$ 292,165	\$ 292,165	\$ -	\$ (371,756)	\$ (371,756)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	1. From 2012	1. From 2012	1. From 2012 unspent funds carried forward.	1. Authorized by D.12-08-044, Section 6.2 Fund Shifting Rules.	
25		Inspections	\$ -	\$ 3,063,896	\$ 3,063,896	\$ -	\$ 1,909,890	\$ 1,909,890	\$ -	\$ (1,154,006)	\$ (1,154,006)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	2. From 2012	2. From 2012	2. From 2012 unspent funds carried forward.	2. Authorized by D.12-08-044, Section 6.2 Fund Shifting Rules.	
26	Dec	Marketing and Outreach ⁴	\$ -	\$ 1,272,007	\$ 1,272,007	\$ -	\$ 1,310,142	\$ 1,310,142	\$ -	\$ 38,135	\$ 38,135	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 38,135	\$ 38,135	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 38,135	3%	3. Carried Forward	3. From 2012	3. From 2012 unspent funds carried forward.	3. Authorized by D.12-08-044, Section 6.2 Fund Shifting Rules.	
27		Statewide ME&O	\$ -	\$ 100,000	\$ 100,000	\$ -	\$ -	\$ -	\$ -	\$ (100,000)	\$ (100,000)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	1. From 2012	1. From 2012	1. From 2012 unspent funds carried forward.	1. Authorized by D.12-08-044, Section 6.2 Fund Shifting Rules.	
28	Dec	M&E Studies ⁵	\$ -	\$ 91,667	\$ 91,667	\$ -	\$ 459,866	\$ 459,866	\$ -	\$ 368,199	\$ 368,199	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 279,679	\$ 279,679	\$ -	\$ 88,520	\$ 88,520	\$ 368,199	\$ 368,199	\$ 368,199	402%	3. Carried Forward	3. From 2012	3. From 2012 unspent funds carried forward.	3. Authorized by D.12-08-044, Section 6.2 Fund Shifting Rules.		
29		Regulatory Compliance	\$ -	\$ 295,333	\$ 295,333	\$ -	\$ 290,849	\$ 290,849	\$ -	\$ (4,484)	\$ (4,484)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	2. From 2012	2. From 2012	2. From 2012 unspent funds carried forward.	2. Authorized by D.12-08-044, Section 6.2 Fund Shifting Rules.	
30		General Administration	\$ -	\$ 5,891,204	\$ 5,891,204	\$ -	\$ 4,911,594	\$ 4,911,594	\$ -	\$ (979,610)	\$ (979,610)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	1. From 2012	1. From 2012	1. From 2012 unspent funds carried forward.	1. Authorized by D.12-08-044, Section 6.2 Fund Shifting Rules.	
31		CPUC Energy Division	\$ -	\$ 86,000	\$ 86,000	\$ -	\$ 7,384	\$ 7,384	\$ -	\$ (78,616)	\$ (78,616)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	2. From 2012	2. From 2012	2. From 2012 unspent funds carried forward.	2. Authorized by D.12-08-044, Section 6.2 Fund Shifting Rules.	
32		TOTAL PROGRAM COSTS	\$ -	\$ 117,559,855	\$ 117,559,855	\$ -	\$ 97,554,614	\$ 97,554,614	\$ -	\$ (20,005,241)	\$ (20,005,241)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 7,608,934	\$ 7,608,934	\$ -	\$ 88,520	\$ 88,520	\$ 7,697,454	\$ 7,697,454	\$ 7,697,454	7%	3. Carried Forward	3. From 2012	3. From 2012 unspent funds carried forward.	3. Authorized by D.12-08-044, Section 6.2 Fund Shifting Rules.		
33		¹ Carry Forward from FY 2012 = \$7,608,934	\$ -	\$ 7,608,934	\$ 7,608,934	\$ -	\$ -	\$ -	\$ -	\$ (7,608,934)	\$ (7,608,934)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -					
34		² Carry Back from 2014 = \$88,520	\$ -	\$ 88,520	\$ 88,520	\$ -	\$ -	\$ -	\$ -	\$ (88,520)	\$ (88,520)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -					
35		TOTAL PROGRAM INCLUDING CARRY FORWARD / CARRY BACK	\$ -	\$ 125,257,309	\$ 125,257,309	\$ -	\$ 97,554,614	\$ 97,554,614	\$ -	\$ (27,702,695)	\$ (27,702,695)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 7,608,934	\$ 7,608,934	\$ -	\$ 88,520	\$ 88,520	\$ 7,697,454	\$ 7,697,454	\$ 7,697,454	\$ 7,697,454	6%	3. Carried Forward	3. From 2012	3. From 2012 unspent funds carried forward.	3. Authorized by D.12-08-044, Section 6.2 Fund Shifting Rules.	

Note: Numbers reported in standard accounting format, with negative amounts displayed in parentheses (\$xxx,xxx).

¹ SoCalGas' 2012 total unspent balance available for carry-forward was \$26,700,923 (2012 authorized budget of \$113,292,891 less net 2012 carry-back to 2011 of \$3,049,478 less 2012 expenditures of \$83,542,490).

² In July 2013 Monthly report, SoCalGas noted a fund shift of \$7,436,002 in Appliance budget based on increased contract value. The actual fund shift needed based on actual expenditures was \$7,291,120.

³ In September 2013 Monthly report, SoCalGas noted a fund shift of \$3,592,226 in Energy Efficiency budget based on increased contract value. This fund shift was not needed since 2013 year-end actual expenditures were below authorized budgets.

⁴ In December 2013 Monthly report, SoCalGas noted a fund shift of \$38,135 in M&O budget funded from 2012 unspent balance.

⁵ In December 2013 Monthly report, SoCalGas noted a fund shift in Measurement & Evaluation budget of \$368,196 where the \$279,679 came from 2012 as carry forward plus the \$88,520 as carry back from 2014.

Fund shift in Measurement & Evaluation is to align the budget category amount for the cycle with the expenditures. SoCalGas does not control the actual timing of completion of studies or invoicing from lead IOUs.

