

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

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

**MONTHLY REPORT OF SOUTHERN CALIFORNIA GAS COMPANY (U 904 G)  
ON LOW-INCOME ASSISTANCE PROGRAMS FOR APRIL 2011**

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May 23, 2011

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This is the fourth monthly report of program year (PY) 2011. The purpose of this report is to consolidate activity for the CARE and Energy Savings Assistance Program and provide the Energy Division with all the necessary information to assist in analyzing the low-income programs.

This report presents year-to-date Energy Savings Assistance Program and CARE results and expenditures through April 2011 for Southern California Gas Company (SoCalGas).

Respectfully Submitted

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May 23, 2011

**Southern California Gas Company  
Energy Savings Assistance Program  
And  
California Alternate Rates for Energy (CARE)  
Program Monthly Report**

**LOW-INCOME ASSISTANCE PROGRAMS MONTHLY REPORT**  
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## ENERGY SAVINGS ASSISTANCE PROGRAM MONTHLY REPORT

### 1. Energy Savings Assistance Program Executive Summary

#### 1.1. Energy Savings Assistance Program Overview

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

Program Summary for Month			
	Authorized / Planning Assumptions	Actual to Date	%
Budget	\$78,256,269	\$25,919,917	33%
Homes Treated	145,874	45,318	31%
kWh Saved	N/A	N/A	N/A
kW Demand Reduced	N/A	N/A	N/A
Therms Saved	3,345,967	734,083	22%

During the month of April, SoCalGas and its Energy Savings Assistance Program contractor network continued to work diligently on managing the heightened workflow that the 2009-11 program cycle demands. As exhibited in the first 4 months of 2011, SoCalGas and its Energy Savings Assistance Program contractors increased the number of homes treated, processed and paid in April 2011 by 61% as compared with the same 4 month period of 2010.

In April, SoCalGas processed and paid contractor invoices for 15,413 treated homes. SoCalGas also paid for the installation of weatherization measures in 14,000 homes. Energy Savings Assistance Program contractors serviced 1,587 appliances, which included 1,367 furnace repairs/replacements and 220 water heater replacements.

Through its marketing, outreach and enrollment efforts, further expanded upon in section 1.3 of this report, SoCalGas generated 48,641 leads in April, resulting in 9,269 enrollments, 23,978 leads pending enrollment, and 12,649 leads awaiting qualification.

SoCalGas continues searching for opportunities to strengthen its Energy Savings Assistance Program. Current efforts by SoCalGas and its Energy Savings Assistance Program contractor network have resulted in a total homes treated count that is 31% of the 2011 goal through April.

SoCalGas' contractor network plays an integral role in marketing and outreach by pursuing their own initiatives and instituting strategies that best fit their individual business models. SoCalGas continues to make significant efforts to assist the contractor network with capacity building through increased back office support and technical expertise in the area of program delivery. These efforts have contributed to the rapid increase in contractor production towards program goals. In April, SoCalGas distributed applications to the mentee candidates for its Mentorship Program. As part of this mentorship program, qualified participants will have the opportunity for growth and development of certain skills and/or competencies to enhance performance ability in the area of weatherization. The applications for the Mentorship Program are due in May.

## **1.2 Whole Neighborhood Approach Evaluation**

- 1.2.1** Provide a summary of the geographic and customer 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).

In April, SoCalGas combined efforts to provide its Energy Savings Assistance Program contractor network with an additional 124 canvassing lists using the Whole Neighborhood Approach (WNA) strategy. SoCalGas continues to offer its contractors flexibility in the planning, timing and completion of their WNA efforts. This approach, in conjunction with SoCalGas oversight and guidance, allows contractors to customize their activities to meet the needs of each neighborhood as well as the needs of each customer.

Contractors are asked to document all facets of each WNA effort; total number of completed homes, customers not willing to participate, successful canvassing and/or marketing efforts, and any other information that can help increase eligible customer enrollments. This detailed accounting serves to assist both the contractors and SoCalGas with future WNA activities. Additionally, smaller geographic focus of Zip+7 areas, coupled with tracking methods take into account the amount of time contractors spend working in an area and allow SoCalGas to better monitor the success of Energy Savings Assistance Program activities from a whole neighborhood perspective. The tracking methods include detailed instructions to contractors regarding data entry in the HEAT System<sup>1</sup>, both pre- and post-canvassing, to ensure specific information is captured. This information will be used to help SoCalGas distinguish WNA efforts from routine canvassing and also capture the disposition of WNA leads that do not result in an enrollment, (i.e., “unable to contact,” and “customer refused”).

