

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

Application of Southern California Edison
Company (U 338E) for Approval of its Energy
Savings Assistance and California Alternate
Rates for Energy Programs and Budgets for
Program Years 2015-2017.

And Related Matters.

Application 14-11-007
(Filed November 18, 2014)

Application 14-11-009
Application 14-11-010
Application 14-11-011

**ANNUAL REPORT ACTIVITY OF SOUTHERN CALIFORNIA GAS COMPANY
(U 904 G) ON LOW INCOME ASSISTANCE PROGRAMS FOR 2015**

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This report presents the results and expenditures for Southern California Gas Company (SoCalGas') California Alternate Rates for Energy (CARE) program and Energy Savings Assistance Program (ESA) for Program Year (PY)2015. The purpose of this report is to consolidate activity for the CARE and ESA Programs, and provide the California Public Utilities Commission's Energy Division (ED) with all the necessary information in analyzing the low-income programs.

Respectfully submitted,

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May 2, 2016



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

Annual Report

2015 Results

May 2, 2016

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 2015 (PY2015) in Phase II Decision (D.) 14-08-030 on August 20, 2014, which authorized a 12 month bridge period to fund the program through PY2015. This report provides information on SoCalGas' ESA Program accomplishments and expenditures for PY2015, the first year of the program cycle (2015-17).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 the LIEE Programs, like that of our non-LIEE Energy Efficiency Programs, is to provide cost-effective energy savings that serve as an energy

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

² SoCalGas also 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 with the Commission's ED and the other large energy Investor Owned Utilities (IOUs) as part of the charges of the mid-cycle working group established by D.12-08-044.

³ D.07-12-051 at p. 25.

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 (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 program years 2012-2014. SoCalGas continues to work towards meeting the CPUC directed ESA Program goals and objectives. Summary results for PY2015 are provided in Section 1.2

⁴ Id.

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 – 2015	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.	<ul style="list-style-type: none">• In 2015, SoCalGas deployed a conservation campaign to engage targeted low-income residents who were not enrolled in the ESA Program. The campaign was coordinated with the Advanced Meter project.• The Whole Neighborhood Approach (WNA) continued to be used from prior years. It is used to identify and reach targeted low-income customer segments. The WNA canvassing lists were delivered to ESA Program contractors as a means of targeting high probability customers in self-certification PRIZM⁵ codes. This type

⁵ 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 consumer's needs and consider a variety of factors, including income, preferences, lifestyles and purchasing behaviors.

Implementation Plan and Timeline		
Strategies	Mid Term 2012 – 2015	IOU strategy employed this program year
		<p>of information is of high value to ESA Program contractors and is used to streamline the ESA Program enrollment process.</p> <ul style="list-style-type: none"> • SoCalGas continued to use the ESA Program website page and interest form. It created an avenue that generated customer driven leads and allowed the customers to specify whether they are qualified 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. • Marketing campaigns such as direct mailers, bill inserts, and automated voice messaging (AVM) were effective. In addition, using information resources such as demographics and targeted zip codes for contacting various customer segments and educating them on the ESA Program. • SoCalGas utilizes newly enrolled CARE customer, and CARE rate transfer customer lists to deploy email campaigns. Customers on these two monthly lists have a higher probability to be eligible for the ESA

Implementation Plan and Timeline		
Strategies	Mid Term 2012 – 2015	IOU strategy employed this program year
		<p>Program.</p> <p>In PY2015, SoCalGas utilized social marketing:</p> <ul style="list-style-type: none"> • Deployed a bilingual (English and Spanish) residential communications campaign from June 1st through August 9th to increase awareness and drive enrollment participation in Customer Assistance Programs. This campaign targeted income qualified customers within the service territory, with an emphasis in Los Angeles counties. • Tactical execution includes outdoor advertising via bus interiors/exterior and geo-targeted gas pump ads, print ads in various multicultural publications, and online/mobile banners on Yahoo, LA Times, The Fresno Bee, and Caregiver Orange County.
1.2: Develop a recognizable and trustworthy Brand/Tagline for the programs.	<ul style="list-style-type: none"> • Launch integrated Energy Efficiency/ESA Program/Demand Side Management brand. 	<ul style="list-style-type: none"> • In 2015, SoCalGas coordinated integrated ESA Program and Middle Income Direct Install (MIDI) Program direct mail pieces that were delivered in partnership with cities in Western Riverside and with Southern California Edison (SCE). • All ESA Program marketing and advertising campaigns (collateral, giveaways, direct mail, email, etc.) include the ESA Program brand.

Implementation Plan and Timeline		
Strategies	Mid Term 2012 – 2015	IOU strategy employed this program year
		<ul style="list-style-type: none"> • The ESA Program made available polo shirts and t-shirts with the ESA Program brand. • The ESA Program logo is on other joint Investor Own Utilities (IOU) printed material (e.g., the Energy Education Guide, the Joint Property Owner Authorization Form). • In PY2015, ESA Program introduced vehicle magnets and decals to promote program contractors legitimacy.
1.3: Improve program delivery.	<ul style="list-style-type: none"> • Use information from segmentation analysis to achieve efficiencies in program delivery. • Leverage with Local, State, and Federal agencies as well as other organizations to increase seamless coordination, efficiency and enrollment. 	<ul style="list-style-type: none"> • SoCalGas continues to use PRIZM codes and delivers this information in Zip-7 lists (5 digit zip code plus the first two digits of the four digit extension) through its WNA efforts, which allows ESA Program contractors to reach geographically concentrated eligible customer segments. • SoCalGas Public Affairs representatives used their contacts to help promote the ESA Program to local, state, and federal agencies. • Community Based Organizations (CBOs) working with SoCalGas continue to utilize their intake processes to promote the ESA Program along with the other services they provide.

Implementation Plan and Timeline		
Strategies	Mid Term 2012 – 2015	IOU strategy employed this program year
		<ul style="list-style-type: none"> • SoCalGas maintained its water measure leveraging agreements with five water utilities. ESA Program water/gas conservation coordination includes sharing customer data and measure co-funding. <p>SoCalGas continued to maintain its leveraging agreements with Anaheim Public Utilities, Riverside Public Utilities and Pasadena Water and Power. These agreements provide joint customers the opportunity to reap the benefits of both programs with a single visit. The leveraging agreements also allow SoCalGas to continue to deliver the ESA Program to non-SCE customers and make progress toward treating all eligible customers by 2020.</p> <p>In 2015, SoCalGas held agreements to leverage funds with Park Water Company, San Gabriel Valley Water</p>

Implementation Plan and Timeline		
Strategies	Mid Term 2012 – 2015	IOU strategy employed this program year
		<p>Company, Fontana Water Company, Irvine Ranch Water District⁶, 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 (E&A) Workshops. • Leveraging with local government partnerships to help build program credibility to gain customer's trust. • In 2015 the IOUs updated the form to include authorization for the MIDI program. This allows common service providers between programs within the enrolling utility to complete one property owner authorization form when a customer does not qualify for the ESA Program. The form is in the process of being reviewed by the IOUs legal departments with an expected implementation of mid-year 2016.
1.4: Promote the growth of a trained Energy Savings Assistance Program	<p>Implement ESA workforce education and training.</p> <ul style="list-style-type: none"> • Coordinate 	<ul style="list-style-type: none"> • SoCalGas continued to provide ESA Program workforce education and training to its Contractor network by offering trainings and refreshers both in a formal setting at SoCalGas'

⁶ The Irvine Water District is an independent special district serving Central Orange County, California.

Implementation Plan and Timeline		
Strategies	Mid Term 2012 – 2015	IOU strategy employed this program year
workforce.	resources for training related to ESA Program needs to ensure delivery of ESA Program-trained resources to the program.	<p>Energy Resource Center (ERC) and at the Contractor's offices.</p> <ul style="list-style-type: none"> • To promote the growth of Outreach Specialists presentation skills in delivering In-Home Energy Education to program participants, SoCalGas developed a script to assist in the delivery of In-Home Energy Education. The script helps to standardize the education provided in customer's homes and personalize the message delivered based on the household composition. • SoCalGas coordinated resources to develop a cold water savings tips insert to include in the Customer Energy Education and Resource Guide. The insert was developed jointly with SCE to address the drought in California with program participants when they are receiving In-Home Energy Education. • To help the ESA Program maintain uniformity between providers and simplify the customer enrollment training, SoCalGas developed a joint Customer Agreement Form with SCE. The form captures all required fields for both utilities and minimizes a customer visit when the customer enrolled is in the utilities common service territory and the number of forms that need to be completed by Outreach Specialists. • SoCalGas provided forms training for E&A contractors in anticipation of implementing a joint SoCalGas and

Implementation Plan and Timeline		
Strategies	Mid Term 2012 – 2015	IOU strategy employed this program year
		<p>SCE customer enrollment form. This included four (4) trainings held at the SoCalGas ERC facility, and an additional two (2) trainings held at various contractor</p> <ul style="list-style-type: none"> • offices, and three (3) trainings for the SoCalGas Customer Assistance Representatives.

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 – 2015	IOU strategy employed this program year
2.1: Increase collaboration and leveraging of other low-income programs and services.	<ul style="list-style-type: none"> • Continue to expand partnerships with stakeholders and seek new opportunities for data sharing. 	<ul style="list-style-type: none"> • ESA Program uses data sharing with the CARE Program to target customers for ESA Program enrollment. <p>Additionally, customers who are ESA Program participants will be enrolled in the CARE Program when they have participated in the ESA Program and are not on CARE.</p> <ul style="list-style-type: none"> • SoCalGas and South Coast Air Quality Management District (SCAQMD) entered into a joint effort, via the ESA Program, to improve indoor air quality. This pilot

Implementation Plan and Timeline		
Strategies	Mid Term 2012 – 2015	IOU strategy employed this program year
		<p>term ran from June 2015 and will complete in February 2016, measures taken under this program include identifying homes that are at risk for exposure to high levels of localized criteria pollutants and Diesel Particulate Matter (DPM) emissions, conducting home assessments and weatherizing of homes along the freeway and the intermodal facilities will improve indoor air quality for the residents, minimize exposure to pollutants. The pilot focused on Boyle Heights in the city of Los Angeles and the entire city San Bernardino.</p> <ul style="list-style-type: none"> • SoCalGas' CARE and Programs have established a working relationship with the Asian Resource Center, a 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. • ESA In efforts to promote ESA Program, SoCalGas assisted its contractors with

Implementation Plan and Timeline		
Strategies	Mid Term 2012 – 2015	IOU strategy employed this program year
		<p>outreach whenever possible (WNA, providing collateral). In PY2015, SoCalGas invited ESA Program contractors to SoCalGas sponsored events where they shared the booth and were able to create leads for enrollments.</p> <ul style="list-style-type: none"> • See section 1.3 above on additional leveraging with water utilities.
<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 (IDSM) Single Point of Contact (SPOC) to reach and educate large housing portfolio owners and managers of low-income and general EE programs. The SPOC is a SoCalGas employee who is able to offer all eligible programs to the portfolio owners of low-income programs and non-low-income programs. Thus, the property owners are more inclined to adopt the programs since the representative is a SoCalGas employee. • SoCalGas has leveraged sponsorships of community

Implementation Plan and Timeline		
Strategies	Mid Term 2012 – 2015	IOU strategy employed this program year
		<p>events between the Customer Assistance and Advanced Meter Initiative (AMI) departments, and has taken opportunities to present ESA Program and CARE information at appropriate AMI community outreach events. SoCalGas participated in Community Forums with other utilities where AMI, ESA Program, and CARE material was presented to educate attendees on these programs.</p> <ul style="list-style-type: none"> • SoCalGas has teamed-up with a broadband provider and CBOs with computer resource centers to educate customers about how to get low-cost (and sometimes free) in-home internet access and how to utilize online resources including information about utility low-income programs on SoCalGas.com. This outreach should help prepare customers for new “smart⁷” energy technologies.

⁷ They are accessible assistive technology resources to assist individuals that have permanent disabilities such as vision impairments, physical limitations, and or cognitive disabilities.

Implementation Plan and Timeline		
Strategies	Mid Term 2012 – 2015	IOU strategy employed this program year
<p>2.3: Provide low-income customers with measures that result in the most savings in the Energy Savings Assistance Program.</p>	<ul style="list-style-type: none"> Assess opportunities to incorporate new energy efficiency measures into the ESA program, e.g., plug-load reduction, new Heating, Ventilation and Air Conditioning (HVAC) technology. 	<ul style="list-style-type: none"> SoCalGas continued to provide all feasible measures to customers' homes, these included 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 door and building envelope, SoCalGas assisted customers by increasing the health, comfort, safety of their dwellings, and reducing outside air infiltration. SoCalGas filed a 2015 – 2017 Low Income Programs Application which included a proposal for a new Tub Spout measure that SoCalGas wishes to introduce into the portfolio in PY2016. The measure is projected to provide energy savings and support water conservation.

Implementation Plan and Timeline		
Strategies	Mid Term 2012 – 2015	IOU strategy employed this program year
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. ESA Program staff also use John Peterson data, gap analysis, and low-penetration areas to target customers.

1.2 Energy Assistance Savings Program Overview

The SoCalGas ESA Program serves all eligible low-income customers, willing to participate in the program, by providing all feasible ESA Program measures⁸ as determined through outreach and assessment and the installation process. In PY2015, as SoCalGas continued to make progress toward achieving the goal of providing service to every willing and eligible customer by 2020, the ESA Program treated a total of 80,316 homes,⁹ which was 59% of the annual homes

⁸ See D.08-11-031, at Ordering Paragraph (OP) 15.

⁹ 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.

treated goal of 136,836 adopted in D.12-08-44 issued on August 30, 2012. Also in PY2015, 79,986 homes were weatherized.¹⁰

As part of its comprehensive services to eligible ESA Program participants, SoCalGas provided: In-Home energy education to 52,185 customers, 59,312 homes received envelope and air sealing measures, 5,091 attic insulation improvements, 78,157 Domestic Hot Water measures, 23,546 furnace clean and tune measures, 100 forced air unit standing pilot change outs, and 2,289 duct seal weatherization measures. In addition, SoCalGas provided and/or serviced 18,985 appliances including 1,146 water heater repair and replacements, 7,128 furnaces, and 10,711 high efficiency clothes washers. A total of 8,819 customers were classified as “ineligible” or “unwilling”¹¹ to participate in PY2015 which represents approximately 11% of the number of homes treated in PY2015.

The average per home lifecycle bill savings for the PY2015 ESA Program was \$118, Weatherization and measure installations resulted in energy savings of

¹⁰ Per 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.¹⁰ Ineligible & 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

¹¹ Ineligible & 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

Footnote continued on next page

1,565,091 therms. The energy savings achieved through the 2015 ESA Program will contribute to the CPUC's energy savings goals for program year 2006 and beyond as set forth in D.04-09-060. Furthermore, SoCalGas' ESA Program contributes to the CPUC's programmatic initiative.

On November 18, 2014, SoCalGas filed its Application for the Approval of Low-Income Assistance Programs and Budgets ("Application") for the 2015-2017 program cycle. Through the issuance of Phase II D.14-08-030 on August 20, 2014, the Commission approved continuation of the ESA Program as a 12-month bridge period for 2015, to be funded at the same levels as PY2014. The Phase II Decision also granted the general approval of budget augmentation requested through SoCalGas' Petition for Modification (PFM) of D.12-08-044.

ESA Program expenditures and therm savings for PY2015 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	%

requirement; customer is moving; over income; owner refused for renter occupied single family; unable to provide homeownership documentation; or home weatherized under another program.

Budget**	\$132,417,191	\$74,817,588	57%
Homes Treated	136,836	80,316	59%
Therms Saved	2,426,915***	1,565,091	64%

* Program Phase I D.12-08-044 was issued August 30, 2012, and was augmented pursuant to Phase II D.14-08-030 issued August 20, 2014; table reflects updated budgets and goals.

** Reflects authorized levels; does not reflect fund shift transactions.

*** Value shown represents the estimated energy savings for PY2014 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.

SoCalGas saw a decline in the number of homes treated in PY2015, reaching 80,316 homes compared to 92,967 the previous year.

SoCalGas continues to prioritize providing a positive customer experience as a core objective for the ESA Program. To help evaluate and manage customer satisfaction and program delivery, SoCalGas surveyed customers and developed quarterly reports regarding 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.