	A	B
1	PY 2013 Energy Savings Assistance Program Annual Report ESA Program Table 13 Categorical and Other Enrollment SOUTHERN CALIFORNIA GAS COMPANY	
2		
3		
4		
5		
6	Type of Enrollment	Number of customers treated ¹
7	Women, Infants, and Children Program (WIC)	8,019
8	Supplemental Security Income (SSI)	3,466
9	CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	2,410
10	CalWORKs/Temporary Assistance for Needy Families (TANF)	515
11	Tribal TANF	6
12	Medicaid/Medi-Cal for Families	3,804
13	Healthy Families A&B	1,263
14	National School Lunch Program (NSLP) - Free Lunch	1,982
15	Low-income Home Energy Assistance Program (LIHEAP)	1,002
16	Bureau of Indian Affairs General Assistance	8
17	Head Start Income Eligible - (Tribal Only)	1
18	Other (specify)	84,472
19	Total Number of Customers Enrolled	106,948
20	¹ Number of customers treated reflects categorical programs selected by customer. Please note in some case customer select more than one eligible program for a single account.	

	A	B	C	D	E	F	G	H	I	J	K	L
1	PY 2013 Energy Savings Assistance Program Annual Report ESA Program Table 14 Leveraging & Integration SOUTHERN CALIFORNIA GAS COMPANY											
2	Coordination Type ¹	Partner	Brief Description of Effort	Relationship outside the IOU?	MOU Present?	Amount of Dollars Saved ²	Amount of Energy Savings (therm) ³	Other Measureable Benefits ³	Enrollments Resulting from Leveraging Effort ⁴	Methodology ⁵	Meets all Criteria	If not, Explain
3	Leveraging	Riverside Public Utilities (RPU)	SoCalGas has a signed leveraging contract with RPU	Yes	Yes	\$ 310	22,346 kWh through various electric measures installed	83 13W CFL's, 107 23W CFL's, and 19 Smart Power Down Strips	38	See note "A".	Yes	N/A
4	Leveraging	EMWD	EMWD co-funded the ESA Program High Efficiency Clothes Washer Measure (HECW) for unit installed in overlapping territory.	Yes	Yes	\$ 221,488	7792.52	9.91 million gallons of water saved	299	See note "A".	Yes	N/A
5	Leveraging	Park Water Company	Park Water Co. co-funded the ESA Program High Efficiency Clothes Washer Measure (HECW) for unit installed in overlapping territory.	Yes	Yes	\$ 42,800	1505.82	2.95 million gallons of water saved	58	See note "A".	Yes	N/A
6	Integration	Asian American Resource Center	Shared outreach costs with CARE Program	N/A	N/A	\$ 2,500	N/A	N/A	N/A	N/A	N/A	N/A
7	Integration	Pacific Asian Consortium in Employment	Shared outreach costs with CARE Program	N/A	N/A	\$ 2,500	N/A	N/A	N/A	N/A	N/A	N/A
8	Integration	2013 California Poppy Festival	Shared outreach costs with CARE Program	N/A	N/A	\$ 600	N/A	N/A	N/A	N/A	N/A	N/A
9	Integration	Alhambra Eco Fair	Shared outreach costs with EE Program	N/A	N/A	\$ 100	N/A	N/A	N/A	N/A	N/A	N/A
10	Integration	Fiestas Patrias in Coachella	Shared outreach costs with CARE and Advanced Meter Initiative	N/A	N/A	\$ 333	N/A	N/A	N/A	N/A	N/A	N/A
11	Integration	34th Annual Children's Fair	Shared outreach costs with CARE and EE Program	N/A	N/A	\$ 500	N/A	N/A	N/A	N/A	N/A	N/A
12	Integration	USC Kid Watch Safety and Health Fair	Shared outreach costs with CARE Program	N/A	N/A	\$ 200	N/A	N/A	N/A	N/A	N/A	N/A
13	Integration	RoseHills Conference for Seniors & Caregivers	Shared outreach costs with CARE and EE Program	N/A	N/A	\$ 1,200	N/A	N/A	N/A	N/A	N/A	N/A
14	Integration	Home Expo and Housing Fair in East Los Angeles	Shared outreach costs with CARE and EE Program	N/A	N/A	\$ 2,500	N/A	N/A	N/A	N/A	N/A	N/A
15	Integration	10th Annual Housing & Supportive Services, El Centro	Shared outreach costs with CARE Program	N/A	N/A	\$ 500	N/A	N/A	N/A	N/A	N/A	N/A
16	Integration	LA County Fair	Shared outreach costs with CARE Program	N/A	N/A	\$ 5,500	N/A	N/A	N/A	N/A	N/A	N/A
17	Integration	Children's Fair in El Centro	Shared outreach costs with CARE Program	N/A	N/A	\$ 600	N/A	N/A	N/A	N/A	N/A	N/A
18	Integration	El Clasificado Health Fair	Shared outreach costs with CARE Program	N/A	N/A	\$ 2,500	N/A	N/A	N/A	N/A	N/A	N/A
19	Integration	Calle Cuatro Fiestas Patrias	Shared outreach costs with CARE Program	N/A	N/A	\$ 2,500	N/A	N/A	N/A	N/A	N/A	N/A
20	Integration	Los Angeles DEAF Festival (Los Angeles)	Shared outreach costs with CARE Program	N/A	N/A	\$ 275	N/A	N/A	N/A	N/A	N/A	N/A
21												
22	¹ Leveraging, Interdepartmental integration, Program Coordination, Data Sharing, ME&O, etc.											
23	² Leveraging and Integration efforts are measurable and quantifiable in terms of dollars saved by the IOU (Shared/contributed/donated resources, shared marketing materials, shared information technology, shared programmatic infrastructure, among others are just some examples of cost and/or resource savings to the IOU).											
24	³ Energy savings/benefits. Leveraging efforts are measurable and quantifiable in terms of home energy benefits/ savings to the eligible households.											
25	⁴ Enrollment increases. Leveraging efforts are measurable and quantifiable in terms of program enrollment increases and/or customers served.											
26	⁵ In footnotes, provide information on methodology used to calculate cost and/or resource savings.											
27												
28												
29	Dollar savings based on invoiced amount for co-funded measures.											
30	Enrollments calculated by dividing (dollar savings) by (per measure cost). Result is additional customers that can be treated with High Efficiency Washer (rounded up).											
31	Therm savings calculated by multiplying (additional customers that can be treated with High Efficiency Washer) by (per measure therm savings).											