The canvassing lists generated in April were initiated in new Zip+7 areas not previously targeted for WNA efforts (see table below for areas). Collectively, the canvassing lists identified an additional 37,202 customer addresses, of which 17,842 (48%) are potentially eligible based on Energy Savings Assistance Program income eligibility criteria. Additionally, based on SoCalGas data, 11,386 of the 37,202 (31%) addresses are in targeted self-certification PRIZM codes<sup>2</sup>.

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<sup>1</sup> The HEAT System is SoCalGas' Energy Savings Assistance Program program database used to track program activity and expenditures.

<sup>2</sup> Prizm codes are an area set of customer segmentation data widely used for marketing purposes in the United States. The data consist of demographic clusters that categorize every U.S. household into a segment. These segments were developed in part from the analysis of U.S. census data and categorize U.S. consumers into 14 distinct groups and 66 segments. The segments help marketers tailor content to consumers' needs and look at a variety of factors, including income, likes, dislikes, lifestyles and purchase behaviors.

<b><u>Number of WNA Events per City</u></b>	<b><u>Contractor</u></b>
Los Angeles – 14	<b>ACS Group</b>
Canyon Country – 3; Lancaster – 7	<b>Assert</b>
Taft – 3	<b>Garcia &amp; Sons</b>
Winnetka – 3; Chino – 5; San Gabriel – 4	<b>Reliable Energy Management Company</b>
Montebello – 6	<b>Richard Heath Associates</b>
Arvin – 2; Delano – 2; Lamont – 2; McFarland – 3; Shafter – 1; Wasco – 2; Bakersfield – 1; Mojave – 1; Rosamond – 1	<b>Staples and Associates</b>
Sun City – 6	<b>Synergy Companies</b>
Bellflower – 20; Rancho Cucamonga – 17; Upland – 12; Fontana – 9	<b>The East Los Angeles Community Union</b>

Through April, SoCalGas and its Energy Savings Assistance Program contractors treated 930 homes through WNA activities. SoCalGas continues to involve more Energy Savings Assistance Program contractors as well as external partners in the planning of future WNA events. For future reporting, SoCalGas will continue to monitor the resulting enrollments and measure installations completed through WNA efforts. In addition, SoCalGas is actively investigating marketing, outreach, and enrollment tactics as well as geographic and customer segmentation strategies that will help increase the number of households served by the Energy Savings Assistance Program program.

### **1.3. Energy Savings Assistance Program Customer Outreach and Enrollment Update**

**1.3.1** Provide a summary of the Energy Savings Assistance Program outreach and enrollment strategies deployed this month.

#### **Energy Savings Assistance Program Bill inserts/onserts**

There were no bill insert/onsert campaigns conducted in the month of April.



### **Energy Savings Assistance Program Direct Mailings**

No direct mailings were completed in April. However, results from a February direct mail campaign to Kings, Los Angeles, Orange and Ventura counties targeting SoCalGas residential customers show that 370 customers enrolled in the Energy Savings Assistance Program. The campaign generated over 48,000 personalized letters in English and Spanish to existing CARE customers in the following zip codes: 93230, 91335, 91405, 91402, 92804, 93257 and 93274.

### **Energy Savings Assistance Program Outbound Dialing**

There was one Automated Voice Messaging Campaign (AVM) launched in April to 31,889 residential CARE customers throughout SoCalGas' service territory. As a result of this campaign, there were 1,683 Energy Savings Assistance Program leads generated. SoCalGas will continue to use AVM campaigns throughout 2011 as another method to reach out and encourage customers to enroll in the Energy Savings Assistance Program.

### **Energy Savings Assistance Program Web Activities<sup>3</sup>**

In April, over 22,918 new SoCalGas customers received a welcome e-mail from SoCalGas. In addition to general information, the e-mail also included information about SoCalGas' assistance programs and encouraged customers to apply for Energy Savings Assistance Program's no-cost home improvements. For customer convenience, a direct link to SoCalGas' on-line Energy Savings Assistance Program request (lead) form was imbedded in the e-mail. As of April 30<sup>th</sup>, 1,490 customers completed on-line English Energy Savings Assistance Program request forms and one customer completed on-line Spanish Energy Savings Assistance Program request forms.

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<sup>3</sup> SoCalGas's website is designed to comply with W3C accessibility guidelines.