In PY2015, 53% of customers rated their overall quality of service as “excellent.” In addition, 62% rated their sign-up experience as “excellent,” 56% rated their installation experience as “excellent,” and 56% rated the inspection process as “excellent.” SoCalGas maintains its commitment to

work closely with its contractor network to drive program improvement and to pursue improvements to these customer service results.

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).

SoCalGas continued to use of Zip-7 codes (the five-digit postal zip code plus the first two digits of the four-digit zip code extension) methodology to target neighborhood enrollments in PY2015. 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 Research¹². In addition, SoCalGas continued to provide contractors with canvass lists utilizing PRIZM codes (as noted 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.

¹² Athens Research is a contractor that develops large and small area estimates of demographic eligibility on behalf of all the IOUs.

Contractors also received regular information updates at the ESA Program contractor meetings.

In PY2015, 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; households not yet served appear on canvass lists. Other useful information, such as a customers' CARE status, also appeared for the contractors' information.

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

SoCalGas continues to evaluate its strategy for targeting customers based on energy usage, energy burden¹³, and energy insecurity¹⁴. One methodology that SoCalGas continued to employ in PY2015 was WNA. In PY2015, SoCalGas conducted WNA efforts, reaching high energy burden customers without neglecting low income customers with other energy needs. SoCalGas also conducted WNA efforts to target low income areas using PRIZM code demographic information on households, which can be

¹³ Energy burden is the ratio of customer energy bills to income.

analyzed according to geographic social groups¹⁵ 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.

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.

Overall, SoCalGas' delivery strategy in PY2015 was consistent with PY2014. As described above, SoCalGas targets ESA Program customers using tools such as PRIZM codes and WNA, recently enrolled CARE contacts, and customers participating in other low-income resource programs. SoCalGas also uses demographics and segmentation to identify ESA Program customers to provide in-language and in-culture marketing and outreach.

In PY2015, SoCalGas purchased media advertising to reach many ethnic communities, and utilized ethnic-owned media as a means to effectively reach those customers.

¹⁴ Energy insecurity is related to late payments, and/or threatened service shut-off.

¹⁵ Urban, Suburban, Second City, Town and County.

In PY2015, SoCalGas spent approximately \$192,800 on ethnic media, with approximately \$51,100 of that paid ethnic media going to ethnic-owned media. Along with paid mass media and ethnic media advertising, SoCalGas participated in community events that drew the attendance of low-income customers and celebrated diversity in the community. In PY2015, SoCalGas participated in over 55 community events, some at no-cost to SoCalGas, that provided program awareness on the CARE and ESA Programs. In addition to events SoCalGas event specialist directly attended, regional public affairs and other community based organizations also attended events on SoCalGas' behalf. 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, Centro Latino for Literacy, 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 PY2015, Imprenta Communications assisted SoCalGas at the grassroots level by targeting underserved communities. 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.

Other valuable media that Imprenta Communications provided included was program promotion and awareness for SoCalGas on online newspaper websites that are popular among Asian customers. SoCalGas also used ethnic-owned media whenever possible to promote and market the ESA Program.

In PY2015, SoCalGas launched a new creative marketing campaign that targeted a key demographic, female decision makers. Since PY2004, our research has continued to support that in 2 out of 3 SoCalGas households, it is women who are the decision makers at home. The campaign images feature the mother as the household hero who finds ways to make the home more comfortable at no cost to her family with the help of the ESA Program. The headline on all ads read, “*SoCalGas can provide home improvements **at no cost to you***”. Below the headline readers learned about the type of home improvement measures they can qualify for such as weatherization by the authorized SoCalGas ESA Program contractors. The ad includes a unique URL: **socalgas.com/improvements** for customers to visit for more information on the ESA Program.

The efforts described above, for identifying and reaching ESA Program customers is the first step in the program delivery chain, raising customer awareness of the program. Additionally, SoCalGas implemented a variety of enrollment strategies to support program participation and ESA Program Contractor legitimacy. One of these strategies was to develop temporary badges for individuals waiting for their Home Improves Sales (HIS) Registration from the California State Licensing Board. The temporary “Observer” badges allows an individual to ride along with experienced Outreach Specialists and observe actual customer enrollments and assessments being performed. This training is invaluable for the Outreach Specialist as these real life scenarios prepare them for the job of enrolling customers into the ESA Program. A Scheduler badge allows individuals to canvass neighborhoods and set up appointments for registered Outreach Specialists. Schedulers are provided with program history, customer service and high lever program requirements training to assist them in answering basic questions when setting up the appointments. Both badges are valid for up to 90 days while individuals wait to receive their HIS registration from the California State License Board.

Another strategy was obtaining legal approval to update the ESA Program contractor badges to state “authorized contractor for SoCalGas”. This simple change helps validate the Outreach Specialist legitimacy when

approaching customers to promote the ESA Program. The language was also added to all installer and inspector badges, including ESA Program branded polo shirts and t-shirts.

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 80,316 customers in PY2015, 4,280 with (5.3%) of the homes treated considered “go backs.”¹⁶

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

In PY2015, SoCalGas continued to use Categorical Eligibility¹⁷ (CE) and self-certification¹⁸ as tools to streamline customer enrollments to the ESA Program. Both of these categories of eligibility decrease the required

¹⁶ Under the Statewide Low-Income Energy Efficiency 2013 Policy and Procedures Manual (P&P Manual), certain restrictions apply to homes that have been previously treated under the Energy Savings Assistance Program. Under Section 2.7 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.

¹⁷ 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

¹⁸ In D.05-10-044 the CPUC allowed SDG&E and SoCalGas to use 2000 census tract data to identify neighborhoods where they could suspend income documentation requirements enroll customers in the Energy Savings Assistance Program through self-certification, if those customers lived in areas where 80% of the households were at or below 200% of the federal poverty line. In D.06-08-025, D.06-12-038, and D. 08-11-031, the CPUC allowed continuation of the self-certification process described above

income documentation. With CE, customers who can provide documents validating participation in one of the state or federal programs do not need to provide additional income documentation in order to enroll in the ESA Program and/or CARE.

Categorical Eligibility:

SoCalGas' Public Affairs Department and Media Relations Departments continued to inform the public of ESA Program and its enrollment process and requirements. Media Relations issues an annual press release on the updated income guidelines and accepted CE programs. SoCalGas continues to provide the list of CE 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 increase awareness of all customer and home eligibility requirements for ESA Program. These courses addressed topics related to the various methods to income qualify households such as self-certification, categorical eligibility, CARE Post Enrollment Verification (PEV), or full documentation. The classes and other measure leveraging opportunities within income programs.

SoCalGas enrolled 11,081¹⁹ customers through the WNA in PY2015.

The WNA generated canvassing lead lists that are provided to ESA Program outreach contractors include the Zip-7 codes and the 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.

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 treated 80,316 homes in PY2015, equivalent to nearly 59% of the annual treated home goal of 136,836 for the 2012-2014 program cycle (the default annual goal as approval of a 12-month bridge period in Phase II D. 14-08-030 provided program funding at the same levels as PY2014).

The outreach and enrollment of new customers remains the main constraint preventing higher levels of production, as opposed to any lack of capacity to install weatherization measures. PY2015 results continue to

¹⁹ 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 PY2015.

demonstrate the challenge facing the ESA Program in reaching the remaining willing and eligible customer population and marks the third consecutive year of diminishing annual treated units since PY2013. SoCalGas estimates that nearly 72%²⁰ of willing and eligible customers within its service territory have been treated through PY2015 in combination with LIHEAP, resulting in a saturation of treated homes and a remaining population that is much harder to reach.

On November 18, 2014, SoCalGas filed its Application (A.) 14-11-011 for Low-Income Assistance Programs and supporting testimony for the ESA Program for years 2015-2017. This application, which is currently pending before the Commission, includes proposals designed to positively impact customer enrollment. In addition to the proposals made in its application, pursuant to the Assigned Commissioner's March 14, 2016 Ruling, SoCalGas has proposed supplementary enhancements in its comments to the ruling that would allow for the intensification of ESA Program activities. Program enhancements proposed in these filings include introduction of the thermostatic tub spout; increased coordination with SCE for joint-utility home enrollment; modification of the three measure minimum when treating multifamily homes; approval to return to homes previously treated

²⁰ Prepared Direct Testimony of Mark Aguirre and Hugh Yao at p.31

post-2002 to provide measures previously unavailable at the time of original weatherization and to replace measures that may have exceeded their effective useful life; and modification to the 80/20 rule allowing for streamlined enrollment of multifamily units.

In its pending application, SoCalGas also proposes an adjustment to the annual unit goal based on the assessment of progress relative to the 2020 goal and insights gained from the Low Income Needs Assessment (“LINA”) Study. Utilizing the established methodology adopted in D. 01-03-028 for estimating willing and eligible population, approximately 480,000 customers remained to be treated from 2015-2020. Although SoCalGas aims to aggressively enroll as many customers as possible, this methodology results in an annual treated figure of 80,000²¹ homes as sufficient to reach the 2020 goal. An adjustment to the total treated goal as supported by the LINA study is reinforced by SoCalGas’ enrollment contractor network and the experience of SoCalGas Customer Assistance Representatives (CARs)²², whose anecdotal evidence points to increased difficulty in identifying willing and eligible customers.

²¹ Prepared Direct Testimony of Mark Aguirre and Hugh Yao at p.15

SoCalGas strongly believes that the program enhancements and proposed modifications in its pending application will be a great help in facing the challenges of enrolling households.

1.5 Disability Enrollment Efforts

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

During PY2015, SoCalGas targeted enrollment for the ESA Program by partnering up with Medical Baseline (MBL)²³ and customers with disabilities²⁴ through a variety of approaches. They collaborated on bill inserts and community special events. SoCalGas also continued to partner with organizations that serve the deaf and disabled communities.

- Telecommunications Program (DDTP)²⁵ to cross promote the CARE and ESA Program in their Southern California Telephone Access Program (CTAP) locations in Burbank, Riverside, and Santa Ana. Additionally,

²² As authorized in D.12-08-044, CARs are 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 contractors

²³ The Medical Baseline provides additional gas at a lower rate for medically-qualified customers.

²⁴ SoCalGas customer service records on disability and age are captured in CIS. Customers self-identified as having a disability.

²⁵ This program is administered by the CPUC and provides assistive telephone devices in California Relay Service (CRS).

DDTP link is displayed on SoCalGas's website link
(Socalgas.com/assistance).

- In PY2015, SoCalGas continues its ESA Program bill insert with DDTP information for customers that use a Telecommunications Device for the Deaf (TDD or TTY technologies) to contact SoCalGas. The bill insert focused on the benefits of no-cost energy efficiency home improvements.
- In PY2015, SoCalGas attended the Abilities Expo at the Los Angeles Convention Center. The event drew about 10,000 people throughout the three day event. SoCalGas educated over 300 disabled customers on CARE, ESA Program, and MBL. Many customers with children who received Medi-Cal were pleased to learn that their households qualify for CARE and ESA Program.
- SoCalGas supported the Asian and Pacific Islanders with Disabilities of California Gala. The event was attended by 150 guests with interest in improving the lives of Asian Americans with mental, physical and developmental disabilities. SoCalGas informed guests of CARE, ESA Program, MBL, and included brochures in the Disabilities of California Gala's giveaway bags.

- In efforts to promote ESA Program to the disabled community, SoCalGas is working on building relationships with non-profit organizers that provide services for the disabled community. In PY2015, SoCalGas began partnerships with Fiesta Educativa, Santa Barbara Braille Institute, The California Council for the Blind, and The Lighthouse for the Blind in San Bernardino. Additionally, SoCalGas teamed-up with a broadband provider and CBOs with computer resource centers to educate customers about how to get low-cost (and sometimes free) in-home internet access and how to utilize online resources including information about utility low-income programs on the website (www.socalgas.com). This outreach strategy should help prepare customers for new “smart”²⁶ energy technologies.

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.

Braille booklets and large print brochures with ESA Program information were produced for vision-impaired customers. The Braille booklets and large print brochures were available to customers in both English and

²⁶ “Smart Technology” is a term used by disability and accessibility advocates to describe a new generation of technologies and appliances that provide alternate modes of access, such as speech output, large font, contrast color features, and mechanical tactile for household appliances. These new technologies assist individuals that have permanent disabilities such as vision impairments, physical limitations, and or cognitive disabilities.

Spanish. These booklets are available to customers during community events. To respond to the needs of customers with disabilities, SoCalGas continues to improve its website to increase 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 allows vision impaired customers who use screen readers and similar assistive technologies, to navigate the 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 information 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 Enrollment	Disability Enrollment	% of Disability Enrollment
Other	57	4	7.02%
Campaign	714	158	22.13%
Capitation	714	158	22.13%
CARE Referral	489	54	11.04%
CARs Referral	899	160	17.80%
Contractor –Outreach	1	0	0.00%
Direct Mail	1,126	205	18.21%
Energy Efficiency Referral	1,564	285	18.22%
Gas Bill Insert	366	84	22.95%
HEAT Canvassing List	2,167	313	14.44%
InfoLine211	18	6	33.33%

Joint Utility Data sharing	312	68	21.79%
Joint Utility ESAP SCE	280	47	16.79%
LIHEAP	88	24	27.27%
Media/Leveraging Dept./Event	131	32	24.43%
Municipalities	21	2	9.52%
Neighbor/Friend/Relative Referral	2,580	522	20.23%
Newspaper/Radio/Television	70	8	11.43%
Other Utility or Municipality Referral	3291	584	17.75
Outreacher – Cavassing	50,998	7,129	13.98%
Received services at another location	25	3	12.00%
REN Referral	16	1	6.25%
SoCalGas– GAF/Medical Baseline	36	4	11.11%
SoCalGas – Internet	473	75	15.86%
SoCalGas Referral	1,354	339	25.04%
SoCalGas Email	104	14	13.46%
Telemarketing – Telephone	5,683	1,095	19.27%
Univision – Telethon	29	5	17.24%
Whole Neighborhood Approach (WNA)	6,875	1,320	19.20%
WNA Census Self Certification	3	0	0.00%
Total	80,316	12,644	15.74%
Target Enrollment			15.00%

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

SoCalGas reached a 15.74% disability enrollment. SoCalGas implemented strategies to engage customers with disabilities to self-identify and meet a 15% penetration goal for the disabled community. SoCalGas approached the 15% disabled enrollment goal through the following efforts below:

- In efforts to improve the relationships with our disabled customers, In PY2015, SoCalGas hired a specialist to leverage relationships in the disabled community to better market the ESA Program. The SoCalGas

employee attended community events and presented ESA Program benefits to audiences with disabilities. These presentations are reasonably accommodated to meet the needs of the disabled attendees.

- SoCalGas increased disabled customer enrollments by working closely and coordinating with media staff when participating at events for persons with disabilities. 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 PY2015, ESA Program SoCalGas CARs employees continued to outreach in efforts to engage customer participation in the ESA Program. Of the 899 enrollments through CARs, 17 percent of participants enrolled by CARs were customers with disabilities.
- SoCalGas will continue to target customers participating in the Medical Baseline program through marketing campaigns, such as direct mail, AVM campaigns, and co-sponsorship of events for customers with disabilities.

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.

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 for additional details regarding leveraging and integration activities.

With continued emphasis on program collaboration and maximizing energy savings for water, electricity and natural gas, SoCalGas entered into agreements with key stakeholders such as Los Angeles Department of Water & Power (LADWP), Metropolitan Water District (MWD), SCAQMD, Eastern Metropolitan Water District (EMWD), Irvine Ranch Water District (IRWD) and others to provide a comprehensive approach to save energy and maximize customer participation and involvement.

In May of 2015, SoCalGas and MWD entered into a joint leveraging agreement for their overlapping service territories to co-fund HE clothes washers through 2017. This agreement has tremendous significance due to the size of MWD's customer base. MWD is a regional wholesaler that delivers water to 26 member public agencies: 14 cities, 11 municipal water districts, one county water authority – which in turn provides water to more than 19 million people in Los Angeles, Orange, Riverside, San Bernardino,

and San Diego and Ventura counties. Since May 2015, 3,383 HE clothes washers were installed with co-funding of nearly \$288,000.