	A	B	C	D	E	F
1	PY 2013 Energy Savings Assistance Program Annual Report					
2	ESA Program Table 15					
3	Lighting					
4	SOUTHERN CALIFORNIA GAS COMPANY					
5	ESA Program CFL Tracking Table					
6	<i>Instructions: Please identify the CFL bulbs used within your ESA program and fill in the remaining columns for each</i>					
7	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? ¹
8						
9						
10						
11						
12						
13						
14						
15						
16						
17						
18						
19						
20						
21						
22						
23						
24						
25						
26						
27	Year	Number of Homes Treated in ESA Program	Number of Homes Provided CFLs	Avg. # of CFL bulbs given per home	Est. total energy savings from installed CFLs ²	
28						
29						
30						
31						
32						
33						
34	¹ Compliant in regards to: 1) Do bulbs meet or exceed CEC energy efficiency standards for general purpose lighting?					
35	Do all models comply with Europe's RoHS standards on toxicity?					
36	² Energy savings used are from the Load Impact Evaluation of the 2009 Energy Savings Assistance Program.					

Not Applicable to SCG

	A	B	C	D	E	F	G	H
1	PY 2013 Energy Savings Assistance Program Annual Report							
2	ESA Program Table 16							
3	"Add Back" Measures							
4	SOUTHERN CALIFORNIA GAS COMPANY							
5			Ratio of Benefits Over Costs					
6	Measure	Climate Zone	Utility Cost Test	Modified Participant Test	Total Resource Cost Test	Quantity Installed	Budget Impact of "Add Back"	Energy Savings Impact
7	Air sealing / envelope, MF	4	0.04	0.25	0.03	107	10,666	195
8	Air sealing / envelope, MF	5	0.04	0.21	0.03	308	42,773	656
9	Air sealing / envelope, MF	6	0.02	0.12	0.02	908	119,095	1,066
10	Air sealing / envelope, MF	7	N/A	N/A	N/A	0	0	0
11	Air sealing / envelope, MF	8	0.02	0.09	0.01	4,837	920,966	5,678
12	Air sealing / envelope, MF	9	0.02	0.11	0.01	5,696	833,028	6,686
13	Air sealing / envelope, MF	10	0.02	0.11	0.01	868	139,676	1,057
14	Air sealing / envelope, MF	13	0.03	0.19	0.02	1,990	286,404	3,980
15	Air sealing / envelope, MF	14	0.04	0.25	0.03	59	6,745	121
16	Air sealing / envelope, MF	15	0.03	0.15	0.02	1,229	153,797	1,603
17	Air sealing / envelope, MF	16	0.04	0.23	0.03	314	27,637	464
18	Air sealing / envelope, MH	4	0.32	1.86	0.23	18	2,903	497
19	Air sealing / envelope, MH	5	0.46	2.71	0.33	139	15,088	4,381
20	Air sealing / envelope, MH	6	0.29	1.70	0.21	349	40,733	6,206
21	Air sealing / envelope, MH	7	N/A	N/A	N/A	0	0	0
22	Air sealing / envelope, MH	8	0.34	2.00	0.24	530	49,843	9,424
23	Air sealing / envelope, MH	9	0.31	1.82	0.22	249	26,562	4,427
24	Air sealing / envelope, MH	10	0.27	1.53	0.19	1,238	165,929	22,282
25	Air sealing / envelope, MH	13	0.29	1.70	0.21	468	92,073	14,100
26	Air sealing / envelope, MH	14	0.35	2.04	0.25	302	47,444	9,217
27	Air sealing / envelope, MH	15	0.26	1.49	0.18	287	43,368	5,615
28	Air sealing / envelope, MH	16	0.30	1.77	0.21	68	9,415	1,514
29	Air sealing / envelope, SF	4	0.24	1.40	0.17	223	46,169	5,555
30	Air sealing / envelope, SF	5	0.24	1.37	0.17	1,447	351,677	41,141
31	Air sealing / envelope, SF	6	0.14	0.78	0.10	2,400	631,124	38,501
32	Air sealing / envelope, SF	7	N/A	N/A	N/A	0	0	0
33	Air sealing / envelope, SF	8	0.13	0.74	0.09	16,679	4,640,780	267,564
34	Air sealing / envelope, SF	9	0.13	0.74	0.09	13,755	3,860,051	220,657
35	Air sealing / envelope, SF	10	0.15	0.87	0.11	14,070	3,324,189	228,157
36	Air sealing / envelope, SF	13	0.15	0.89	0.11	9,957	3,845,771	270,545
37	Air sealing / envelope, SF	14	0.24	1.36	0.17	3,036	719,141	83,548
38	Air sealing / envelope, SF	15	0.17	0.99	0.12	3,793	838,626	66,948
39	Air sealing / envelope, SF	16	0.17	0.99	0.12	1,658	415,600	33,301
40	Attic insulation, MF	4	N/A	N/A	N/A	0	0	0
41	Attic insulation, MF	5	N/A	N/A	N/A	0	0	0
42	Attic insulation, MF	6	0.06	0.05	0.04	10	7,868	205
43	Attic insulation, MF	7	N/A	N/A	N/A	0	0	0
44	Attic insulation, MF	8	0.07	0.05	0.04	119	83,869	2,436
45	Attic insulation, MF	9	0.06	0.05	0.04	143	102,018	2,928
46	Attic insulation, MF	10	0.06	0.05	0.04	5	3,804	104
47	Attic insulation, MF	13	0.08	0.07	0.06	38	34,376	1,318
48	Attic insulation, MF	14	N/A	N/A	N/A	0	0	0
49	Attic insulation, MF	15	0.14	0.12	0.10	1	530	35
50	Attic insulation, MF	16	0.09	0.08	0.06	2	1,660	69
51	Attic insulation, SF	4	0.16	0.13	0.11	13	14,554	1,085
52	Attic insulation, SF	5	0.17	0.14	0.12	143	168,450	13,628
53	Attic insulation, SF	6	0.12	0.10	0.08	499	501,677	26,846
54	Attic insulation, SF	7	N/A	N/A	N/A	0	0	0
55	Attic insulation, SF	8	0.12	0.10	0.08	1,738	1,644,627	93,504
56	Attic insulation, SF	9	0.11	0.09	0.08	1,791	1,897,528	96,355
57	Attic insulation, SF	10	0.10	0.08	0.07	814	997,133	44,245
58	Attic insulation, SF	13	0.16	0.13	0.11	802	971,071	73,058
59	Attic insulation, SF	14	0.17	0.14	0.12	78	86,264	7,198
60	Attic insulation, SF	15	0.10	0.09	0.07	86	107,589	5,084
61	Attic insulation, SF	16	0.12	0.10	0.08	211	248,609	14,215
62	Duct sealing and testing, MH	4	0.00	0.00	0.00	1	645	0
63	Duct sealing and testing, MH	5	0.00	0.00	0.00	3	4,499	0