Additionally, an e-mail was sent to over 5,400 customers enrolled for the first time in SoCalGas' *My Account* program. Approximately 95% of those *My Account* customers were existing SoCalGas CARE participants and as such, are income eligible for Energy Savings Assistance Program services. *My Account* is SoCalGas' one stop, on-line service center specific to SoCalGas account holders. When a customer signs up for *My Account*, in addition to receiving and paying bills on-line, they can request to start, stop or transfer their gas service, request an appliance service appointment, fill out an on-line request for Energy Savings Assistance Program services and much more.

### **1.3.2 Customer Assistance Events and Public Affairs/Public Relations Activities for the CARE and Energy Savings Assistance Program.**

#### **4/08 – 4/09/2011 Los Angeles Zoo Event**

SoCalGas' representatives participated in the Los Angeles Zoo event on April 8 and April 9. The event drew over 16,000 people throughout the two day event. Information on CARE and the Energy Savings Assistance Program was available in English and Spanish and distributed to over 425 attendees.

#### **4/15 – 4/17 2011 Abilities Event at Los Angeles Convention Center**

SoCalGas attended the Abilities Event at the Los Angeles Convention Center on April 15<sup>th</sup>, 16<sup>th</sup> and 17<sup>th</sup>. The event drew approximately 5,000 people throughout the three day event. SoCalGas educated 500 disabled customers on CARE, Energy Savings Assistance Program and Medical Baseline. Many customers with children who are receiving Medi-Cal were surprised to learn that their households qualify for CARE and Energy Savings Assistance Program.

#### **4/05 – 4/29/2011 LA CARE Presentations**

SoCalGas' representatives participated in four presentations throughout the Los Angeles County area to customers enrolled in the LA CARE Medi-Cal program. SoCalGas presented information on its CARE, Energy Savings Assistance

Program and Medical Baseline programs to various audiences that ranged from 30 to 100. SoCalGas plans to continue nurturing a partnership with Los Angeles Care since the organization is the administrator for the Los Angeles County Medi-Cal program and customers participating in Medi-Cal can categorically qualify for SoCalGas' CARE and Energy Savings Assistance Program.

**4/18/2011 2011 National Lighting The Community Conference**

SoCalGas representatives attended the 2011 National Lighting the Community Conference established by Korean Churches for Community Development (KCCD). KCCD is a non-profit faith-based organization which serves as a bridge between the Asian American community and the greater community at large in connecting and creating private and public collaborations. Their mission is to maximize the capacity of Asian American faith-based organizations and other community non-profits to remove cultural, language and economic barriers by increasing their access to resources and funds in order to assist low-income individuals and revitalize neighborhoods. SoCalGas' Community Relations leader was a speaker at a workshop to educate Community Based Organizations on how to fundraise. The conference drew over 50 Community Based Organizations and many were faith-based who work with low-income customers.

**4/29/2011 Mexican American Opportunity Foundation – with the  
Los Angeles Department of Aging**

SoCalGas representatives attended the all-day event, which was located at the Los Angeles Braille Institute. Care givers of the elderly attended the event, and SoCalGas distributed material on its low-income programs to attendees.

#### **1.4. Leveraging Success Evaluation, Including CSD**

**1.4.1** Please provide a status of the leveraging effort with CSD. What new steps or programs have been implemented? What was the result in terms of new enrollments?

There are no updates from leveraging with CSD for the month of April. SoCalGas will continue to monitor discussions between the California Department of Community Services and Development (CSD), the California Public Utilities Commission (CPUC), and other utilities for closer collaboration and leveraging with CSD.

SoCalGas continues its efforts to meet with various municipal utilities that provide electric and water services to customers in SoCalGas' service territory to identify opportunities to leverage one another's low-income direct install programs in PY2011. SoCalGas and Riverside Public Utilities (RPU) are near completion on a working agreement whereby customers residing in both utilities' overlapping service territory would benefit from SoCalGas' Energy Savings Assistance Program services and from RPU's service offerings to low-income customers during the same visit. SoCalGas and RPU will continue their efforts to establish an agreement that best serves both utilities' low-income customers.

After undergoing an internal reorganization, Imperial Irrigation District (IID) has renewed the Energy Savings Assistance Program leveraging agreement for another year. SoCalGas received the updated contract from IID in April as well as an updated customer list for year-end 2010. Canvassing will begin in May.

In addition, SoCalGas and Burbank Water and Power (BWP) are ready to begin work on their Energy Savings Assistance Program leveraging agreement. Information sharing for this effort began in September and canvassing began

with a small pilot group in April. More extensive marketing and canvassing for the leveraged program will take place in May.