SoCalGas maintained its water measure leveraging agreements with three investor owned water utilities, each co-funding HE washers. SoCalGas' three water IOU agreements are with Park Water Company,²⁷ San Gabriel Valley Water Company, and Fontana Water Company. SoCalGas also has leveraging agreements with two additional water districts. The agreement with the EMWD is to co-fund ESA Program shower heads (including thermostatic shower valves), faucet aerators, and HE washers. The leveraging agreement with IRWD²⁸ is to co-fund HE washers installed at joint customer households.

SoCalGas and Park Water Company first signed an agreement in PY2013 that continued in PY2015 to leverage water rebates for HE clothes washers stalled 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,

²⁷ Park Water Company serves the Compton/Willowbrook, Lynwood, and Bellflower/Norwalk water systems.

²⁸ The Irvine Ranch Water District is an independent special district serving Central Orange County, California.

SoCalGas collected over \$18,000 in Park Water Company rebates to offset ESA Program funding.

SoCalGas also leveraged with 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 HE clothes washers, showerheads and faucet aerators installed at joint customer homes under the ESA Program. Co-funding under this agreement in PY2015 provided the ESA Program over \$35,000. This leveraging agreement expired in June and was folded into the MWD effort to streamline HE clothes washers rebate processing to a single program. In addition, SoCalGas had continuing contracts with Fontana Water Company, IRWD and San Gabriel Valley Water Company to co-fund HE clothes washers. During PY2015, the ESA Program collected approximately \$50,000 in combined total cost to offset ESA Program costs.

Between the five water utility leveraging agreements, SoCalGas' ESA Program received \$103,000 in co-funding for HE clothes washers. These partnerships help the ESA Program extend the authorized level of funding to reach more customers.

SoCalGas' SPOC representatives coordinated with LADWP, Anaheim Public Utilities, and Riverside Public Utilities. ESA Program coordination with LADWP began in October 2015 with the Housing Authority of the City of Los Angeles (HACLA), a public housing program that provides affordable housing to more than 6,500 low-income families and manages 14 large public housing locations in Los Angeles. Since the inception of this collaborative effort with LADWP, 260 program enrollments have occurred along with 448 homes with the Anaheim Public Utilities, and 81 customers with Riverside Public Utilities.

SoCalGas and SCAQMD entered into a joint effort, via the ESA Program, to improve indoor air quality. This pilot will be completed in February 2016 and over one thousand homes have been treated. Measures under this program include identifying homes that are at risk for exposure to high levels of localized criteria pollutants and Diesel Particulate Matter (DPM) emissions, conducting home assessments and weatherizing of homes along the freeway and the intermodal facilities will improve indoor air quality for the residents, and minimize exposure to pollutant.

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 entered into a new contract for leveraging efforts with the Metropolitan Water District in PY2015. Within the SoCalGas service territory, the Metropolitan Water District of Southern California (MWD) is the largest wholesaler. MWD is a state chartered cooperative of 26 member agencies—cities and public water agencies—that serve about 18 million people in six counties. Due to the enormous connectivity of MWD and its water agencies, SoCalGas is able to effectively and efficiently integrate energy savings, both natural gas and water, through the installation of HE Clothes Washers. Working with MWD also streamlines the contract process of working with a SPOC for several hundred local water companies and agencies.

Leveraging with water utilities and districts and provides over 10,000 gallons per washer per year savings, and demonstrates SoCalGas support for statewide conservation efforts to address the water scarcity issues. HE Clothes Washers 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 (3MM) requirement. The LIHEAP framework resulted in 184 (leveraged enrollments in PY2015, compared with 162 in PY2015.

In PY2015, SoCalGas coordinated with CSD on marketing efforts with selected CSD contractors, e.g., Association for Energy Affordability (AEA) for Multifamily Low Income Weatherization Program (MFLIWP). The purpose of this coordinated effort with CSD and AEA was to offer the Energy Savings Assistance (ESA) Program to multifamily property owners.

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, ESA Program uses lists of all eligible CARE customers who have not received ESA Program services to target marketing campaigns. During 2015, SoCalGas ESA Program Outreach began a direct mail campaign that targets all new customers that were automatically transferred onto the CARE program. The reason for this campaign is that this segment of low-income customers have just moved into a new premise that may be eligible for ESA Program measures.

Integrated Voice Recognition (IVR):

Multi-lingual ESA Program and CARE messages are made available on the SoCalGas' main call center Integrated Voice Recognition (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 offered information on integrated programs 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.

Email Campaigns:

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

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 these programs.

Outreach by Field Employees:

Field service employees distributed Customer Assistance Programs flyers to customers when entering the customer's premises. This distribution occurs throughout the year. SoCalGas employees that entered customer homes left more than 430,000 flyers during PY2015.

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.

A strong effort was made in 2015 to integrate and coordinate ESAP with EE programs; SoCalGas has distinct program offerings, especially as it relates to multifamily programs; thus to appeal to multifamily building owners and streamline customer touchpoints, SoCalGas used a SPOC approach. As a coordinator, the overseeing of projects includes multiple resource programs being integrated; the SPOC is able to optimize activities.

The SPOC approach brings together the offerings of SoCalGas as well as its overlapping electric utility partners, including: the ESA Program, MIDI program, and traditional EE programs. A SPOC will make program referrals based on customer needs and qualifications. For example, when customers own low-income housing and are interested in our programs then the SPOC will make a referral to ESA Program contractors.

The experience from SPOC implementation during PY2015 is that building owners may not always want to participate in all programs. It is necessary to tailor offerings to meet the customer's needs. Therefore within the multifamily sector, it may be useful to have sub-sector SPOCs. For example, larger complexes with more common area space may have different energy efficiency goals compared to smaller building owners. Given these nuances, SPOCs may become experts of different multifamily housing subsectors.

For SoCalGas, the implementation of the SPOC concept will be the driving force behind well-managed coordination of funding sources for energy efficiency upgrades. The SoCalGas ESA Program contractors currently assess for the feasibility of measures in tenant units only. The SPOC approach may take a broader whole building perspective to assist building owners in identifying funding sources to supplement ESA Program in-unit upgrades. SPOCs will have expertise in bringing in the applicable funding sources and help guide customers through the participation process. Ultimately, building owners will be able to avail themselves of funding resources necessary to cover the costs of energy efficiency upgrades.

While SoCalGas' SPOC approach is focused on multifamily properties, the approach should provide valuable insights to assist CSD in integrating its Energy Efficiency and Renewable Energy Services. At its core, the SPOC

concept is a way to use an internal expert to streamline the customer process by selecting and making appropriate energy efficiency program referrals so that customer offerings best match customer needs. This approach does not merge programs, rather it focuses on improved coordination of programs to support tailored and comprehensive energy efficiency services.

An example of the success of the SPOC can be illustrated in the joint partnership between SoCalGas and the Los Angeles Department of Water & Power (LADWP). In 2015, the SPOC worked the major property owners, in particular, HACLA to identify program offerings that would best maximize the energy savings (water, natural gas and electric) for the customer. SoCalGas' program offerings included the Multifamily Direct Install Program that provides no-cost energy audits, measure installations for multifamily buildings. No-cost products include: showerheads, kitchen aerators, bathroom aerators, and pipe wrap for the hot water distribution system. Additionally, low income programs such as the Energy Savings Assistance Program along with LADWP electric measures are being offered to qualifying customers.

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.

Local Government Partnerships and ESAP coordinated with the City of Claremont regarding the City's participation in the Georgetown University Energy Prize (GUEP). GUEP challenges small- to medium-size towns, cities, and counties to rethink their energy use, and implement creative strategies to increase efficiency. To compete for the Prize, local governments, residents, utilities, and others will need to work together to demonstrate success in sustainably reducing energy consumption over a two-year period.

SoCalGas ' Local Government Partnership worked with city officials to provide aggregated energy data and energy efficiency guidance; while ESAP contractors targeted qualifying customers, both single family and multifamily, to participate in the Energy Savings Assistance Program. Additional energy efficiency program materials were distributed door to door by volunteers and numerous outreach programs were offered by the City of Claremont and Sustainable Claremont. Due to SoCalGas'

continued support and contribution to the success of this effort, Sustainable Claremont awarded SoCalGas as the Energy Partner of the Year in 2015.

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.

As part of the Integrated Demand Side Management directive and ESA Program multifamily strategy, SoCalGas' ESA Program expanded its outreach to MF building owners and managers to gain connections within the non-profit affordable housing marketplace. Please refer to section 1.7.2 for additional highlights.

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.

The California Solar Initiative (CSI) – Solar thermal pilot program concluded 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 PY2015, SoCalGas enhanced ESA Program workforce education and training by continuously improving the delivery of its enrollment and assessment (E&A) classes, In-Home Energy Education, and its customer enrollment forms.

All SoCalGas ESA Program services are provided by third party contractors, and the SoCalGas ESA Program contractor network includes both privately owned companies and CBOs who recruit employees from low-income communities. SoCalGas utilized CBOs and private contractors to provide program services, including enrollment and assessment, HVAC, weatherization, and inspection services, among others. SoCalGas continued to promote the growth of a trained workforce through its Contractor Network. SoCalGas provided an array of training including initial enrollment and assessment, Natural Gas Appliance Testing (NGAT), various refresher training, and HEAT database training -- all designed to provide thorough and technical training to its ESA Program workforce. While all training courses relay the importance of the utility-specific requirements and expectations for customer interactions to participants, each course supported the development of expert ESA Program

knowledge at all levels and stages, from front line to back office, and from newly hired to tenured personnel.

SoCalGas works with its contractor network to improve its E&A training by consistently seeking feedback on training requirements and curriculum.

Students who attend SoCalGas' E&A 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. As a result of constructive feedback on the topic, 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 "Knock Knock Scenarios" where students develop an approach for door-to-door canvassing and present it to the class. The scenarios help students adapt to different customer reactions and better prepare them to overcome obstacles when promoting and enrolling customers into the program. The exercise also presented a better hands-on understanding of what the potential Outreach Specialists can expect in the field once they are badged as SoCalGas ESA Program representatives.

SoCalGas was expedient in making curriculum changes and updates that resulted from any CPUC decision or studies. 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. In PY2015 SoCalGas developed a script to support the delivery of energy education to program participants. The script helps to standardize the education provided in customers' homes and personalize the message delivered based on the household composition. 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.

In support of addressing the drought in the state of California, SoCalGas worked with SCE to jointly develop a cold water savings tips insert to include in the Customer Energy Education and Resource Guide. The insert includes tips such as identifying and fixing leaking toilets and minimizing the use of lawn sprinklers to conserve cold water. In addition, SoCalGas worked with its children's activity book and energy wheel vendor to develop a unique shower timer to be provided to ESA Program participants at the time In-Home Energy Education is delivered. The ESA Program branded shower timer promotes shorter showers and reminds customers the importance of conserving energy. These enhancements allow the delivery of In Home Energy Education to have an even greater

impact during the enrollment process, and transform Energy Education into a more valuable and coveted component of the program. Not only do the new tools and material incentivize customers to participate, but they also cultivate and promote energy savings and conservation practices at a deeper level within the low income community. The shower timer and insert will be included with the Energy Education and Resource Guides distributed in PY2016.

As part of the ongoing effort to align processes between SoCalGas and SCE, the utilities worked together to develop a joint Customer Agreement Form. The customer agreement captures the required customer enrollment information for both utilities needed to process the enrollment in the respective utilities' database. By creating a joint enrollment form, dual utility Program Representatives working for joint contractors in the overlapping service territory are able to enroll the customer for both ESA Programs using one form thereby minimizing the amount of documents needing the customers signature and possibly reducing an additional customer visit. The form will be used to enroll all customers in joint and non-joint service territory starting in January of PY2016.

To ensure that all personnel receive the same training, SoCalGas and SCE also made strides in aligning all aspects of its processes by aligning fees, acceptable eligibility documentation, and energy education to

streamline the enrollment process and decrease duplicate documentation. SoCalGas and SCE established a baseline and sharing process for the aptitude testing of new Outreach Specialists planning to attend training. In addition, in 2015 SoCalGas and SCE's training personnel worked together to develop a joint utility energy education curriculum. The joint energy education curriculum is a new presentation for their In-Home Energy Education curriculum, covering all Commission mandated topics such as gas appliance safety, earthquake safety and proper Compact Fluorescent Lamp (CFL) disposal, amongst other newly added topics such as water conservation. By presenting the same information at both utilities' energy education curriculum, students who attend the SoCalGas Energy Education Workshop are not required to attend SCE's energy education. SoCalGas and SCE share the attending students information thereby reducing the amount of time students have to attend class. The joint energy education workshop will be implemented in January of PY2016.

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) E&A 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 for ESA Program customers as well as for program implementation. 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 the 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 assessment, enrollment, 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 3-day class which reviews the requirements for enrollment, assessment and In-Home energy education. 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, along with having an active Home Improvement Sales Registration with the California State Licensing Board, for an Outreach Specialist to be eligible to receive a SoCalGas badge. The total number of newly badged outreach specialists for SoCalGas in PY2015 was 135. The classes are held at SoCalGas' Energy Resource Center located in Downey, California.

During PY2015, SoCalGas did not identify any participation of previous U.S Census employees with its E&A contractors for ESA Program outreach.

Type of training or recruitment conducted	Students¹ attended	Students² eligible
Skill Level Test ³	215	142
Enrollment & Assessment Class ⁴	223	135
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 E&A Class. ⁴ Employees eligible refer to those individuals who received an ESA Program badge upon successful completion of the E&A Class.		

SoCalGas field operations training includes initial training for new participants in weatherization, inspections, HVAC and NGAT. Additionally, SoCalGas provides refresher training primarily 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 contractor 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 PY2015.

The table below summarizes field training efforts for PY2015:

Class Type	Number of Students	Number of Classes
Weatherization and HVAC Initial	73	21
Weatherization Refresher	393	40
NGAT	44	10

In an effort to improve program delivery, SoCalGas provides its E&A Contractors' back office support and processing staff training through Enrollment Workshops offered throughout the year. SoCalGas hosts the workshops at its ERC facility. There were a total of 467 workshop attendees, with participants from all 30 of the 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 proposed for the 2015-2017 ESA Program cycle. These included: (1) Low-Income Needs Assessment (LINA) study; (2) Impact evaluation of the 2015 ESA Program; (3) Phase II ESA Program Energy Education study; and (4) Non-Energy Benefits and Equity Criteria Evaluation. These studies have not yet been authorized. However, following direction of the Energy Division, the IOU's proceeded to bid out two time-sensitive studies in 2015: the Low Income Needs Assessment (LINA) study and the Impact Evaluation study. The LINA Study is mandated to be updated every three years per State code, and completed by December of 2016. The Impact Evaluation study is necessary as current ESA Program impacts are used for planning the next program cycle. This study is due sometime in 2017.

Table 1.10.1 provides an overview of the proposed 2015-2017 ESA Program Studies.

TABLE 1.10.1: 2015-2017 PROPOSED ESA PROGRAM STUDIES

Proposed Program Studies	Lead Consultant	Managing Utility	Project Initiation	Public Meetings	Final Report Due
Low Income Needs Assessment Study	Evergreen Economics	SCE	11/23/2015	1/28/2016	12/2016
ESA Program PY2015 Impact Evaluation	TBD	SCG	TBD	TBD	TBD
Phase II ESA Program Energy Education Study	TBD	PG&E	TBD	TBD	TBD
Non-Energy Benefits and Equity Criteria Evaluation	TBD	SDG&E	TBD	TBD	TBD

Joint Utility²⁹ Low Income Needs Assessment Study

Pursuant to the AB 327 requirement for a triennial needs assessment study, the Phase II D.14-08-030 requested the IOUs applications include a proposal for a Low Income Needs Assessment (LINA) Study including several key topic areas. The Low Income Needs Assessment is directed and overseen by members of the participating IOUs and Energy Division (ED). Southern California Edison (SCE) serves as study team³⁰ coordination lead and contract manager. The Energy Division serving as the overall lead on the project. An initial public workshop was initiated by SCE and conducted on behalf of the study team on May 13, 2015. The workshop included discussion of general topic areas included

²⁹ The Joint Utilities are Southern California Gas Company (SCG), Pacific Gas and Electric (PG&E), Southern California Edison (SCE) and San Diego Gas and Electric Company (SDG&E).