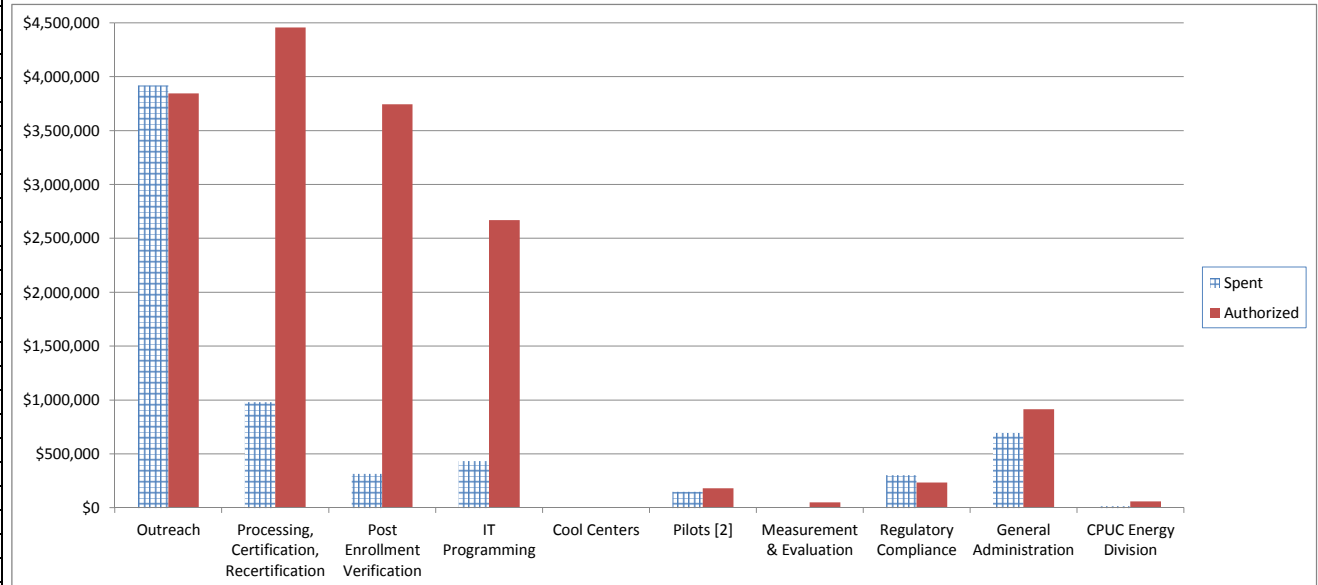
	A	B	C	D	E	F	G	H
1	PY 2013 CARE Annual Report							
2	CARE Table 1							
3	Overall Program Expenses							
4	SOUTHERN CALIFORNIA GAS COMPANY							
5	Category	Overall		Total	Authorized Budget	% of Budget Spent	Total Shifted	Shifted to/from?
6		Electric	Gas					
7	Outreach ¹	\$ -	\$ 3,921,870	\$ 3,921,870	\$ 3,845,745	102%	\$ 76,125	From Unspent 2012 Authorized Budget.
8	Processing, Certification, Recertification	\$ -	\$ 983,603	\$ 983,603	\$ 4,456,213	22%		
9	Post Enrollment Verification	\$ -	\$ 318,737	\$ 318,737	\$ 3,744,000	9%		
10	IT Programming	\$ -	\$ 437,298	\$ 437,298	\$ 2,669,534	16%		
11	Cool Centers	\$ -	\$ -	\$ -	\$ -	N/A		
12	Pilots	\$ -	\$ 150,000	\$ 150,000	\$ 180,000	83%		
13	Measurement & Evaluation	\$ -	\$ -	\$ -	\$ 51,484	0%		
14	Regulatory Compliance ²	\$ -	\$ 304,368	\$ 304,368	\$ 234,962	130%	\$ 69,406	From 2013 General Adm. Authorized Budget.
15	General Administration ²	\$ -	\$ 698,640	\$ 698,640	\$ 915,488	76%	\$ (69,406)	To 2013 Regulatory Comp Authorized Budget.
16	CPUC Energy Division	\$ -	\$ 17,230	\$ 17,230	\$ 60,000	29%		
17								
18	TOTAL Program Costs	\$ -	\$ 6,831,747	\$ 6,831,747	\$ 16,157,426	42%		
19								
20	CARE Rate Discount	\$ -	\$ 118,556,705	\$ 118,556,705	\$129,892,840	91%		
21								
22	TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	\$ -	\$ 125,388,452	\$ 125,388,452	\$146,050,266	86%	\$ 76,125	

¹ Funds shifted (carried forward) from 2012 unspent Authorized Outreach Budget (D.12-08-044) in the amount of \$76,125.

² Funds shifted within 2013 Authorized Budget from General Admin to Regulatory Compliance in the amount of \$69,406.

Note: Outreach 2013 actual expenditures includes an adjusted reduction in the amount (\$67,425) associated with a February 2014 J.E. correction related to December 2013 cost charged in error to Outreach, but should have been posted to Medical Baseline (O&M). 2013 cost charged in error to Outreach. The charge should have been posted to Medical Baseline (O&M).