SoCalGas and Eastern Municipal Water District (EMWD) have completed a leveraging agreement where EMWD will provide a rebate to SoCalGas for every High Efficiency Clothes Washer installed within the two utilities' joint service territory under SoCalGas' Energy Savings Assistance Program. Initial installations under the signed agreement began in December 2010 and will continue throughout 2011.

SoCalGas has finalized details for the invoicing and billing of Energy Savings Assistance Program services for these leveraging partners and will begin billing for non-IOU measures approximately thirty to sixty days after the first installations occur.

## **1.5. Workforce Education and Training**

**1.5.1** 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.

The Commission's Workforce, Education and Training (WE&T) Pilot is being finalized between Los Angeles Trade Technical College (LATTC), SoCalGas and LATTC's industry partners Community Enhancement Services (CES) and The East Los Angeles Community Union (TELACU). LATTC has submitted their final report for review and the results of the WE&T Pilot, including the Northern California partners, will be published by the Commission. PG&E is the program administrator and has facilitated the WE&T pilot communication between the Northern and Southern California partners and the Commission.

SoCalGas provides two areas of training: 1) Enrollment and Assessment (E&A) and 2) Energy Savings Assistance Program Operations. The Year-to-Date results are shown in the following tables:

<b>SoCalGas Skill-Level Test Results</b>					
	<b>Jan</b>	<b>Feb</b>	<b>March</b>	<b>April</b>	<b>Totals</b>
Attended Testing	49	51	21	40	161
Passed Test	34	32	15	25	106
Pass Rate	<b>69.4%</b>	<b>62.7%</b>	<b>71.4%</b>	<b>62.5%</b>	<b>65.8%</b>

After successful completion of the Skill Level Test, the potential outreach specialist attends a mandatory 5-day class which reviews the requirements for enrollment, assessment and in-home education.

<b>2011 SoCalGas Enrollment and Assessment Training</b>					
	<b>Jan</b>	<b>Feb</b>	<b>March</b>	<b>April</b>	<b>Totals</b>
Attended Class	23	46	24	17	110
Passed Class	20	45	24	17	106
Badged	20	37	24	17	98
Census Attendees	3	4	3	3	13
Retention Rate	<b>87.0%</b>	<b>80.4%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>89.1%</b>

The 5 day class covers utility-specific items related to policies, security process and overall customer service standards as well as for 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

year-to-date total for registered outreach specialists for SoCalGas is 98. The classes are held at SoCalGas' Energy Resource Center located in Downey, California.

SoCalGas continues to see the participation of previous Census employees with its Enrollment & Assessment contractors for Energy Savings Assistance Program outreach. As of April 2011, there are a total of 13 previous Census employees who successfully attended and passed SoCalGas' outreach and assessment training.

SoCalGas field operations training includes initial training for new participants in weatherization, inspections, HVAC and NGAT. SoCalGas also provides refresher training primarily to address contractor issues and discuss new measures and procedures that have been implemented into the program. The table below shows the number of students that have attended class in 2011. The class sizes range from 5 – 35 technicians.

The year-to-date total for SoCalGas field operations training classes is 43 with 254 students in attendance.

<b>SoCalGas Field Training</b>										
<b>Class Type</b>	January		February		March		April		Total	
	No of Classes	No of Students	No. of Classes	No of Students	No of Classes	No of Students	No of Classes	No of Students	No of Classes	No of Students
<b>Initial</b>	6	16	7	40	8	53	9	28	30	137
<b>Refreshers</b>	3	16	0	0	3	21	0	0	6	37
<b>NGAT 5-Day</b>	2	17	2	26	2	27	1	10	7	80
<b>Grand Total</b>	11	49	9	66	13	101	10	38	43	254

## 2. CARE Executive Summary

### 2.1. CARE Program Summary

2.1.1. Please provide CARE program summary costs.

<b>CARE Budget Categories</b>	<b>Authorized Budget</b>	<b>Actual Expenses to Date</b>	<b>% of Budget Spent</b>
Outreach	\$3,785,932	\$854,814	23%
Proc., Certification and Verification	\$1,248,928	\$445,502	36%
Information Tech./Programming (1)	\$522,554	\$144,961	28%
Pilots (2)	N/A	N/A	N/A
Measurement and Evaluation	\$17,192	\$0	0%
Regulatory Compliance	\$236,919	\$83,955	35%
General Administration	\$604,963	\$207,037	34%
CPUC Energy Division Staff	\$171,500	\$23,273	14%
Cooling Centers (3)	N/A	N/A	N/A
<b>Total Expenses</b>	<b>\$6,587,988</b>	<b>\$1,759,543</b>	<b>27%</b>
Subsidies and Benefits (4)	\$135,901,649	\$53,854,359	41%
<b>Total Program Costs and Discounts</b>	<b>\$142,489,637</b>	<b>\$56,909,932</b>	<b>40%</b>

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

<b>CARE Penetration</b>		
<b>Participants Enrolled</b>	<b>Eligible Participants</b>	<b>Penetration rate</b>
1,736,826	1,847,383	94%



## **2.2. Outreach**

- 2.2.1.** Discuss utility outreach activities and those undertaken by third parties on the utility's behalf. (For additional CARE Outreach see section 1.3.2.)