³⁰ The study team includes a member of each of the participating IOUs and Energy Division.

in the Proposed Decision of the Phase II D.14-08-030 Attachment Q of the “GUIDANCE DOCUMENT” and was intended to assist in developing the scope of work for the 2016 LINA study. A Request for Proposals (RFP) was developed following the workshop. The RFP was released on July 22, 2015 through a competitive bidding process. The contract was awarded to Evergreen Economics in October of 2015. Evergreen Economics activities conducted during November and December of 2015 focused on developing the research plan. A Public Meeting to discuss the Research Plan was held on January 28, 2016.

The overall study objective for the Low Income Needs Assessment is to provide information on the needs of the low-income customers eligible for ESA and CARE programs. The key topic areas to be examined in the 2016 LINA study are: energy burden and insecurity, beneficial energy efficiency (and other) measures, unique customer needs and income documentation.

The 2016 Needs Assessment is the third in a series of such studies required by CPUC Decision 14-08-030. The Final Report will be completed in December 2016.

Joint Utility 2015 ESA Program Impact Evaluation Study

The Impact Evaluation is a statewide study managed by SoCalGas. An RFP to perform the ESA Program Impact Evaluation was released on November 16,

2015. SCG is in the process of choosing contractor followed by developing a research plan.

The primary objective of this evaluation is to estimate first-year electric and gas savings and coincident peak demand reduction attributable to the 2015 ESA Program. The results are used to quantify the 2015 program achievements, document the relative value of various measures in producing energy savings, produce savings forecasts, and meet the filing and reporting requirements.

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.

No final reports were completed in PY2015, and SoCalGas paid no invoices in PY2015. The proposed Study Budgets are included in Table 1.10.2.

**TABLE 1.10.2: 2015-2017 PROPOSED ESA PROGRAM STUDIES:
BUDGETS**

Study	Lead Consultant	Managing Utility	Budget Proposed ¹	SCG Budget	% Expended
LINA Study	Evergreen Economics	SCE	\$500,000	\$125,000	7% ²
ESA Program PY2011 Impact Evaluation ³	TBD	SCG	\$550,000	\$137,500	NA
Phase II ESA Program Energy Education Study ³	TBD	PG&E	\$350,000	\$87,500	NA
Non-Energy Benefits and Equity Criteria Evaluation ³	TBD	SDG&E	\$150,000	\$37,500	NA

¹ This amount represents the total authorized Joint Utility study budget. The authorized Joint Utility budget split is: PG&E--30%, SCE--30%, SoCalGas--25%, and SDG&E--15%.

² This reflects what was spent during 2015 and includes expenses against the total statewide budget (not SCE portion only). The other IOUs have not been cross-billed for their portion

³ These studies were proposed in SoCalGas's 2015-2017 CARE-ESA Program Application and have not yet been authorized.

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 2015.

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 California Alternate Rates for Energy (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 (FPG)³¹. In PY2010, the legislature enacted SB 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 FPG. In PY2006, the Commission authorized the utilities to implement: 1) Categorical Eligibility (CE) which allowed customers to qualify for CARE based on their participation in certain state or federal public assistance programs; 2) four-year recertification for low-income customers with 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 Integrated Voice Recognition (IVR) system; and, 5) internet-based CARE enrollment and recertification.

³¹ D. 05-10-044.

In D.08-11-031 the Commission expanded the list of CE programs to align with the program-based eligibility programs adopted for the Commission's California Lifeline Program and established an enrollment goal for CARE at 90% of the estimated eligible population.

At the end of PY2015, CARE was awaiting approval of the 2015 - 2017 Application. SoCalGas updated its 2015 budgets to reflect a bridge year budget based on the Phase II Decision that authorized the 2014 budget per D.14-08-030. CARE was authorized for program years PY 2012 – 2014 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' PEV probability model to include more indicators, a process to review and update the list of CE 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 PY2015. At year-end of PY2015 the CARE Program had enrolled over 279,157 new customers and ended PY2015 with a penetration rate of 82%. SoCalGas continues to work towards meeting

the CPUC-directed CARE Program goals and objectives. Various results for PY2015 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-15	1,564,640	-0.21%
Feb-15	1,555,969	-0.55%
Mar-15	1,556,961	0.06%
Apr-15	1,562,481	0.35%
May-15	1,568,265	0.37%
Jun-15	1,564,499	-0.24%
Jul-15	1,563,296	-0.08%
Aug-15	1,558,172	-0.33%
Sep-15	1,556,125	-0.13%
Oct-15	1,562,709	0.42%
Nov-15	1,558,318	-0.28%
Dec-15	1,556,906	-0.09%

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

SoCalGas and the other California IOUs used the joint utility methodology adopted by the CPUC in D.01-03-028 for developing monthly penetration estimates in PY2015. This method entails annual estimation of eligibility

for CARE, the ESA Program, and other income-by-household size parameters at the small area (block group, census tract, ZIP+2, etc.) for each IOU territory and for the state as a whole.

The requirements for PY2015 eligibility, corresponding to the current estimation, again used the January Health and Human Services (HHS) Poverty Guidelines [Federal Register /Vol. 80, No. 14 /Thursday, January 22, 2015 /Notices; p.3237], “bundling” one- and two-person households at the HHS-defined 200% FPL limit as required by Assembly Bill (AB) 327.

Sources for the estimation include the current HHS guidelines, current year small area vendor marginal distributions on household characteristics, Census 2010 SF3 data, Census American Community Survey 2009-2013 Public Use Microdata Sample (PUMS) data, utility meter and master meter household counts, Department of Finance Consumer Price Index series, and various Geographic Information System sources. An important change has been implemented since 2011, which involves adjusting small area (block group) income distributions to match the latest American Community Survey distributions at the Public Use Microdata Area.

Estimates from the block group level are aggregated to county/utility and whole utility level, among other aggregations. Every quarter, SoCalGas

applies county/utility level eligibility fractions to a new set of “technical eligibility counts” (for CARE these are metered and sub-metered occupied housing units) obtaining an estimate of income/demographic eligibility in household count form.

Monthly, SoCalGas counts the number of households by county and overall enrolled in CARE. The CARE household total (by county), including individually metered and sub-metered occupied housing units, is divided by the total income/demographic eligibility.

A refinement in 2007 made use of Census Advance Query, PUMS, and SF3 tabulations to develop estimates specific to “payer types”: i.e., individually metered, sub-metered, and non-sub-metered master meters.

In PY2009, the method was augmented to better incorporate the impact of labor force changes (unemployment and other forms of job separation, as well as positive changes that are expected to occur in California subsequent to the recession). The method adjusted block group marginal distributions on household income based on sub-state modeling that incorporated Current Population Survey, Integrated Public Use Microdata Survey data, American Community Survey Data, and California Employment Department county and Metropolitan Statistical Area level

labor force series. This adjustment to block group income marginal is then incorporated into the otherwise “standard” estimation approach to produce small area estimates reflecting small area income changes due to labor market forces.

In PY2012, Athens Research developed an improved method for estimation of payer status-specific eligibility. This method took into consideration American Community Survey microdata relationships between guideline status (above/below 200 percent FPG), tenure, and fuel payment relationships. These cross-classifications are fitted to small area (block group) marginal to produce payer-type specific distributions, which can be aggregated to various other geographical levels.

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.

The joint utility methodology, as described above, was used throughout PY2015.

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 as the number of eligible residential meters for the CARE Program in the SoCalGas territory. CARE eligibility rates by small and large areas are developed so that they apply to individual residential meters and sub-metered dwelling units only. Non sub metered master meters and other meters that do not provide residential service are not included in the “technical eligibility” meter counts.

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

See response above to Section 2.1.2. 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 were developed. Note that the methodology is based on estimating small area (block group) level household size by income and householder-age tabulations for the current year and connecting these estimates with small area counts of households that are individually metered or sub metered. Block group/utility-specific estimates are then disaggregated/aggregated to various

geographic levels within a given utility area: zip+2, zip, tract, county, territory, etc.

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 PY2015, of SoCalGas' 5,486,054 CARE-eligible meters, 34.63% or 1,899,820 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 PY2015, SoCalGas had 143,627 sub-metered tenants in 1,808 master-meter facilities. Assuming, by the methodology described above, 55.14% of its sub-metered residential customers are eligible for CARE, SoCalGas estimates 79,192 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.

As of year-end of PY2015, SoCalGas had 37,271 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 47.06 % of its CARE eligible sub-metered tenants were enrolled in the CARE Program as of the end of PY2015.

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 PY2015, 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 (1)	Actual Expenses	% of Budget Spent
Outreach (4)	\$3,750,223	\$3,882,068	104%
Proc., Certification and Verification	\$4,488,248	\$1,138,810	25%
Post Enrollment Verification	\$3,744,000	\$129,028	3%
Information Tech./Programming	\$2,937,450	\$530,359	18%
Pilots (3)	\$183,600	\$167,700	91%
Measurement and Evaluation	\$18,659	\$0	0%
Regulatory Compliance (2)	\$242,507	\$396,549	164%
General Administration	\$943,426	\$726,496	77%
CPUC ED Staff	\$60,000	\$43,815	73%
Cooling Centers	N/A	N/A	N/A
Total Expenses	\$16,368,113	\$7,014,826	43%
Subsidies and Benefits	\$131,142,177	\$102,281,402	78%
Total Program Costs and Discounts	\$147,510,290	\$109,296,227	74%

¹ Pursuant to D.14-08-030, budgets have been updated to reflect the Phase II Decision authorized 2014 budget amounts for bridge year 2015.

² In August 2015, the Regulatory Compliance category budget has been increased by \$165,000 to \$407,507 from \$242,507. This increase is to fund necessary labor expense consistent with 2014 levels. Of the amount shifted only \$154,042 was needed. The shift is funded from the I.T. Programming category, decreased from \$2,937,450 to \$2,772,450.

³ CHANGES Pilot budget contains a 2% increase over the Phase II D.14-08-030 authorized 2014 budget amount of \$180,000 (per D.14-08-030, p. 81). SoCalGas notes that the total 2015 authorized budget number shown in D.14-08-030, Ordering Paragraph 2 does not contain the full escalation amount for Changes Pilot category.

⁴ In December 2015, the Outreach category budget has been increased by \$131,845 to \$3,882,068 from \$3,750,223 to fund Outreach efforts. The shift is funded from the I.T. Programming category, decreased from \$2,772,450 to \$2,640,605 which includes the August 2015 fund shift in footnote 2.

2.2.1 Please provide the CARE program penetration rate to date.

CARE Penetration Year-end 2014			
Participants Enrolled	Eligible Participants	Penetration rate	Target Met?
1,556,906	1,899,820	82%	No

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.

Month	Complaints Received	Nature of Complaint	Cases Resolved
January	1	Customer asserted that she never received the recertification application and did not receive the appropriate bill credits the following month. The customer was sent a recertification application, and the customer's bill was credited the appropriate amount for one month. The customer was satisfied with the explanation provided and the complaint resolution process.	Yes
March	1	Customer requested that SoCalGas send a second and third request for recertification, or include the language on the gas bill of the need for upcoming CARE recertification. SoCalGas does include bill message reminders. Also another recertification application was sent to the customer 45 days before he was removed from the program. SoCalGas explained this information to the customer and he was satisfied.	Yes
April	1	Customer called to notify that the recertification link on the SoCalGas website was not working. IT looked into the problem on April 6 th and concluded it was a server issue; the problem was fixed immediately. A CARE representative called the customer the	Yes

		same day and helped him with his recertification. Customer was satisfied.	
May	2	<p>“Customer suggested the CARE online form sent for recertification should have the address or customer of record name or account number on it to reference the account.” SoCalGas’ Communications Staff will add a sentence to the email recertification request template to remind customers to have their account number ready before filling out the online application, until an enhancement to prepopulate customer information is ready.</p>	Yes
		<p>“Customer received her CARE recertification and is suggesting to make the form more legible by making the circles darker because customer is visually impaired. Customer stated it was very hard to see the grey circles to fill in.” Customer was informed by SoCalGas she can also enroll using the IVR system listed on the application. The new recertification application has also been redesigned this year to make it easier to read. Also, she was informed there is a large font version available online to download. Customer was recertified and she was satisfied.</p>	
June	2	<p>Customer called because he did not receive a recertification letter and was removed from the program. A CARE representative recertified the customer and he was satisfied with the outcome.</p> <p>Customer called because he received a second recertification notice after being approved. Customer was informed the notice was sent around the same time the approval was processed. Customer</p>	Yes

		was satisfied.	
August	1	<p>Customer indicated receiving a recorded call regarding recertification, but experienced issues with the message and performing the online recertification process. SoCalGas staff checked both its recorded call and online systems, and confirmed that the processes were functioning.</p> <p>CARE customers who need to recertify their eligibility are mailed a recertification form and are called to remind them of the importance of responding to a recertification request. Despite customer's online recertification experience, customer mailed back his recertification form and was recertified for the CARE discount.</p>	Yes
September	1	<p>Customer attempted several times to recertify online on the SoCalGas.com CARE website, but was not able due to the absence of an image when asked to enter a security question. A security module is activated after customer has several unsuccessful attempts to access the website. The customer was contacted and recertified over the phone and was satisfied with the outcome and explanation.</p>	Yes
October	1	<p>Customer called to state that she received four reminder calls to renew her CARE eligibility and wanted to know how many times SoCalGas will call her. It was determined that there was a system error in how the outbound call file was created, and the customer's phone number was inadvertently applied to a second account. SoCalGas apologized</p>	Yes

		and explained to the customer that it was a simple system error. The customer was appreciative of the follow-up call.	
November	1	Customer stated that he mailed back the recertification letter in June 2015 but had been terminated from the program as of 8/26/15. The account was approved and rebilled on CARE effective 8/26/15. The customer was satisfied with the resolution.	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 PY2015 was \$ 6.17 ³² per month.³³

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

SoCalGas' CARE customers and expanded CARE customers (i.e. farm and migrant workers, and those living in non-profit group living facilities or agricultural housing) received \$99,929,685 in natural

³² The average monthly rate discount was computed by dividing the CARE rate discount recorded to the CARE balancing account in 2015 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.

³³ This number does not reflect the CARE customers who received a discount on their Service Establishment Charge (SEC).

gas rate discounts and \$2,351,717 in Service Establishment Charge (SEC) discounts in PY2015. The PY2015 annual subsidy for all SoCalGas CARE customers was \$ 102,281,402.

2.3.2 Administrative Cost

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

See section 2.2 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 SB 920 annual notification,³⁴ 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

³⁴ 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.

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 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 operation costs.

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.

Regulatory Compliance: These costs include labor and non-labor costs for the preparation and filing of various regulatory filings including: program applications, Advice Letter (AL) filings, comments and tariff revisions, preparation of monthly/annual reports and studies such as attendance at working group meetings, and public input meetings and other Commission hearings or meetings.

General Administration: This category includes costs for program management labor, office supplies, market research, and general business expenses.

Commission Energy Division Staff Funding: This category includes costs incurred by ED 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 PY2015, the CARE balancing account was over-collected by \$53,611,140.

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 limited English proficiency. The radio spots are short, 30 second Spanish language ads that run several times a day. In addition to the radio spots, SoCalGas's relationship includes periodic, on-air interviews. These interviews are in Spanish, and a SoCalGas representative is able to discuss low-income programs in greater detail.

During the summer, SoCalGas sponsored weekly lunches for farmworkers. SoCalGas representatives meet with farmworkers during their lunch break, and Radio Campesina broadcast live at the fields. Radio Campesina also hosted several "classrooms" of the month throughout the year. SoCalGas is invited to attend the classroom and

distribute branded SoCalGas “Low-Income Programs” giveaways and bilingual collateral.

SoCalGas also had an ongoing advertisements in a Spanish-language newspaper in Riverside (*La Prensa Hispana*). This is half- page add is in color. The year-round ad provided information on SoCalGas’s CARE Program to Spanish-language audience. Ethnic advertising is not a stand-alone concept, but is integrated into all communication campaigns. Therefore, mass media campaigns should also be viewed as ethnic outreach. In mass media advertising, the ethnic language component is built into the basic job requirement. In addition, SoCalGas’s relations with CBOS that help reach ethnic audiences.

Additionally, social media played an impacting role in mass media. Please see below “mass media”.