Bar Chart 1 - Total Spent vs. Authorized by Category



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	
1	PY 2013 CARE Annual Report																									
2	CARE Table 2																									
3	Enrollment, Recertification, Attrition, & Penetration																									
4	SOUTHERN CALIFORNIA GAS COMPANY																									
5		New Enrollment									Recertification					Attrition					Enrollment		Total CARE Participants	Estimated CARE Eligible	Penetration Rate % (W/X)	
6		Automatic Enrollment				Self-Certification (Income or Categorical)					Capitation	Total New Enrollment (E+I+J)	Scheduled	Non-Scheduled (Duplicates)	Automatic	Total Recertification (L+M+N)	No Response to Recert	Failed PEV	Failed Recertification	Other	Total Attrition (P+Q+R+S)	Gross (K+O)				Net Adjusted (K-T)
7	Inter-Utility ¹	Intra-Utility ²	Leveraging ³	Combined (B+C+D)	Online	Paper	Phone	Combined (F+G+H)																		
8	January	5,843	2,411	332	8,586	2,574	17,081	118	19,773	1	28,360	27,764	21,066	11,330	60,160	17,137	3,030	1,070	2,877	24,114	88,520	4,246	1,653,606	1,794,060	92.17%	
9	February	5,876	2,541	310	8,727	4,344	25,750	13	30,107	15	38,849	9,085	12,913	9,979	31,977	13,900	4,053	1,047	23,785	42,785	70,826	(3,936)	1,649,670	1,794,060	91.95%	
10	March	5,445	3,600	388	9,433	3,532	12,144	18	15,694	15	25,142	16,061	18,047	12,869	46,977	10,876	2,961	527	11,144	25,508	72,119	(366)	1,649,304	1,794,060	91.93%	
11	April	4,969	3,196	402	8,567	2,404	12,333	7	14,744	14	23,325	8,509	15,933	10,764	35,206	8,192	2,386	481	9,988	21,047	58,531	2,278	1,651,582	1,797,772	91.87%	
12	May	4,948	3,164	396	8,508	2,363	12,304	6	14,673	10	23,191	12,112	13,388	9,666	35,166	8,587	2,972	453	11,642	23,654	58,357	(463)	1,651,119	1,797,772	91.84%	
13	June	5,115	2,421	362	7,898	2,420	13,885	2	16,307	22	24,227	23,555	21,985	7,600	53,140	10,572	3,326	327	17,810	32,035	77,367	(7,808)	1,643,311	1,797,772	91.41%	
14	July	5,918	2,906	464	9,288	2,545	19,068	11	21,624	19	30,931	29,998	25,820	8,988	64,806	15,797	3,276	542	15,900	35,515	95,737	(4,584)	1,638,727	1,795,429	91.27%	
15	August	4,061	3,390	385	7,836	3,277	15,347	4	18,628	15	26,479	29,890	16,595	8,301	54,786	15,247	3,414	607	18,038	37,306	81,265	(10,827)	1,630,075	1,795,429	90.79%	
16	September	6,287	2,763	243	9,293	2,198	11,030	5	13,233	1	22,527	25,892	17,370	9,840	53,102	12,832	4,341	370	18,988	36,531	75,629	(14,004)	1,618,685	1,795,429	90.16%	
17	October	4,739	3,098	199	8,036	2,082	15,862	1	17,945	15	25,996	35,182	17,799	9,358	62,339	14,387	2,272	532	14,995	32,186	88,335	(6,190)	1,612,495	1,798,002	89.68%	
18	November	6,181	3,457	136	9,774	2,415	14,962	23	17,400	4	27,178	27,391	20,315	8,780	56,486	14,579	3,512	474	9,566	28,131	83,664	(953)	1,611,542	1,798,002	89.63%	
19	December	5,231	3,122	145	8,498	2,214	20,094	20	22,328	0	30,826	36,425	22,330	12,447	71,202	15,552	2,449	573	19,383	37,957	102,028	(7,131)	1,604,411	1,798,002	89.23%	
20	YTD Total	64,613	36,069	3,762	104,444	32,368	189,860	228	222,456	131	327,031	281,864	223,561	119,922	625,347	157,658	37,992	7,003	174,116	376,769	952,378	-49,738	1,604,411	1,798,002	89.23%	
21																										
22	¹ Enrollments via data sharing between the IOUs.																									
23	² Enrollments via data sharing between departments and/or programs within the utility.																									
24	³ Enrollments via data sharing with programs outside the IOU that serve low-income customers.																									
25	Enrollment numbers in Table 2 are defined as customers receiving the CARE discount in the month. Customers are approved for or removed from CARE in the month they apply but will receive the discount in the following month; the approval will be counted the following month, but in the following month will count in the following month.																									

	A	B	C	D	E	F	G	H	I
1	PY 2013 CARE Annual Report								
2	CARE Table 3A								
3	Post-Enrollment Verification Results (Model) 2013								
4	SOUTHERN CALIFORNIA GAS COMPANY								
5	2013	Total CARE Households Enrolled	Households Requested to Verify	% of CARE Enrolled Requested to Verify	CARE Households De-Enrolled (Due to no response)	CARE Households De-Enrolled (Verified as Ineligible) ¹	Total Households De-Enrolled ²	% De-enrolled through Post Enrollment Verification	% of Total CARE Households De-Enrolled
6	January	1,653,606	5,282	0.32%	3,108	229	3,337	63.18%	0.20%
7	February	1,649,670	5,359	0.32%	2,807	237	3,044	56.80%	0.18%
8	March	1,649,304	6,207	0.38%	3,167	233	3,400	54.78%	0.21%
9	April	1,651,582	6,973	0.42%	3,860	254	4,114	59.00%	0.25%
10	May	1,651,119	8,847	0.54%	5,475	383	5,858	66.21%	0.35%
11	June	1,643,311	885	0.05%	220	25	245	27.68%	0.01%
12	July	1,638,727	5,258	0.32%	3,186	363	3,549	67.50%	0.22%
13	August	1,630,075	5,501	0.34%	3,199	368	3,567	64.84%	0.22%
14	September	1,618,685	3,900	0.24%	2,174	208	2,382	61.08%	0.15%
15	October	1,612,495	1,283	0.08%	507	61	568	44.27%	0.04%
16	November	1,611,542	3,958	0.25%	2,180	233	2,413	60.97%	0.15%
17	December	1,604,411	6,060	0.38%	3,356	348	3,704	5.99%	0.02%
18	YTD Total	1,604,411	59,513	3.71%	33,239	2,942	36,181	60.80%	2.26%
19									
20	¹ Includes customers verified as over income or who requested to be de-enrolled.								
21	² Verification results are tied to the month initiated. Therefore, verification results may be pending due to the time permitted for a participant to respond.								
22									
23									
24									
25	CARE Table 3B - Post-Enrollment Verification Results (High Usage)								
26	2013								
27	Not Applicable to SoCalGas								
28	2013	Total CARE Households Enrolled	Households Requested to Verify	% of CARE Enrolled Requested to Verify	CARE Households De-Enrolled (Due to no response)	CARE Households De-Enrolled (Verified as Ineligible) ¹	Total Households De-Enrolled ²	% De-enrolled through Post Enrollment Verification	% of Total CARE Households De-Enrolled
29	January								
30	February								
31	March								
32	April								
33	May								
34	June								
35	July								
36	August								
37	September								
38	October								
39	November								
40	December								
41	YTD Total	0	0	0.00%	0	0	0	0.00%	0.00%
42									
43	¹ Includes customers verified as over income or who requested to be de-enrolled.								
44	² Verification results are tied to the month initiated. Therefore, verification results may be pending due to the time permitted for a participant to respond.								