### **CARE Telephone Enrollments and Recertification**

SoCalGas employs coordinated email and automated voice campaigns to contact customers whose eligibility is about to expire. During the April campaign, there were 6,623 CARE customers who were tagged for reminder. SoCalGas sent 2,044 e-mails that included a direct web page link so that the customer can certify online. The telephone campaigns are fully automated, and if the customer does not answer the automated phone call, the system leaves a call back message which includes an 800 number for the customer to utilize. 811 customers renewed their eligibility via the April telephone campaign.

### **CARE Web Activity & Enrollments**

SoCalGas promotes the CARE web site through collateral materials, web links, electronic newsletters. During selected months, mass media campaigns and public service announcements also promote the web site. During April, SoCalGas received 7,267 applications through the SoCalGas web site. These applications resulted in 2,943 new CARE enrollments and 1,575 recertifications. To enhance web outreach, SoCalGas also sends an email campaign to new customer who have provided their e-mail address and who are not already on the CARE program. In April 5,372 customers received this e-mail.

### **CARE Third-Party Enrollments & Outreach**

In April, SoCalGas' third-party, door-to-door outreach program enrolled 2,463 hard-to-reach customers, who for a variety of reasons had been non-responsive to other outreach methods. Additionally, as a result of an agreement between SoCalGas and 211 LA County, 211 continues to refer interested, potentially eligible callers to

SoCalGas' CARE program as well as promote CARE and other SoCalGas assistance programs at select events. During April, LA 211 attended 3 community events with an attendee audience of approximately 600.

### **CARE Direct Mail Activity and Enrollments**

During February, 2011, SoCalGas launched a direct mail campaign to 500,000 non-CARE, residential customers. The direct mail campaign targeted much of the overlapping service territory between SoCalGas and Southern California Edison (SCE). During the month of April, SoCalGas received 9,710 returned applications from the campaign for a net enrollment of 6,463. Since February, the campaign has generated 38,373 returned applications and a net enrollment of 23,387.

### **CARE Bill Inserts**

There were no bill inserts during April. The next bill insert will be the announcement of the revised eligibility guidelines this summer.

### **CARE Mass Media Campaigns**

There was no mass media during the month of April

#### **2.2.2. Describe the efforts taken to reach and coordinate the CARE program with other related programs to reach eligible customer.**

To ensure continued increases in CARE enrollments and retain customers already participating in CARE, SoCalGas shares customer information with other utilities such as SCE, SDG&E, PG&E, and LADWP. Additionally, CARE shares data with internal programs such as the Energy Savings Assistance Program and the Gas Assistance Fund. Coordinating the CARE program with other related low-income programs not only results in higher program participation rates, it also helps increase PEV activities when customer information is shared with programs such as LIHEAP. Since LIHEAP requires upfront proof of income and is a qualifying CE program, once CARE receives LIHEAP customer data, those customers are considered automatically eligible due to

CE criteria and their “pre enrollment verification“ is used by SoCalGas to meet CARE’s “post enrollment” income requirements.

During the month of April, 10,338 customers were enrolled in SoCalGas’ CARE program as a result of all internal and external data sharing activities.

### **2.3. CARE Recertification Complaints**

There were no CARE recertification complaints during the month of April, 2011.

## **3. Appendix Energy Savings Assistance Program Tables and CARE Tables**

**Energy Savings Assistance Program** - Table 1- Energy Savings Assistance Program Expenses

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

**Energy Savings Assistance Program** - Table 3- Energy Savings Assistance Program Average Bill Savings per Treated Home

**Energy Savings Assistance Program** - Table 4- Energy Savings Assistance Program Homes Treated

**Energy Savings Assistance Program** - Table 5- Energy Savings Assistance Program Customer Summary

**Energy Savings Assistance Program** - Table 6- Energy Savings Assistance Program Expenditures for Pilots and Studies

**Energy Savings Assistance Program** - Table 7- Whole Neighborhood Approach

**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 as of Month End