Mass Media: SoCalGas launched a mass media campaign (digital, ethnic newspaper, and radio) that ran from June 1st through July 26th. The campaign coincided with the publication of the new eligibility guidelines and targeted low-income communities in Oxnard, Ventura, Santa Barbara, and San Luis Obispo counties. The images and tone of the advertising was based on internal research suggesting that women, especially in low-income households were the primary decision makers for offerings, such

as the CARE Program. In analyzing the results from the digital advertising channels, Facebook both English and Spanish actually delivered the highest volume of digital traffic. SoCalGas observed a doubling of the click-through rate from the previous year.

In addition to the digital advertising, traditional advertising methods included: Spanish-language newspaper, Spanish and English language radio (twelve stations total), and out of home, i.e., advertising on buses, at gas stations, and at convenience stores. SoCalGas will be using the findings from the PY2015 campaign to improve its PY2016 campaigns.

A new media strategy that SoCalGas adopted in PY2015 was one through earned media. SoCalGas hosted four in language Media Roundtables. The roundtables were featured in Spanish, Vietnamese, Chinese, and Korean language. SoCalGas invited the in language media reporters to three local restaurant and one radio station in their community. In language SoCalGas employees discussed customer assistance programs available to customers. Following the discussion, media representatives were invited to ask questions. The event ended with SoCalGas employees having lunch side by side with the media representatives.

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. Most of the campaigns targeted existing customers with a probability of being eligible for the CARE Program based on attributes such as PRIZM code. SoCalGas also added systematic improvements to its direct mail campaigns. In addition to the targeted direct mail campaigns to customers that have a probability of being eligible for the CARE Program, SoCalGas sent out campaigns to new customers that have a probability of being eligible for the CARE Program. Additionally, SoCalGas continued to conduct its annual SB 920 targeted mailing (see Section 2.3.2.2. above) in its service territory to master-metered facilities with sub-metered customers in PY2015.

SoCalGas continues to maintain compliance with Assembly Bill (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.

In PY2015, SoCalGas launched an experimental campaign with recertification Direct Mail letters. The letters were sent to customers that had recently been dropped from the CARE Program due to not

recertifying. There were two versions of the letter. The first letter had the heading, “*THANK YOU FOR BEING A LOYAL SOCALGAS CUSTOMER!*”. The second letters heading read, “*YOU CAN AVOID LOSING MONEY BY REAPPLYING FOR CARE TODAY*”. The body of the letter has a tone of loss. It stated that they were previously on the CARE Program and had saved “X” amount of dollars, but unfortunately, were no longer going to receive the “*special discount*” since their application was out of date. The tone of the letter then changes to a positive one by informing the customer that they could still reapply. The chart of the income guidelines is included and steps needed to get back on the CARE Program follow. For their convenience, the application is also included in the mailing.

Bill Message: During PY2015, 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 the 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. In June, SoCalGas sent out a bill insert to approximately 3 million residential customers that were not on the CARE Program. The bill insert announced the annual eligibility guidelines. In September, SoCalGas also sent out a bill insert to 250,000 commercial customers. The latter bill insert described the CARE rate for commercial facilities, such as non-profit group living and migrant farmworker housing.

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. SoCalGas employees that entered customer homes left more than 480,000 flyers during PY2015.

SoCalGas.Com Website: The SoCalGas website (www.socalgas.com) is a regular component of communications. Monthly e-mail blasts, consisting of targeted electronic newsletters and e-mails promoting the CARE Program, direct the recipient to the SoCalGas.Com website. Customers can enroll in the CARE Program online using English and Spanish applications. Customers who are already on the CARE Program and who receive a reminder (email or letter) to recertify their eligibility are directed to the website where they may recertify online. The online applications are in English, Spanish, Chinese, Korean, and Vietnamese. SoCalGas also offers downloadable CARE applications in 13 languages: Arabic, Armenian, Chinese, English, Hmoob, Farsi, Khmer, Korean, Russian, Spanish, Tagalog, Thai and Vietnamese.

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 PY2015, 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. SoCalGas has been striving to use events and event sponsorships as leveraging points for further outreach in communities, and opportunities to work with other organizations so that residents and customers get good value out of attending. The events included Cultural Awareness with the Los Angeles Police Department, Sabadito Saludable, Tet Festival, Abilites Expo, Azteca TV Phone Bank, City of Santa Ana Cinco De Mayo Festival, and Kick Off for Summer Feeding Program North County.

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.

Community-Based Organizations (CBOs):

In PY2015, SoCalGas continued its grassroots outreach efforts.

The primary driver has been to establish relationships with faith-based organizations and CBOs in order to enroll hard-to-reach customers.

- **211 LA County:** Customer Assistance Programs and service information continue to be added to the growing California 211 information and referral network. 211 LA County provides social and support services to assist those in need, mainly low-income residents. SoCalGas works very closely with 211 LA County, so that the CARE Program is a key component of the operator's assessment of the caller's needs. During PY2015, SoCalGas continued working with these organizations, but also added several key partners to expand awareness.
- **Food Share:** In order to strengthen outreach with customers eligible for CalFresh, SoCalGas continued to work closely with FOOD Share, the regional foodbank for Ventura County. FOOD Share conducts ongoing grassroots CalFresh program outreach and includes the CARE Program awareness as part of its ongoing efforts.
- **Centro Latino for Literacy:** SoCalGas continued 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.

- **Los Angeles Opportunity Industrialization Center:** SoCalGas also sponsors computer education events that are conducted by the Los Angeles Opportunity Industrialization Center. These computer intensive sessions provide computers and computer education for low-income residents of Los Angeles at designated branches of the Los Angeles Public Library. CARE Program information is provided to all who attend.
- **St. Vincent Meals on Wheels:** 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.
- **Santa Barbara County Food Bank:** In order to expand awareness of customer assistance programs in the underserved areas of Santa Barbara County, SoCalGas initiated its relationship with the Santa Barbara County Food Bank. The Santa Barbara County Food Bank conducts ongoing CalFresh outreach in the county. Because participation in CalFresh allows customer

enrollment in the CARE and ESA Programs through categorical eligibility, SoCalGas began working with the food bank (This relationship is similar to the relationship is similar to the relationship with FOOD Share in Ventura County, described above.)

- **Unity Shoppe:** SoCalGas began working with Unity Shoppe, a CBO in Santa Barbara County. The organization serves low-income families, children, seniors, and persons with disabilities. Since each person served undergoes an assessment process by the organization, it is an opportunity to increase awareness of the SoCalGas Customer Assistance Programs.

Capitation Contractors: SoCalGas worked with 40 different CBOs and outreach agencies to enroll eligible non-participating customers in the CARE Program during PY2015. 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.

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. The largest source of enrollments came from paper applications that customers requested from SoCalGas

and then subsequently returned. Many forms of outreach and advertising may go into the decision a customer makes when requesting a CARE application from SoCalGas, which reinforces SoCalGas' use of awareness channels, such as mass media and outreach with CBOs. The second largest source of enrollments from web enrollments . Through all media communications, customers are directed to sign up for CARE through the website www.socalgas.com. The third largest source of enrollments came from direct mail. One advantage of direct mail *vis à vis* mass media is that direct mail includes a specific source code on the returned application that allows CARE operations to track the enrollment source. Even with direct mail, the reinforcement provided by other awareness channels may play an important role. Thus, SoCalGas tracks individual channels where possible, but also views various methods as inter-connected and mutually reinforcing. Door-to-door canvassing represented the fourth largest channel for enrollments in the CARE Program.

Technology continues to play a large role in awareness and outreach. Social media sites such as Facebook generate "click-throughs". Web enrollment and email-prompted Web enrollment are already significant contributors to participation. SoCalGas plans to maintain traditional channels, fine tune the effectiveness of traditional channels, and continue to pursue technological approaches.

Listed below are the primary tactics used during PY2015:

Bill Inserts: SoCalGas sent out over 3 million CARE self-mailer bill inserts during PY2015. As discussed in section 2.4.1, SoCalGas sent out one residential bill inserts (approximately 3 million in June). In September, SoCalGas also sent out a bill insert to 250,000 commercial customers. Bill inserts continue to be a significant, but declining channel for enrollments. Approximately 4,900 bill insert, self-mailer applications were returned in PY2015, resulting in approximately 3,322 customers enrolled into the CARE Program.

Capitation Program: As described in Section 2.4.1, SoCalGas worked with 40 different CBOs and outreach agencies to enroll eligible nonparticipating customers in the CARE Program during PY2015. 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.

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.

During PY2015, SoCalGas sent out approximately 1.1 million direct mail pieces. SoCalGas received 48,000 direct mail applications, and 34,885 customers were enrolled in the CARE Program.

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. During PY2015, approximately 34,600 customers were enrolled by this method.

Community-Based Organizations/Faith-Based Organizations:

SoCalGas has been increasing its collaboration with community-based and faithbased organizations. These organizations are crucial parts of our relationships to enhance awareness and trust among all customers, especially 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. As digital and social media channels have become basic components of mass media awareness campaigns. In PY2015, SoCalGas received 81,400 applications through the internet, and 46,100 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 continue in to PY2016, it is challenging to optimize the direct mail campaigns.

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, one cannot blanket a particular zip code or county and hope for cost-effective returns. SoCalGas continues to fine tune its targeting, but the issue of literacy continues to be raised anecdotally (through in-person calling campaigns and from varieties of CBOs that provide feedback on their communities). Thus, even a perfectly targeted direct mail piece will not guarantee a successful return. SoCalGas has noted this and will look

for ways to send out less text-heavy communication. As a partial mitigation of literacy challenges, SoCalGas has begun to (and will continue to in PY2016) to coordinate direct mail campaigns with door-to-door canvassing.

The direct mail piece provides context for the canvassers, and the canvassers can bridge the cognitive gap for customers with literacy challenges. The literacy challenges also contribute to SoCalGas's ongoing work with Centro Latino for Literacy, an organization that provides assistance to non-literate adults near downtown Los Angeles.

Literacy challenges and general hardship may contribute to customers who fail to respond to a request to recertify their eligibility. In PY2015, SoCalGas added more than 205,000 CARE enrollments. During that same period, more than 111,000 customers failed to recertify. Timely recertification is an ongoing challenge. During PY2015, SoCalGas addressed this problem by sending out a second reminder letter to customers, and accompanying those letters with automated phone calls. To address the customers who nevertheless fail to reply, SoCalGas initiated a campaign to send letters to those customers that had failed to recertify. SoCalGas tested the effectiveness of several different "messages," and based on those results, letters have been modified.

SoCalGas will continue to test its messages. In PY2016, SoCalGas plans to deploy letters that are less text heavy.

SoCalGas is also working increasingly with its partners in the community to use existing computers as opportunities to guide customers in the enrollment process. Online sign ups played a key role in several outreach events, and this approach is expected to continue and increase in PY2016.

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.

Customers who do not participate in SoCalGas' CARE Program, but are enrolled in other utility (e.g., electricity provider) CARE Programs, are automatically eligible for SoCalGas' CARE Program. To ensure that eligible customers in overlapping territories receive all discounts they are eligible for, SoCalGas exchanges its CARE customer data with SCE and SDG&E. In PY2015, SoCalGas exchanged CARE customer data with SCE and SDG&E. SoCalGas customers enrolled through data-sharing are mailed a letter notifying them of the enrollment, and are provided the opportunity to opt-out of SoCalGas' program if they choose.

SoCalGas continued to electronically exchange new CARE customer enrollment data on a weekly basis with SCE, a process established in 2001. In PY2015, SoCalGas brought 47,775 SCE CARE customers into

SoCalGas' CARE Program. Customers not enrolled were either already participating in SoCalGas' CARE Program or were not SoCalGas customers.

During PY2015, SoCalGas conducted three data exchanges with SDG&E. The exchanges resulted in 293 SDG&E CARE participants being added to SoCalGas' CARE Program.

Joint Utility Program Manager's Meeting:

In PY2015, SoCalGas, SCE, PG&E, SDG&E, South West Gas and Sacramento Municipal Utility District (SMUD) continued to meet periodically to discuss CARE outreach efforts and program issues.

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 PY2015, SoCalGas continued cross-referencing customers who receive ESA Program benefits. Customers who are receiving 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 PY2015, SoCalGas automatically enrolled 19,352 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 GAF program typically begins in February and continues through the end of May, or until funds are depleted.

Because the GAF Program has the same income eligibility 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 PY2015, SoCalGas enrolled 988 new participants in its CARE program.

In PY2015 the GAF program provided approximately \$429,000 in customer assistance. Funds for the program came from donations from customers, employees and Shareholders.

PY2015	Shareholder Funded Distribution	Ratepayer Funded distribution	Total YTD
Beginning Balance	\$5,830.00	\$0 ⁽¹⁾	\$5,830.00
Customer & Shareholder Contributions	\$473,481.00		
Total Funds Available	\$479,311.00		\$479,311.00
Administrative Fees ¹	\$40,218.00		\$40,218.00
GAF Payments			\$429,653.00
Remaining Balance	\$3,609.00	\$0	\$3,609.00
Customers Assisted			\$4,808
Average Assistance			\$89.00

¹ There were no Ratepayer Funds used in PY2015.

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).

In PY2015, SoCalGas was instrumental in collaborating with the national project of affordable Broadband known as EveryoneOn. This initiative works towards narrowing the digital divide for the low-income population by providing affordable rates for in-home internet service. SoCalGas and EveryoneOn outreach teams decided that they would educate and disburse one another's information at outreach events. As a result, EveryoneOn customers learned about not only affordable broadband, but also about CARE and ESAP. In turn, potential SoCalGas CARE and ESAP customers learned about the EveryoneOn program.

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

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

For PY2015, 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. For LIHEAP recipients, SoCalGas has an automated process in place that automatically PEV approves an account once a LIHEAP payment is posted to the account. Similarly, regarding GAF, once a GAF pledge is

placed on an account, the customer is automatically PEV approved for CARE.

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. In PY2015, SoCalGas approved over 46,141 customer applications from its website, which maintained program cost-effectiveness and efficiency. SoCalGas will continue to promote and support CARE enrollment and recertification through the SoCalGas website.

SoCalGas processed nearly 363,000 mailed applications (system generated, direct mail, bill inserts) in PY2015 via document scanning and data validations, with approximately 2 percent of those requiring manual data entry. SoCalGas continues to scan and electronically maintain all customer-returned documents for ease of processing and retrieval on its network. This improves program delivery when customers call with CARE inquiries and issues. The CARE processing staff can easily retrieve the customer application and respond accordingly.

Pending Customer Accounts: In September, an enhancement to SoCalGas' Computer Information System (CIS) was implemented which allows for pending CARE statuses (e.g. approved, incomplete, denied) on accounts that are pending turn-on. Prior to the enhancement, only active bill accounts could be approved for CARE; a customer with a new account in pending turn-on status could not be CARE approved.

Currently, processing a CARE application via batch, online, or IVR – is automatic without manual intervention, once the account becomes active.

The new process eliminated the need for the CARE processing staff to solicit assistance from SoCalGas' Billing Department which previously monitored pending turn-on accounts, and had the responsibility of manually approving CARE, once the accounts became active. The enhancement has expedited the processing of CARE applications, reduced labor intensive work, and has provided improved customer service by allowing customers to receive the CARE discount as of their initial bill.

Of added benefit has been increased enrollment through SoCalGas' weekly data exchange with SCE, as the pending approved status is now applied to accounts that are pending turn-on. Prior to the enhancement, the data exchange took place only on active accounts. The actual

accounts pending turn-on, were unknown, and therefore, not captured as viable or future enrollments.

SoCalGas continues to review CIS to improve its functionality in enrolling customers quickly and efficiently and in making enhancements to further improve its already outstanding customer service.

PEV-Terminated Customers: Implemented in PY2014, and continued through PY2015, has been the practice of out-bound calls to landline telephones to customers who are mailed a PEV request. The automated message alerts the customer that it is time to verify eligibility for CARE and to be aware that a request will arrive within a few days. The message states that proof of income or proof of participation in an assistance program is required and also describes the consequences of not returning the completed application – removal from the CARE program and termination of the 20 percent discount. If the call is answered, the customer can select to hear the message in either English or Spanish. If the message is left on the customer's answering machine, the information is delivered in both English and Spanish.

Non-responsive customers are terminated from CARE. Within twenty-four months from PEV termination, customers must submit proof of income or proof of participation in a specific assistance program to become re-enrolled. When twenty-four months from PEV termination have lapsed,

customers can get back on the program by simply completing a self-cert application.