	A	B	C	D	E	F	G
1	PY 2013 CARE Annual Report						
2	CARE Table 4						
3	CARE Self-Certification and Self-Recertification Applications						
4	SOUTHERN CALIFORNIA GAS COMPANY						
5		Provided ¹	Received	Approved ²	Denied ³	Pending/ Never Completed ⁴	Duplicates ⁵
6	Total	5,418,416	599,076	401,399	34,595	44,501	118,581
7	Percentage		100.00%	67.00%	5.77%	7.43%	19.79%
8	¹ 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. ² Approved includes customers who are approved through mail-in, via web, by phone, and through duplicated applications. ³ Customers are denied due to not being CARE eligible, not customer of record, or not the customer's primary residence. ⁴ Pending/Never Completed includes closed accounts, incomplete applications, and customers of other utilities who are not SoCalGas customers. ⁵ Duplicates are customers who are already enrolled in CARE and mail in another CARE application. SoCalGas treats them as recertification applications.						
9							
10							
11							
12							
13							

	A	B	C	D	E	F	G	H	I	J
1	PY 2013 CARE Annual Report									
2	CARE Table 5									
3	CARE Enrollment by County									
4	SOUTHERN CALIFORNIA GAS COMPANY									
5		Estimated Eligible			Total Participants			Penetration Rate		
6	County	Urban	Rural¹	Total	Urban	Rural	Total	Urban	Rural	Total
7	Fresno	10,589	12	10,601	10,219	16	10,235	96.5%	134.5%	96.5%
8	Imperial	0	16,807	16,807	12	13,064	13,076	N/A	77.7%	77.8%
9	Kern	13,038	27,679	40,717	10,322	27,501	37,823	79.2%	99.4%	92.9%
10	Kings	18	13,025	13,043	17	13,535	13,552	92.3%	103.9%	103.9%
11	Los Angeles	950,402	2,415	952,817	850,712	1,136	851,848	89.5%	47.0%	89.4%
12	Orange	199,952	0	199,952	160,803	20	160,823	80.4%	0.0%	80.4%
13	Riverside	101,534	125,582	227,115	90,020	113,466	203,486	88.7%	90.4%	89.6%
14	San Bernardino	160,571	973	161,545	162,587	799	163,386	101.3%	82.1%	101.1%
15	San Luis Obispo	10,577	17,770	28,347	4,507	12,548	17,055	42.6%	70.6%	60.2%
16	Santa Barbara	34,098	1,067	35,165	28,429	663	29,092	83.4%	62.1%	82.7%
17	Tulare	10,738	45,773	56,511	11,128	44,353	55,481	103.6%	96.9%	98.2%
18	Ventura	53,410	1,974	55,383	47,113	1,441	48,554	88.2%	73.0%	87.7%
19	Total	1,544,926	253,076	1,798,002	1,375,869	228,542	1,604,411	89.1%	90.3%	89.2%
20										
21	¹ Rural includes zip codes classified as such according to the Goldsmith modification that was developed to identify small towns									
22	and rural areas within large metropolitan counties.									
23	Note: Data reflects Year End Enrollment numbers.									

	A	B	C	D	E	F	G	H
1	PY 2013 CARE Annual Report							
2	CARE Table 6							
3	CARE Recertification Results							
4	SOUTHERN CALIFORNIA GAS COMPANY							
5	2013	Total CARE Population	Participants Requested to Recertify	% of Population Total	Participants Recertified	Participants Dropped	Recertification Rate % (E/C)	% of Total Population Dropped (F/B)
6	January	1,653,606	25,278	1.53%	14,833	10,526	58.68%	0.64%
7	February	1,649,670	24,627	1.49%	14,610	10,027	59.33%	0.61%
8	March	1,649,304	36,122	2.19%	20,339	15,783	56.31%	0.96%
9	April	1,651,582	42,081	2.55%	22,973	19,065	54.59%	1.15%
10	May	1,651,119	31,773	1.92%	16,691	15,092	52.53%	0.91%
11	June	1,643,311	33,356	2.03%	17,862	15,526	53.55%	0.94%
12	July	1,638,727	40,640	2.48%	21,429	19,171	52.73%	1.17%
13	August	1,630,075	33,758	2.07%	17,738	16,061	52.54%	0.99%
14	September	1,618,685	36,000	2.22%	19,281	16,792	53.56%	1.04%
15	October	1,612,495	32,936	2.04%	18,288	14,843	55.53%	0.92%
16	November	1,611,542	34,101	2.12%	18,768	15,537	55.04%	0.96%
17	December	1,604,411	37,019	2.31%	19,915	13,701	53.80%	0.85%
18	YTD Total	1,604,411	407,691	25.41%	222,727	182,124	54.63%	11.35%