In PY2015, plans began for automatic mailing of a 2nd PEV application to customers who have not responded within 45 days to their first verification request. Although originally slated for implementation in 2015, the 2nd notice was put on hold due to the CPUC PD of A.11-05-017. The PD is explicit in not approving any aspects of the 2015-2017 proposals.

Bill Messages: Customers who do not respond to a PEV request within 45 days receive a bill message reminding them to send their application and documents proving their eligibility. To improve communication with its customers, SoCalGas recognized the need to create the bill message in Spanish, as well as in English. In January PY2014, the dual message was implemented and customers began receiving the reminder message on their bills in both English and Spanish.

2.5 Processing Care Applications

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

Recertification of sub-metered tenants of master-metered customers is the same process as that of regular residential customers who are recertified every two years, with the exception of customers on a fixed-income. The annual earnings of customers on a fixed-income do not fluctuate

significantly from year to year, and requiring them to recertify every two years was an unnecessary burden. In PY2008, as authorized by the CPUC in D.06-12-038³⁵, SoCalGas implemented a four year recertification period for customers receiving Social Security, pension, SSI, Social Security Disability (SSD), State Supplemental Program (SSP), and/or Medi-Cal benefits.

Recertification applications are mailed directly to the sub-metered tenants when they are due to recertify. Each application is pre-populated with the tenant's name, facility identification (ID) number, unit address, and space or apartment number. Pre-population of applications was designed for tenants' simplified CARE renewal, ease of processing completed applications, and to aid in reducing attrition of CARE customers.

Several options for completing the recertification process are listed on the recertification application: 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 Program staff. Recertification requires the tenant to provide the number of household occupants, annual income from all residents, or participation in a public assistance program.

³⁵ D.06-12-038.

Applications received via U.S. mail are opened, scanned, and validated for processing efficiency. Tenants are allowed 90 days to respond to the recertification request. If the recertification is received and approved 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 ensures proper recordkeeping and appropriate billing of 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. SoCalGas processes and approves all CARE enrollment applications, recertification forms, and verification requests internally. Additionally, SoCalGas utilizes LIHEAP, ESA Program, and GAF participant information to enroll, recertify, and

verify CARE eligibility. SoCalGas also utilizes SDG&E and SCE CARE participant information to enroll customers.

In PY2015, SoCalGas contracted with 40 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 the customers in enrolling in other programs they might be eligible for.

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. Many of the customers targeted by the third party CARE contractor do not respond to traditional forms of outreach, nor visit CBO facilities, and are much more receptive to door-to-door canvassing efforts.

During PY2015, the number of customers enrolled in CARE by SoCalGas’ CARE Capitation CBOs was 22. Almost 40,000 new enrollments were derived from CARE’s third party canvassers 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 PY2015.

2.7 Pilots

2.7.1 CHANGES Pilot Program

In D.12-12-011 (CHANGES Decision) the Commission approved the continued funding for the CHANGES Pilot Program³⁶ 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 to facilitate and improve the tracking, monitoring and oversight of the CHANGES Pilot Program efforts

³⁶ 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 for one-year. 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.

consistent with the directives provided in the CHANGES Decision and D.12-08-044. 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 effectiveness of the CHANGES activities, relating to the CARE Program, in furthering the CARE Program objectives. In August 2014, D.14-08-030 extended the pilot and continued funding through 2015 to allow time for the CPUC to decide if the pilot should become an ongoing program. In D.15-12-047, the Commission approved CHANGES as an ongoing statewide program, effective January 1, 2016. The ongoing CHANGES program will provide outreach, education, and bill issue assistance on natural gas, electricity bills and services to limited English proficient consumers in the language of their choice through a statewide network of community based organizations. CHANGES will be managed by the Commission's Consumer Service and Information Division, with technical assistance and input from the Energy Division.

Pacific Gas and Electric Company, San Diego Gas & Electric Company, Southern California Edison and Southern California Gas Company (Joint Utilities), received data throughout PY2015 and included it in monthly reports due on the 21st of each month.

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 18,146 residents in the non-residential CARE Expansion Program facilities. There were 398 primary facilities with 692 associated satellite facilities participating in the CARE Expansion Program at PY2015 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).

For PY2015, SoCalGas incurred \$4,875 in outreach expenses for the CARE Expansion Program bill insert. By staying within the overall envelope weight, this bill insert did not incur incremental postage costs. Compared to the residential bill inserts (approximately 3 million per

insertion), the 330,000 bill inserts applications that are sent out in this campaign are comparatively modest. Because of the low volume, SoCalGas did not track administrative labor costs for new CARE expansion applications received during PY2015.

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 PY2015 was \$ 65.20³⁷.

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 facility in PY2015 was \$ 385.16.³⁸

³⁷ Average annual discount is dependent on the sales and transport gas revenue as well as the number of CARE customers by climate zone.

³⁸ 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 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 PY2015, 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.

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 330,000 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 PY2015, SoCalGas continued to work closely with Radio Campesina, which has Spanish language radio stations in both Visalia and Bakersfield. SoCalGas also participated in several “Classroom of the Month” events that allowed SoCalGas to promote awareness of SoCalGas to school children, who can be primary cultural navigators in mono-lingual Spanish speaking homes.

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

In December 2015, SoCalGas reported strong eligibility in the “rural eligible” customers of Kern (96%), Kings (91%), Fresno (98%), San Bernardino (91%), and Tulare (94%). As discussed previously, SoCalGas’ presence in these rural communities is ongoing and continually disseminated and reinforced by trusted community organizations. These relationships are planned to continue and increase in PY2016. Certain tactics, such as door-to-door, are non-existent in the rural communities, as they are not as densely populated, but direct mail did reflect significant enrollments in these three counties. Because hard-to reach customers have challenges with language and/or comfort with institutions, SoCalGas has continued its relationship with Radio Campesina. In addition, in PY2015, the CCC continued to be an effective outreach method for 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 sharing during PY2015.

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 is not aware of barriers to participation in PY2015 requiring adjustments in PY2016. Applications were processed within a few days of receipt promptly. Incomplete applications were followed-up with a phone call or 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 and customer friendly. Applications are processed in a timely manner and within a few days of receipt. 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 the accounts that are due to recertify, every two years. Correspondence, containing a recertification application, postage-paid envelope and an instruction letter is mailed to the facilities. Among other directions, the letter states that the facility must include a short statement specifying how the CARE savings were used to benefit the residents at the facility. The facilities are familiar with this routine and submit what is asked of them.

Additionally, the CCC and Billing Department notify the CARE Department of new Expansion Program accounts, both non-profit and agricultural group living facilities. A CARE application is proactively mailed to these accounts. Plans to automate these notifications, in the form of a weekly file, are being discussed. The file will contain new accounts at facilities where the prior account was participating in the CARE Expansion

Program. CARE applications will be mailed to these newly established 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 PY2015.

4. FUND SHIFTING

4.1.1 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 PY2015 is in compliance with fund shifting rules as laid out in D.12-08-044.

COMMONLY USED ACRONYMS

A	Application
AB	Assembly Bill
AMI	Advanced Meter Initiative
AVM	Automated voice messaging
CARE	California Alternate Rates for Energy
CARs	Customer Assistance Representatives
CBO	Community Based Organizations
CE	Categorical Eligibility
CHANGES	Community Help and Awareness with Natural Gas and Electricity services Pilot Program
CPUC	California Public Utilities Commission
CCC	Customer Contact Center
CSD	California Department of Community Services and Development
D.	Decision
DDTP	Telecommunications Program
DSM	Demand Side Management
E&A	Enrollment & Assessment
EE	Energy Efficiency
FPL	Federal Poverty Level
FPG	Federal Poverty Guidelines

GAF	Gas Assistance Fund
HEAT	Home Energy Assistance Tracking
HE	High efficiency
IOU	Investor Owned Utilities
LEP	Limited English proficient
LIHEAP	Low Income Home Energy Assistance Program
LINA	Low Income Needs Assessment Study
MBL	Medical Baseline
MIDI	Middle Income Direct Install
NGAT	Natural Gas Appliance Testing
PEV	Post Enrollment Verification
PG&E	Pacific Gas and Electric
PD	Proposed Decision
RFP	Request for Proposal
SoCalGas	Southern California Gas Company
SCE	Southern California Edison Company
SB	Senate Bill
SD&GE	San Diego Gas and Electric Company
SPOC	Single Point of Contact

5. APPENDIX:

5.1 Energy Savings Assistance Program Tables

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- Detail by Housing Type and Source

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

5.2 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

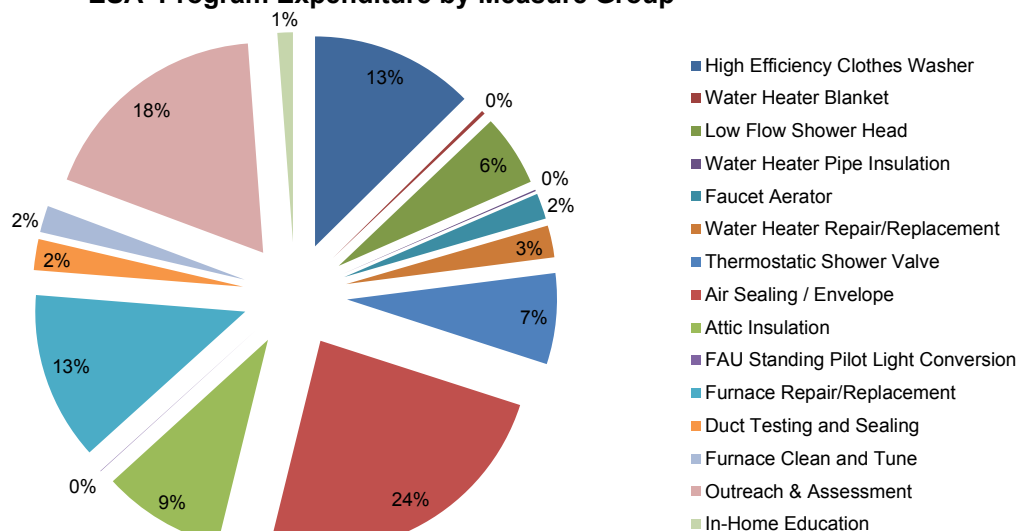
CARE- Table 11- CARE Capitation Applications

CARE- Table 12- CARE Expansion Program

CARE- Table 13- CARE Fund Shifting

	A	B	C	D
1	Energy Savings Assistance Program and CARE Program			
2	SOUTHERN CALIFORNIA GAS COMPANY			
3	PY 2015 Summary Highlights			
4				
5				
6	ESA Program			
7				
8	2015 Energy Savings Assistance Program Summary			
9	2015	Authorized / Planning Assumptions	Actual	%
10	Budget ¹	\$132,417,191	\$74,817,588	57%
11	Homes Treated	136,836	80,316	59%
12	kWh Saved	N/A	N/A	N/A
13	kW Demand Reduced	N/A	N/A	N/A
14	Therms Saved	2,417,480	1,565,091	65%
15				
16	¹ Pursuant to D.14-08-030, budgets have been updated to reflect the Phase II Decision authorized 2014 budget amounts for 2015			
17	bridge year.			
18				
19				
20	CARE Program			
21				
22	2015 CARE Summary			
23	2015	Authorized Budget	Actual	%
24	Budget (Administrative Expenses) ¹	\$16,368,113	\$7,014,825	43%
25	Subsidies	\$126,787,458	\$99,946,527	79%
26	Service Establishment Charge	\$4,354,719	\$2,334,875	54%
27	Total Program Costs and Discounts	\$147,510,290	\$109,296,227	74%
28	2015 CARE New Enrollments	Automatically Enrolled via Data Sharing, ESA Participation, etc	Self Certified as Categorically Eligible	Self Certified as Income Eligible
29	Method	73,256	138,742	67,137
30	2015 CARE Penetration	Estimated Eligible Participants	Participants	Penetration Rate
31	Total Enrolled ²	1,899,820	1,556,906	82%
32				
33	¹ Pursuant to D.14-08-030, budgets have been updated to reflect the Phase II Decision authorized 2014 budget amounts for 2015			
34	bridge year.			
35	² December 2015 results from the SoCalGas Monthly Report.			
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ESA Program Expenditure by Measure Group



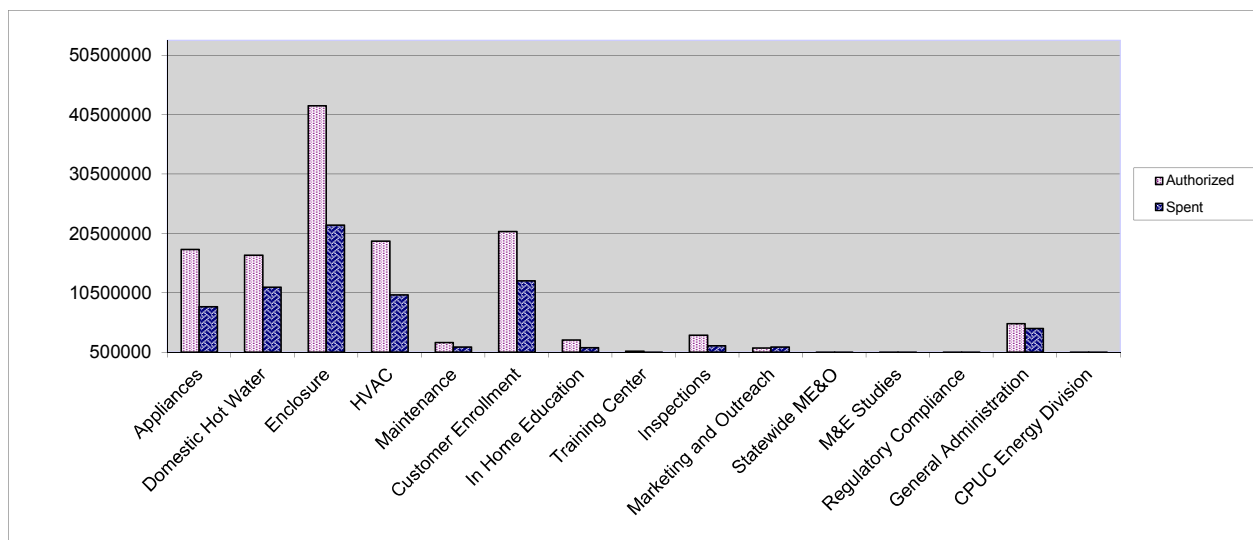
	A	B	C	D	E	F	G	H	I	J
1	PY 2015 Energy Savings Assistance Program Annual Report ESA Program Table 1 ESA Program Overall Program Expenses SOUTHERN CALIFORNIA GAS COMPANY									
2		2015 Authorized Bridge Year Budget ¹			2015 Annual Expenses			% of Budget Spent YTD		
3	ESA Program:	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
4	Energy Efficiency									
5	Appliances ²	\$ 17,785,151	\$ 17,785,151		\$ 8,164,512	\$ 8,164,512		46%	46%	
6	Domestic Hot Water	\$ 16,843,374	\$ 16,843,374		\$ 11,425,499	\$ 11,425,499		68%	68%	
7	Enclosure	\$ 41,983,756	\$ 41,983,756		\$ 21,906,200	\$ 21,906,200		52%	52%	
8	HVAC	\$ 19,210,885	\$ 19,210,885		\$ 10,138,763	\$ 10,138,763		53%	53%	
9	Maintenance	\$ 2,128,846	\$ 2,128,846		\$ 1,343,216	\$ 1,343,216		63%	63%	
10	Lighting	\$ -	\$ -		\$ -	\$ -				
11	Miscellaneous	\$ -	\$ -		\$ -	\$ -				
12	Customer Enrollment	\$ 20,834,354	\$ 20,834,354		\$ 12,498,363	\$ 12,498,363		60%	60%	
13	In Home Education	\$ 2,531,192	\$ 2,531,192		\$ 1,247,684	\$ 1,247,684		49%	49%	
14	Pilot		\$ -		\$ -	\$ -				
15	Energy Efficiency TOTAL	\$ 121,317,558	\$ 121,317,558		\$ 66,724,237	\$ 66,724,237		55%	55%	
16										
17	Training Center	\$ 681,105	\$ 681,105		\$ 297,204	\$ 297,204		44%	44%	
18	Inspections	\$ 3,361,051	\$ 3,361,051		\$ 1,604,154	\$ 1,604,154		48%	48%	
19	Marketing and Outreach	\$ 1,198,436	\$ 1,198,436		\$ 1,383,640	\$ 1,383,640		115%	115%	
20	Statewide Marketing Education and Outreach	\$ 100,000	\$ 100,000		\$ -	\$ -		0%	0%	
21	Measurement and Evaluation Studies	\$ 91,667	\$ 91,667		\$ -	\$ -		0%	0%	
22	Regulatory Compliance	\$ 295,333	\$ 295,333		\$ 281,575	\$ 281,575		95%	95%	
23	General Administration	\$ 5,286,041	\$ 5,286,041		\$ 4,508,000	\$ 4,508,000		85%	85%	
24	CPUC Energy Division	\$ 86,000	\$ 86,000		\$ 18,778	\$ 18,778		22%	22%	
25										
26	TOTAL PROGRAM COSTS	\$ 132,417,191	\$ 132,417,191		\$ 74,817,588	\$ 74,817,588		57%	57%	
27	Funded Outside of ESA Program Budget									
28	Indirect Costs				\$ 2,088,439	\$ 2,088,439				
29	NGAT Costs				\$ 1,648,820	\$ 1,648,820				

¹ Pursuant to D.14-08-030, budgets have been updated to reflect the Phase II Decision authorized 2014 budget amounts for 2015 bridge year and does not include funds shifted from previous years and/or prior program cycles, but includes \$1,046,575 in the Appliance category related to Phase II authorized Carry Back

Funding line item amount allocated as such.

² Funds shifted to PY 2015 in Appliances from PY 2012 unspent funds. (See ESA Program Table 12 - Fund Shifting).

Bar Chart 1 - Total Spent vs. Authorized by Category



PY2015 Energy Savings Assistance Program Annual Report
ESA Program Table 2
ESA Program Expenses and Energy Savings by Measures Installed
SOUTHERN CALIFORNIA GAS COMPANY

Measures	Units	PY Completed & Expensed Installations					% of Expenditure
		Quantity Installed	kWh (Annual)	kW (Annual)	Therms ¹ (Annual)	Expenses (\$) ²	
Appliances							
High Efficiency Clothes Washer	Each	10,711			330,756	8,301,732	12.61%
Refrigerators	Each						
Microwaves	Each						
Domestic Hot Water							
Water Heater Blanket	Home	3,501			8,432	196,041	0.30%
Low Flow Shower Head	Home	75,780			112,242	3,639,950	5.53%
Water Heater Pipe Insulation	Home	2,623			4,688	61,365	0.09%
Faucet Aerator	Home	72,440			246,721	1,295,373	1.97%
Water Heater Repair/Replacement	Each	1,146			3,992	1,623,055	2.47%
Thermostatic Shower Valve	Each	102,987			246,429	4,610,527	7.00%
Enclosure							
Air Sealing / Envelope	Home	59,312			249,505	15,723,076	23.88%
Attic Insulation	Home	5,091			136,840	6,185,992	9.40%
HVAC							
FAU Standing Pilot Light Conversion	Each	100			4,200	32,875	0.05%
Furnace Repair/Replacement	Each	7,128			0	8,542,864	12.98%
Room A/C Replacement	Each						
Central A/C Replacement	Each						
Heat Pump Replacement	Each						
Evaporative Coolers (Replacement)	Each						
Evaporative Coolers (Installation)	Each						
Duct Testing and Sealing	Home	2,289			35,065	1,564,144	2.38%
Maintenance							
Furnace Clean and Tune	Home	23,546			186,223	1,343,216	2.04%
Central A/C Tune-up	Home						
Evaporative Cooler Maintenance	Home						
Lighting							
Compact Fluorescent Lights (CFLs)	Each						
Interior Hard wired CFL fixtures	Each						
Exterior Hard wired CFL fixtures	Each						
Torchiere	Each						
Occupancy Sensor	Each						
LED Night Lights	Each						
Miscellaneous							
Pool Pumps	Each						
Smart Power Strips	Each						
Pilots							
	Each						
	Each						
Customer Enrollment							
Outreach & Assessment	Home	80,316				11,933,275	18.13%
In-Home Education	Home	52,185				781,163	1.19%
Total Savings					1,565,091	65,834,646	100.00%
Homes Weatherized	Home	79,986					
Homes Treated							
- Single Family Homes Treated	Home	55,044					
- Multi-family Homes Treated	Home	17,544					
- Mobile Homes Treated	Home	7,728					
- Total Number of Homes Treated	Home	80,316					
# Eligible Homes to be Treated in 2013	Home	136,836					
% OF Homes Treated	%	59.00%					
- Total Master-Metered Homes Treated	Home	10,533					

¹ All savings are calculated based on the following sources: ECONorthwest "Impact Evaluation of the 2011 CA Low Income Energy Efficiency Program, Final Report." June 16, 2011.

² The Total Savings/Expenditures amount does not include credits, expenses, or required adjustments for this period in various IO's. Additionally, the PY2015 expenses amount includes \$8,104 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 2015 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	2015	0.37	0.23	0.54	\$ (45,882,690)	\$ (57,353,540)	\$ (34,484,290)
6	2014	0.39	0.27	0.48	(67,295,329)	(56,725,431)	(49,018,687)
7	2013	0.36	0.24	0.51	(61,706,799)	(72,745,311)	(48,273,402)
8	2012	0.31	0.20	0.52	(55,914,989)	(64,445,167)	(39,917,606)
9	2011	0.27	0.18	0.73	(75,116,741)	(84,544,284)	(28,941,324)
10	2010	0.27	0.18	0.70	(56,410,628)	(63,936,482)	(24,097,023)
11	2009	0.31	0.21	0.67	(33,134,007)	(37,833,117)	(16,208,219)
12	2008	0.28	0.20	0.71	(26,904,944)	(30,069,392)	(10,909,048)
13	2007	0.28	0.20	0.68	(20,985,301)	(23,315,525)	(9,541,175)
14	2006	0.23	0.20	0.90	(21,852,544)	(21,456,113)	(2,798,151)
15	2005	0.20	0.24	0.54	(23,160,759)	(22,005,772)	(13,294,877)
16	2004	0.20	0.19	0.53	(26,138,097)	(26,305,744)	(15,353,305)
17	2003	0.29	0.30	0.63	(24,125,171)	(23,844,044)	(12,519,637)
18	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.						
19							
20							

	A	B	C	D	E	F	G
1	PY 2015 Energy Savings Assistance Program Annual Report ESA Program Table 4 Detail by Housing Type and Source SOUTHERN CALIFORNIA GAS COMPANY						
2			2015 Energy Savings				
3	Customer	Housing Type	# Homes Treated	(mWh)	MW	(Mth*)	2015 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		43,735			1,025,103	\$ 37,761,146
24		Single Family	36,427			903,074	\$33,703,676.00
25		Multi Family	658			6,454	\$348,763
26		Mobile Homes	6,650			115,575	\$3,708,707
27	Renters - Total		36,581			539,989	\$15,359,063
28		Single Family	18,617			413,861	\$11,166,637
29		Multi Family	16,886			107,154	\$3,780,783
30		Mobile Homes	1,078			18,973	\$411,642
31							
32	Totals:		80,316			1,565,091	\$ 53,120,209
33							
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 2015 expenses amount does not include \$8,104 paid in lead fees to the contractors for potential customers who were unwilling or unable to participate in the program.						
36							
37	Penetration History						
38	Year	Homes Treated ¹	Ineligible & Unwilling ²	Estimated Eligible in Current Year ³	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	92,967	10,029	136,836	67.94%		
52	2015	80,316	8,819	136,836	58.70%		
53	2016						
54	2017						
55	2018						
56	2019						
57	2020						
58	Total Homes Treated since 2002	1,083,529	101,457				
59							
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.						
63							
64							
65	Year	Utility in Shared Service Territory	Eligible Households in Shared Service Territory	Eligible households treated by both utilities in shared service territory			
66	2015	SDG&E	19,492	233			
67	2015	PG&E	96,408	2,193			
68	2015	SCE	1,210,880	26,526			
69							

	A	B	C	D	E	F	G
1	PY 2015 Energy Savings Assistance Program Annual Report ESA Program Table 5 ESA Program Direct Purchases & Installation Contractors SOUTHERN CALIFORNIA GAS COMPANY						
2	Contractor	County ¹	Contractor Type (Check one or more if applicable)				2015 Annual Expenditures ²
3			Private	CBO	WMDVBE	LIHEAP	
4	ADVANCED CONTRACTING SERVICES INC	Ke	x	-	-	-	\$ 201,946
5	AMERICAN ECO SERVICES INC	SD, Sba, SLO	x	-	x	-	\$ 865,903
6	AMERICAN INSULATION INC	R, I	x	-	x	-	\$ 2,005,424
7	APPLIANCE RECYCLING CENTERS OF AMERICA	LA	x	-	-	-	\$ 8,301,607
9	ASSERT INC	LA, Ke	-	x	-	-	\$ 509,343
10	ASSOCIATED CONSTRUCTION SERVICES	LA, OC, Sbe, R	x	-	x	-	\$ 1,000,414
11	AVALON CARVER COMMUNITY CENTER INC	LA	-	x	-	-	\$ 373,287
14	CAMPESINOS UNIDOS INC	R, I	-	x	x	x	\$ 357,709
15	COMMUNITY ACTION COMMISSION (SANTA BARBARA COUNTY)	Sba	-	x	-	x	\$ 84,302
16	COMMUNITY ACTION OF VENTURA COUNTY	V, LA	-	x	-	x	\$ 109,556
17	COMMUNITY ACTION PARTNERSHIP (OF SAN BERNADINO COUNTY)	Sbe	x	-	x	x	\$ 8,133
18	COMMUNITY ACTION PARTNERSHIP OF (SAN LUIS OBISPO)	SLO,	-	x	x	x	\$ 429,302
19	COMMUNITY ACTION PARTNERSHIP OF O C	OC	-	x	x	x	\$ 106,814
20	COMMUNITY ACTION PARTNERSHIP OF RIVERSIDE	R	-	x	-	x	\$ 2,535
22	EAGLE SYSTEMS INTERNATIONAL INC	LA, R, T, Ki	x	-	-	-	\$ 3,869,273
23	EAST LOS ANGELES COMMUNITY UNION	LA, R, OC, Sbe	-	x	x	-	\$ 9,106,786
25	ECO IMPRINTS INC	SF	x	-	-	-	\$ 187,003
26	ECONO WEST INC	LA, Ke	x	-	x	-	\$ 474,711
28	ENVIRONMENTAL ASSESSMENT SERVICES	I, LA, OC, R, Sbe	x	-	x	-	\$ 568,105
29	FCI MANAGEMENT CONSULTANTS	LA, OC, SD	x	-	x	-	\$ 181,463
30	GARCIA & SON'S HOME IMPROVEMENT INC	Ke, LA, T, Ki, F	x	-	x	-	\$ 346,169
33	HIGHLANDS ENERGY SERVICES INC	T, Ki, F	x	-	x	-	\$ 1,158,536
34	JOHN HARRISON CONTRACTING INC	R, Sbe	x	-	x	-	\$ 143,888
35	LONG BEACH COMMUNITY	LA	-	x	x	x	\$ 968
36	MARAVILLA FOUNDATION	LA, OC, Sbe, R, K	-	x	x	x	\$ 9,826,822
37	MASCO CONTRACTOR SERVICES OF	LA, R, Sbe, I, Ke, Ki, Tu	x	-	-	x	\$ 3,880,121
39	PACIFIC ASIAN CONSORTIUM IN	ALL, LA, OC, V, Sbe, R, SFERN	-	x	x	x	\$ 504,093
40	PACIFIC COAST ENERGY CONSERVATION	Ke	x	-	-	-	\$ 60,095
41	PROTEUS INC	T, LA, OC, V, Sbe, R, I, SC, SFERN, Ki, Ke, Sba, SLO, F	-	x	-	-	\$ 3,851,027
42	QUALITY CONSERVATION SERVICES INC	LA, OC, Sbe, R, SC, SF, CC, S	x	-	-	-	\$ 2,708,228
43	RELIABLE ENERGY MANAGEMENT INC	LA, OC, V, Sbe, R, SFERN, T, Ki, Ke, Sba, SLO, F	x	-	x	-	\$ 4,608,128
44	RICHARD HEATH & ASSOCIATES INC	ALL, LA, OC, V, Sbe, R, I, Ke, Sba, SLO	x	-	x	-	\$ 935,432
45	SIERRA WEATHERIZATION COMPANY INC	LA, V, OC, SC, AL, Scr	x	-	-	-	\$ 4,819,006
46	SILICON VALLEY FOUNDATION	SC, OC, LA	x	-	x	-	\$ 2,220,642
47	SOCO AIR CONDITIONING CO	LA, OC, R, Sbe	x	-	-	-	\$ 270,780
48	SPECIALTY AC HEAT	SBN, LA, RIVR, SFERN	x	-	-	-	\$ 63,673
49	SPECIALTY AC HEAT INC	SBN, LA, RIVR, SFERN, OC	x	-	x	-	\$ 496,053
50	STAPLES & ASSOC	T, Ki, F, Ke	x	-	-	-	\$ 208,117
53	TONY'S HEATING & A/C SERVICE INC.	LA, OC, SFERN	x	-	x	x	\$ 587,169
54	TRI-STATE HOME IMPROVEMENTS INC	R	x	-	x	-	\$ 112,712
55	TRUTEAM OF CALIFORNIA INC	LA, R, Sbe, I, Ke, Ki, Tu, OC, V, T, F, SFERN	x	-	-	x	\$ 449,422
56	VETERANS IN COMMUNITY SERVICES INC	LA	-	x	x	-	\$ 1,228,605
57	WATTS LABOR COMMUNITY ACTION COMM	LA	-	x	x	-	\$ 318,328
58	WESTERN INSULATION LP	LA, R, Sbe, I, Ke, Ki, Tu	x	-	-	x	\$ 85,497
59	Total Contractor Expenditures						\$ 67,627,127
60							
61							
62	1 Key						
63	Alameda	AL					
64	Los Angeles	LA					
65	Orange County	OC					
66	Ventura	V					
67	San Bernadino	Sbe					
68	Riverside	R					
69	Imperial	I					
70	Tulare	T					
71	Kings	Ki					
72	Kern	Ke					
73	Santa Barbara	Sba					
74	San Luis Obispo	SLO					
75	Fresno	F					
76	San Diego	SD					
77	San Fernando	SFERN					
78	Santa Clara	SC					
79	San Francisco	SF					
80	Santa Cruz	Scr					
81	Contra Costa	CC					
82	Solano	S					
83							
84	2 The expenditures do not include a credit of (\$151,670) for the high efficiency clothes washer rebates from (Eastern Municipal Water District, Park						
85	Water Co, San Gabriel Water Co, and other journal entry corrections for misc. revenue). \$67,627,127 - \$151,670 = \$67,475,457. (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 2015 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						2015 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	62,319	78%	62,319	78%	\$41,182,500.21	63%	17,997	22%	17,997	22%	\$24,652,146.12	37%	80,316	80,316	\$65,834,646.33	\$823.62	\$823.62
6	Appliances																		
7	High Efficiency Clothes Washer	Each	0	0%	0	0%	\$60.00	0%	10,711	100%	10,711	100%	\$8,301,672.32	100%	10,711	10,711	\$8,301,732.32	\$775.07	\$775.07
8	Refrigerators	Each																	
9	Microwaves	Each																	
10	Domestic Hot Water																		
11	Water Heater Blanket	Home	1,834	52%	1,833	52%	\$102,255.56	52%	1,669	48%	1,668	48%	\$93,784.95	48%	3,503	3,501	\$196,040.51	\$55.96	\$56.00
12	Low Flow Shower Head	Home	78,611	68%	52,285	69%	\$2,477,303.05	68%	37,409	32%	23,495	31%	\$1,162,646.51	32%	116,020	75,780	\$3,639,949.56	\$31.37	\$48.03
13	Water Heater Pipe Insulation	Home	1,526	54%	1,424	54%	\$32,759.79	53%	1,294	46%	1,199	46%	\$28,605.17	47%	2,820	2,623	\$61,364.96	\$21.76	\$23.39
14	Faucet Aerator	Home	105,216	69%	50,460	70%	\$900,611.37	70%	46,288	31%	21,980	30%	\$394,761.91	30%	151,504	72,440	\$1,295,373.28	\$8.55	\$17.88
15	Water Heater Repair/Replacement	Each	891	78%	891	78%	\$1,207,370.99	74%	255	22%	255	22%	\$415,683.76	26%	1,146	1,146	\$1,623,054.75	\$1,416.28	\$1,416.28
16	Thermostatic Shower Valve	Each	70,285	68%	47,715	70%	\$3,151,106.74	68%	32,702	32%	20,756	30%	\$1,459,420.17	32%	102,987	68,471	\$4,610,526.91	\$44.77	\$67.34
17	Enclosure																		
18	Air Sealing / Envelope	Home	428,796	71%	40,329	68%	\$11,037,035.93	70%	176,814	29%	18,983	32%	\$4,686,040.09	30%	605,610	59,312	\$15,723,076.02	\$25.96	\$265.09
19	Attic Insulation	Home	3,122,119	58%	3,044	60%	\$3,612,661.02	58%	2,236,941	42%	2,047	40%	\$2,573,331.24	42%	5,359,060	5,091	\$6,185,992.26	\$1.15	\$1,215.08
20	HVAC																		
21	FAU Standing Pilot Light Conversion	Each	89	89%	86	89%	\$29,361.01	89%	11	11%	11	11%	\$3,513.67	11%	100	97	\$32,874.68	\$328.75	\$338.91
22	Furnace Repair/Replacement	Each	6,068	85%	5,831	85%	\$7,146,592.08	84%	1,060	15%	1,044	15%	\$1,396,272.14	16%	7,128	6,875	\$8,542,864.22	\$1,198.49	\$1,242.60
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	1,281	54%	1,225	54%	\$968,722.95	62%	1,095	46%	1,064	46%	\$595,421.25	38%	2,376	2,289	\$1,564,144.20	\$658.31	\$683.33
29	Maintenance																		
30	Furnace Clean and Tune	Home	16,967	68%	16,103	68%	\$914,772.90	68%	8,010	32%	7,443	32%	\$428,442.62	32%	24,977	23,546	\$1,343,215.52	\$53.78	\$57.05
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	62,319	78%	62,319	1%	\$8,982,386.82	75%	17,997	22%	17,997	22%	\$2,950,887.82	25%	80,316	80,316	\$11,933,274.64	\$148.58	\$148.58
48	In-Home Education	Home	41,356	78%	41,356	78%	\$619,500.00	78%	10,829	22%	10,829	22%	\$161,662.50	22%	52,185	52,185	\$781,162.50	\$12.37	\$12.37
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 2015 Energy Savings Assistance Program Annual Report ESA Program Table 7 Expenditures Recorded by Cost Element SOUTHERN CALIFORNIA GAS COMPANY				
2					
3	ESA Program:	Labor¹	Non-Labor²	Contractor³	Total
4	Energy Efficiency				
5	Appliances	\$ -	\$ -	\$ 8,164,512	\$ 8,164,512
6	Domestic Hot Water	\$ -	\$ -	\$ 11,425,499	\$ 11,425,499
7	Enclosure	\$ -	\$ -	\$ 21,906,200	\$ 21,906,200
8	HVAC	\$ -	\$ 3,223	\$ 10,135,540	\$ 10,138,763
9	Maintenance	\$ -	\$ -	\$ 1,343,216	\$ 1,343,216
10	Lighting	\$ -	\$ -	\$ -	\$ -
11	Miscellaneous	\$ -	\$ -	\$ -	\$ -
12	Customer Enrollment	\$ 500,490	\$ 69,351	\$ 11,928,522	\$ 12,498,363
13	In Home Education	\$ -	\$ 279,870	\$ 967,814	\$ 1,247,684
14	Pilot	\$ -	\$ -	\$ -	
15	Energy Efficiency TOTAL	\$ 500,490	\$ 352,444	\$ 65,871,303	\$ 66,724,237
16					
17	Training Center	\$ 288,023	\$ 9,181	\$ -	\$ 297,204
18	Inspections	\$ -	\$ -	\$ 1,604,154	\$ 1,604,154
19	Marketing and Outreach	\$ 2,595	\$ 1,381,046	\$ -	\$ 1,383,640
20	Statewide Marketing Education and Outreach	\$ -	\$ -	\$ -	\$ -
21	Measurement and Evaluation Studies	\$ 0	\$ -	\$ -	\$ 0
22	Regulatory Compliance	\$ 272,002	\$ 9,573	\$ -	\$ 281,575
23	General Administration	\$ 3,967,823	\$ 540,177	\$ -	\$ 4,508,000
24	CPUC Energy Division	\$ -	\$ 18,778	\$ -	\$ 18,778
25					
26	TOTAL PROGRAM COSTS	\$ 5,030,933	\$ 2,311,198	\$ 67,475,457	\$ 74,817,588
27					
28					
29	¹ Labor: Utility staff labor including indirects (vacation and sick leave, payroll taxes, and affiliate labor indirects).				
30	² Non-Labor: All Other non-labor cost excluding contractor cost defined below.				
31	³ Contractor: Expenses associated with contractor installations, Weatherization, Inspections, Outreach and Assessment, and In				
32	Home Energy Education services.				
33					