	A	B	C	D	E	F	G	H
1	PY 2013 CARE Annual Report							
2	CARE Table 7							
3	CARE Capitation Contractors							
4	SOUTHERN CALIFORNIA GAS COMPANY							
5	Contractor Name ¹	Contractor Type (Check one or more if applicable)				Enrollments		
6		Private	CBO	WMDVBE	LIHEAP	Rural	Urban	Total
7	Community Action Partnership of Orange County		X	X	X	0	0	0
8	ELA Communications Energy ED Program		X			0	0	0
9	PACE – Pacific Asian Consortium in Employment		X	X	X	0	0	0
10	Proteus, Inc.		X			0	0	0
11	Community Pantry of Hemet		X			0	0	0
12	Community Action Partnership of San Bernardino		X		X	0	14	14
13	LA Works		X			0	1	1
14	Children’s Hospital of Orange County		X			0	0	0
15	The Companion Line		X			0	0	0
16	CAP Kern		X			0	0	0
17	Across Amer Foundation		X			0	0	0
18	All Peoples Christian Center		X			0	0	0
19	LA County 211		X			0	0	0
20	YMCA Montebello-Commerce		X			0	0	0
21	Sr. Citizens Emergency Fund I.V., Inc.		X			0	0	0
22	CAP Santa Barbara		X			0	0	0
23	Coachella Valley Housing Coalition		X			0	0	0
24	HABBM		X			0	1	1
25	Second Harvest Food Bank of Orange County		X			0	0	0
26	Southeast Community Development Corp.		X			0	0	0
27	Latino Resource Organization		X			0	0	0
28	Independent Living Center of Southern California		X			0	0	0
29	Community Action Partnership - Kern County		X			0	0	0
30	El Concilio del Condado de Ventura		X			0	0	0
31	Ventura Cty Comm Human		X			0	0	0
32	Blessed Sacrament Church		X			0	1	1
33	Starbright Management Services		X			0	0	0
34	Hermanidad Mexicana		X			0	0	0
35	CSET		X			0	2	2
36	Crest Forest Family and Community Service		X			0	0	0
37	CUI – Campesinos Unidos, Inc.		X	X	X	0	0	0
38	New Beginning Outreach		X			0	0	0
39	Veterans in Community Service		X	X	X	0	0	0
40	Chinatown Service Center		X			0	19	19
41	Koreatown Youth and Community Center		X			0	0	0
42	MEND		X			0	0	0
43	Armenian Relief Society		X			0	0	0
44	Catholic Charities of LA – Brownson House		X			0	0	0
45	BroadSpectrum		X			0	0	0
46	OCCC, Inc. (Orange County Community Center)		X			0	4	4
47	Green Light Shipping	X				0	0	0
48	APAC Service Center		X			0	92	92
49	Visalia Emergency Aid Council		X			0	0	0
50	Total Enrollments and Expenditures					0	134	134
51								
52	¹ All capitation contractors with current contracts are listed regardless of whether they have signed up customers or submitted invoices this year.							

	A	B	C	D	E	F	G	H
1	PY 2013 CARE Annual Report							
2	CARE Table 8							
3	CARE Participants per Month							
4	SOUTHERN CALIFORNIA GAS COMPANY							
5	2013	Gas and Electric	Gas Only	Electric Only	Total	Eligible Households	Penetration Rate	% Change ^{1,2}
6	January	N/A	1,653,606	N/A	1,653,606	1,794,060	92.2%	0.3%
7	February	N/A	1,649,670	N/A	1,649,670	1,794,060	92.0%	-0.2%
8	March	N/A	1,649,304	N/A	1,649,304	1,794,060	91.9%	0.0%
9	April	N/A	1,651,582	N/A	1,651,582	1,797,772	91.9%	0.1%
10	May	N/A	1,651,119	N/A	1,651,119	1,797,772	91.8%	0.0%
11	June	N/A	1,643,311	N/A	1,643,311	1,797,772	91.4%	-0.5%
12	July	N/A	1,638,727	N/A	1,638,727	1,795,429	91.3%	-0.3%
13	August	N/A	1,630,075	N/A	1,630,075	1,795,429	90.8%	-0.5%
14	September	N/A	1,618,685	N/A	1,618,685	1,795,429	90.2%	-0.7%
15	October	N/A	1,612,495	N/A	1,612,495	1,798,002	89.7%	-0.4%
16	November	N/A	1,611,542	N/A	1,611,542	1,798,002	89.6%	-0.1%
17	December	N/A	1,604,411	N/A	1,604,411	1,798,002	89.2%	-0.4%
18								
19	¹ Explain any monthly variance of 5% or more in the number of participants.							
20	² The SoCalGas population did not vary by a level of 5% or more in any month during 2013.							

	A	B	C	D
1	PY 2013 CARE Annual Report			
2	CARE Table 9			
3	CARE Average Monthly Usage & Bill			
4	SOUTHERN CALIFORNIA GAS COMPANY			
5	Average Monthly Gas / Electric Usage			
6	Residential Non-CARE vs. CARE Customers			
7	Customer	Gas Therms	Gas Therms	Total
8		Tier 1	Tier 2	
9	Non-CARE	27.5	13.8	41.3
10	CARE	22.8	7.9	30.7
11	Customer	Electric KWh	Electric KWh	Total
12		Tier 1	Tier 2	
13	Non-CARE	N/A	N/A	N/A
14	CARE	N/A	N/A	N/A
15				
16				
17	Average Monthly Gas / Electric Bill			
18	Residential Non-CARE vs. CARE Customers¹			
19	(Dollars per Customer)			
20	Customer	Gas	Electric	
21	Non-CARE	\$39.21	N/A	
22	CARE	\$30.03	N/A	
23				
24	¹ Excludes master-meter usage.			

	A	B	C	D	E	F
1	PY 2013 CARE Annual Report					
2	CARE Table 10					
3	CARE Surcharge & Revenue					
4	SOUTHERN CALIFORNIA GAS COMPANY					
5	Electric					
6	CARE Surcharge and Revenue Collected by Customer Class					
7	Customer Class	Average Monthly		CARE Surcharge as Percent of Bill	Total CARE Surcharge Revenue Collected	Percentage of CARE Surcharge Revenue Collected
8		CARE Surcharge	Monthly Bill			
9						
10	Residential	N/A	N/A	N/A	N/A	N/A
11	Commercial	N/A	N/A	N/A	N/A	N/A
12	Agricultural	N/A	N/A	N/A	N/A	N/A
13	Large/Indust	N/A	N/A	N/A	N/A	N/A
14						
15						
16	Gas					
17	CARE Surcharge and Revenue Collected by Customer Class					
18	Customer Class	Average Monthly		CARE Surcharge as Percent of Bill	Total CARE Surcharge Revenue Collected	Percentage of CARE Surcharge Revenue Collected
19		CARE Surcharge	Monthly Bill			
20						
21	Residential	\$1.16	\$39.21	2.97%	\$53,030,379	44.16%
22	Commercial	\$14.87	\$256.53	5.80%	\$33,449,396	27.85%
23	NG Vehicle	\$647.91	\$9,586.73	6.76%	\$3,288,168	2.74%
24	Industrial	\$141.55	\$809.03	17.50%	\$30,321,885	25.25%
25						
26	Note: Industrial includes both G-NT(D) and G-NT(T) and is net of volumes qualifying for G-COG.					

	A	B	C	D	E	F
1	PY 2013 CARE Annual Report					
2	CARE Table 11					
3	CARE Capitation Applications					
4	SOUTHERN CALIFORNIA GAS COMPANY					
5	Entity	Total Received	Approved	Denied	Pending/ Never Completed	Duplicate
6	Southeast Community Development Corp.	0	0	0	0	0
7	ELA Communications Energy ED Program	0	0	0	0	0
8	PACE – Pacific Asian Consortium in Employment	0	0	0	0	0
9	Proteus, Inc.	0	0	0	0	0
10	Community Pantry of Hemet	0	0	0	0	0
11	Community Action Partnership of San Bernardino	28	12	2	0	14
12	LA Works	1	1	0	0	0
13	Children's Hospital of Orange County	0	0	0	0	0
14	The Companion Line	0	0	0	0	0
15	CAP Kern	0	0	0	0	0
16	Across Amer Foundation	0	0	0	0	0
17	All Peoples Christian Center	0	0	0	0	0
18	LA County 211	1	0	0	0	1
19	YMCA Montebello-Commerce	0	0	0	0	0
20	Sr. Citizens Emergency Fund I.V., Inc.	0	0	0	0	0
21	CAP Santa Barbara	0	0	0	0	0
22	Coachella Valley Housing Coalition	0	0	0	0	0
23	HABBM	0	0	0	0	0
24	Second Harvest Food Bank of Orange County	0	0	0	0	0
25	Southeast Community Development Corp.	0	0	0	0	0
26	Latino Resource Organization	0	0	0	0	0
27	Independent Living Center of Southern California	0	0	0	0	0
28	Community Action Partnership - Kern County	0	0	0	0	0
29	El Concilio del Condado de Ventura	1	1	0	0	0
30	Ventura Cty Comm Human	0	0	0	0	0
31	Blessed Sacrament Church	0	0	0	0	0
32	Starbright Management Services	0	0	0	0	0
33	Hermanidad Mexicana	0	0	0	0	0
34	CSET	2	2	0	0	0
35	Crest Forest Family and Community Service	0	0	0	0	0
36	CUI – Campesinos Unidos, Inc.	0	0	0	0	0
37	New Beginning Outreach	0	0	0	0	0
38	Veterans in Community Service	0	0	0	0	0
39	Chinatown Service Center	22	19	0	0	3
40	Koreatown Youth and Community Center	1	0	0	0	1
41	MEND	0	0	0	0	0
42	Armenian Relief Society	0	0	0	0	0
43	Catholic Charities of LA – Brownson House	0	0	0	0	0
44	BroadSpectrum	0	0	0	0	0
45	OCCC, Inc. (Orange County Community Center)	6	4	0	0	2
46	Green Light Shipping	0	0	0	0	0
47	APAC Service Center	201	92	0	0	109
48	Visalia Emergency Aid Council	0	0	0	0	0
49	TOTAL	263	131	2	0	130

	A	B	C	D	E	F	G
1	PY 2013 CARE Annual Report						
2	CARE Table 12						
3	CARE Expansion Program						
4	SOUTHERN CALIFORNIA GAS COMPANY						
5	Participating Facilities by Month						
6	2013	Gas			Electric		
7		CARE Residential Facilities	CARE Commercial Facilities	Total Gas	CARE Residential Facilities	CARE Commercial Facilities	Total Electric
8	January	14	1,307	1,321	N/A	N/A	N/A
9	February	14	1,190	1,204	N/A	N/A	N/A
10	March	14	1,166	1,180	N/A	N/A	N/A
11	April	14	1,162	1,176	N/A	N/A	N/A
12	May	14	1,144	1,158	N/A	N/A	N/A
13	June	14	1,156	1,170	N/A	N/A	N/A
14	July	14	1,143	1,157	N/A	N/A	N/A
15	August	14	1,149	1,163	N/A	N/A	N/A
16	September	14	1,163	1,177	N/A	N/A	N/A
17	October	14	1,200	1,214	N/A	N/A	N/A
18	November	14	1,204	1,218	N/A	N/A	N/A
19	December	14	1,212	1,226	N/A	N/A	N/A
20							
21							
22	Average Monthly Gas / Electric Usage¹						
23	Customer	Gas		Electric			
24		Therms		KWh			
25	Residential Facilities	30.69		N/A			
26	Commercial Facilities	238.77		N/A			
27							
28							
29	CARE Expansion Self-Certification and Self-Recertification Applications						
30		Received	Approved	Denied	Pending/Never Completed	Duplicates	
31	Total	1,373	1,335	1	37	0	
32	Percentage	N/A	97.2%	0.1%	2.7%	0.00%	
33							
34	¹ Excludes master meter usage.						

	A	B	C	D	E	F	G	H	I	J
1	PY 2013 CARE Annual Report									
2	CARE Table 13									
3	CARE High Usage Verification Results									
4	SOUTHERN CALIFORNIA GAS COMPANY									
5	Stage 1 - IRS Documentation and ESA Agreement				Stage 2 - ESA Participation			Stage 3 - Usage Monitoring		
6	Households Requested to Verify	Removed (No Response)	Removed (Verified Ineligible)¹	Income Verified and Referred to ESA	Failed and Removed²	Ineligible³	Completed	Removed⁴	Appeals Denied	Appeals Approved
7	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
8										
9	¹ Includes customers who were verified as over income, requested to be removed, or did not agree to participate in the ESA Program.									
10	² Includes customers who declined to participate in the ESA Program, failed to respond to appointment requests, or missed multiple appointments.									
11	³ Includes customers who previously participated, did not meet the three-measure minimum, landlord refused, etc. These customers move directly to Stage 3.									
12	⁴ Customers removed for exceeding 600% of baseline in any monthly billing cycle.									

	A	B
1	PY 2013 CARE Annual Report	
2	CARE Table 14	
3	Categorical Enrollment	
4	SOUTHERN CALIFORNIA GAS COMPANY	
5	Type of Enrollment	Number of Customers Enrolled ¹
6	Women, Infants, and Children Program (WIC)	37,875
7	Supplemental Security Income (SSI)	21,020
8	CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	47,032
9	CalWORKs/Temporary Assistance for Needy Families (TANF)	14,341
10	Tribal TANF	N/A
11	Medicaid/Medi-Cal	89,737
12	Healthy Families A&B	11,670
13	National School Lunch Program (NSLP) - Free Lunch	29,952
14	Low-income Home Energy Assistance Program (LIHEAP)	12,220
15	Bureau of Indian Affairs General Assistance	168
16	Head Start Income Eligible - (Tribal Only)	507
17		
18	¹ Number of customers enrolled reflects categorical programs selected by customer. Please note in some case customer select more than one eligible program for a single account.	