	A	B	C	D	E	F	G	H	I
1	PY 2015 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	3	0	0	0	1	7	0	1
5	Imperial	462	0	0	11	0	136	7	37
6	Kern	25	1	0	1	18	7	1	3
7	Kings	25	0	0	0	0	3	0	1
8	Los Angeles	2,465	2	0	132	27	813	311	138
9	Orange	241	14	0	19	22	121	46	6
10	Riverside	1,458	0	0	35	23	686	197	149
11	San Bernardino	533	1	0	16	14	306	131	32
12	San Luis Obispo	1	0	0	0	0	0	0	1
13	Santa Barbara	0	0	0	0	0	0	0	0
14	Tulare	76	0	0	2	4	9	2	3
15	Ventura	20	0	0	0	5	6	1	1
16	Total	5,309	18	0	216	114	2,094	696	372

	A	B	C	D	E	F	G
1	PY 2015 Energy Savings Assistance Program Annual Report ESA Program Table 9 Life Cycle Bill Savings by Measure SOUTHERN CALIFORNIA GAS COMPANY						
2	Measure Description		2015 Number Installed	Per Measure Electric Impact - Average (kWh)	Per Measure Gas Impact (Therms)	Effective Useful Life (EUL)	2015 Total Measure Life Cycle Bill Savings
3	Appliances						
4	High Efficiency Clothes Washer	Each	10,711		30.88	11	\$1,707,975
5	Refrigerators	Each					
6	Microwaves	Each					
7	Domestic Hot Water						
8	Water Heater Blanket	Home	3,501		1.28	3.7	\$13,918
9	Low Flow Shower Head	Home	75,780		0.98	10	\$842,334
10	Water Heater Pipe Insulation	Home	2,623		0.85	11	\$26,009
11	Faucet Aerator	Home	72,440		0.20	10	\$2,497,672
12	Water Heater Repair/Replacement	Each	1,146		3.52	11	\$20,612
13	Thermostatic Shower Valve	Each	102,987		1.74*	10	\$1,179,395
14	Enclosure						
15	Air Sealing / Envelope	Home	59,312			11	\$1,288,406
16	Attic Insulation	Home	5,091			20	\$1,086,749
17	HVAC						
18	FAU Standing Pilot Light Conversion	Each	100		42.00	6.7	\$13,048
19	Furnace Repair/Replacement	Each	7,128		0.00	20	\$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	2,289		6.96*	18	\$259,867
26	Maintenance						
27	Furnace Clean and Tune	Home	23,546		5.15*	5	\$522,599
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		80,316				80,316
44	Life Cycle Bill Savings Per Home						\$ 118
45	* These savings are an average of individual savings for MF, MH and SF.						

	A	B	C
1	PY 2015 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	2014		N/A
4	2015		0.57
5	2016		0.59
6	2017		0.61
7	2018		0.63
8	2019		0.65
9	2020		0.66
10	2021		0.68
11	2022		0.70
12	2023		0.73
13	2024		0.75
14	2025		0.77
15	2026		0.79
16	2027		0.82
17	2028		0.84
18	2029		0.87
19	2030		0.89
20	2031		0.92
21	2032		0.95
22	2033		0.98
23	2034		1.00
24	2035		1.04
25	2036		1.07
26	2037		1.10
27	2038		1.13

	A	B	C	D	E
1	PY 2015 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
6	2014	\$ 93,781,355	\$ 13,802,052	0.15	\$ 147
7	2015	\$ 74,817,588	\$ 9,458,585	0.13	\$ 118
8					
9					

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

¹ SoCalGas' 2012 total unspent balance available for carry-forward was \$34,103,518 (2012 Phase II D, 014-08-030 authorized budget of \$127,199,269 less net 2012 carry-back to 2011 of \$3,049,478 less 2012 expenditures of \$82,252,135 less fundshift of \$7,608,934 carried forward from 2012 to 2013, less fund shift of \$185,204 carried forward from 2012 to 2015).

² In October 2015, SoCalGas increased PY 2015 Marketing and Outreach category budget by \$161,000 to fund outreach efforts. The shift was funded from the unspent 2012 Outreach balance of \$429,173 reflected in the revised authorized budget (Phase II - D14-08-030).

³ In December 2015, SoCalGas increased PY 2015 Marketing and Outreach category budget by \$24,204 to fund outreach efforts. The shift was funded from the unspent 2012 Outreach balance of \$268,173 reflected in the revised authorized budget (Phase II - D14-08-030) which takes into account the October 2015 fund shift of \$161,000 stated in footnote ².

	A	B
1	PY 2015 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)	6,843
8	Supplemental Security Income (SSI)	3,769
9	CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	2,169
10	CalWORKs/Temporary Assistance for Needy Families (TANF)	295
11	Tribal TANF	9
12	Medicaid/Medi-Cal for Families	15,507
13	Healthy Families A&B	248
14	National School Lunch Program (NSLP) - Free Lunch	1,341
15	Low-income Home Energy Assistance Program (LIHEAP)	268
16	Bureau of Indian Affairs General Assistance	2
17	Head Start Income Eligible - (Tribal Only)	1
18	Other (specify)	49,864
19	Total Number of Customers Enrolled	80,316
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 2015 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	\$ 961	71,265 kWh through various electric measures installed	440 CFL's, 58 Energy Star refrigerators, and 36 Smart Power Down Strips, 12 Torchieres	89	See note "A".	Yes	N/A
4	Leveraging	Anaheim Public Utilities (APU)	SoCalGas has a signed leveraging contract with APU	Yes	Yes	\$ 4,838	335,698 kWh through various electric measures installed	3,387 CFL's, 698 A/C Tune-ups, 69 Duct Sealing, 192 Room A/C's, and 491 Smart Power Down Strips, 12 Torchieres	448	See note "A".	Yes	N/A
5	Leveraging	Los Angeles Department of Water & Power (LADWP)	SoCalGas has a signed leveraging contract with LADWP	Yes	Yes	\$ 7,150	kWh through various electric measures installed	1,524 CFL's, 660 LED Night Lights	662	See note "A".	Yes	N/A
6	Leveraging	Pasadena Water and Power (PWP)	SoCalGas has a signed leveraging contract with PWP	Yes	Yes	\$ 140	4,382 kWh through various electric measures installed	102 CFL's, 7 A/C Tune-ups	13	See note "A".	Yes	N/A
7	Leveraging	EMWD	EMWD co-funded the ESA Program High Efficiency Clothes Washer Measure (HECW) for unit installed in overlapping territory.	Yes	Yes	\$ 35,117	1297.29	.91 million gallons of water saved	91	See note "A".	Yes	N/A
8	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	\$ 18,000	664.95	.90 million gallons of water saved	90	See note "A".	Yes	N/A
9	Leveraging	Fontana Water Company	Fontana Water Company co-funded the ESA Program High Efficiency Clothes Washer Measure (HECW) for unit installed in overlapping territory.	Yes	Yes	\$ 19,500	720.37	1.30 million gallons of water saved	130	See note "A".	Yes	N/A
10	Leveraging	Irvine Ranch Water District	Irvine Ranch Water District co-funded the ESA Program High Efficiency Clothes Washer Measure (HECW) for unit installed in overlapping territory.	Yes	Yes	\$ 1,485	54.86	90,000 gallons of water saved	9	See note "A".	Yes	N/A
11	Leveraging	Metropolitan Water District	Metropolitan Water District co-funded the ESA Program High Efficiency Clothes Washer Measure (HECW) for unit installed in overlapping territory.	Yes	Yes	\$ 287,555	10622.80	33.83 million gallons of water saved	3383	See note "A".	Yes	N/A

[illegible]

	A	B	C	D	E	F
1	PY 2013 Energy Savings Assistance Program Annual Report					
2	ESA ProgramTable 15					
3	Lighting					
4	SOUTHERN CALIFORNIA GAS COMPANY					
5	ESA Program CFL Tracking Table					
6	Instructions: Please identify the CFL bulbs used within your ESA program and fill in the remaining columns for each					
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						
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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 standatdts 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.					

	A	B	C	D	E	F	G	H
1	PY 2015 Energy Savings Assistance Program Annual Report ESA Program Table 16 "Add Back" Measures SOUTHERN CALIFORNIA GAS COMPANY							
2								
3								
4								
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	0.62	2.80	0.41	48	\$5,441	2,513
8	Air sealing / envelope, MF	5	0.66	2.95	0.44	220	\$23,193	11,997
9	Air sealing / envelope, MF	6	0.02	0.10	0.01	601	\$102,155	838
10	Air sealing / envelope, MF	7	N/A	N/A	N/A	N/A	N/A	N/A
11	Air sealing / envelope, MF	8	0.04	0.20	0.03	2124	\$466,011	7,678
12	Air sealing / envelope, MF	9	0.06	0.25	0.04	3315	\$608,628	13,010
13	Air sealing / envelope, MF	10	0.41	1.85	0.27	1265	\$182,118	40,892
14	Air sealing / envelope, MF	13	0.61	2.74	0.40	327	\$47,285	21,040
15	Air sealing / envelope, MF	14	0.63	2.83	0.42	401	\$68,198	32,365
16	Air sealing / envelope, MF	15	0.03	0.13	0.02	463	\$68,415	717
17	Air sealing / envelope, MF	16	0.37	1.71	0.24	177	\$24,430	4,570
18	Air sealing / envelope, MH	4	0.55	2.45	0.36	28	\$4,244	1,520
19	Air sealing / envelope, MH	5	0.57	2.55	0.38	134	\$17,782	6,871
20	Air sealing / envelope, MH	6	0.61	2.71	0.40	466	\$65,845	28,636
21	Air sealing / envelope, MH	7	N/A	N/A	N/A	N/A	N/A	N/A
22	Air sealing / envelope, MH	8	0.07	0.29	0.04	674	\$89,108	2,227
23	Air sealing / envelope, MH	9	0.15	0.69	0.10	570	\$87,348	5,504
24	Air sealing / envelope, MH	10	0.59	2.66	0.39	2156	\$327,214	137,162
25	Air sealing / envelope, MH	13	0.48	2.13	0.31	234	\$47,813	13,413
26	Air sealing / envelope, MH	14	0.48	2.16	0.32	474	\$118,758	34,218
27	Air sealing / envelope, MH	15	0.00	0.00	0.00	522	\$94,969	-
28	Air sealing / envelope, MH	16	0.51	2.26	0.33	87	\$20,130	6,258
29	Air sealing / envelope, SF	4	0.41	1.83	0.27	180	\$43,557	9,667
30	Air sealing / envelope, SF	5	0.39	1.72	0.25	1208	\$315,849	63,939
31	Air sealing / envelope, SF	6	0.03	0.12	0.02	2558	\$763,892	7,265
32	Air sealing / envelope, SF	7	N/A	N/A	N/A	N/A	N/A	N/A
33	Air sealing / envelope, SF	8	0.03	0.14	0.02	10786	\$3,323,510	37,874
34	Air sealing / envelope, SF	9	0.04	0.19	0.03	8974	\$2,765,837	44,487
35	Air sealing / envelope, SF	10	0.24	1.09	0.16	10166	\$2,536,366	276,653
36	Air sealing / envelope, SF	13	0.30	1.34	0.20	3858	\$1,579,537	226,316
37	Air sealing / envelope, SF	14	0.46	2.06	0.30	2860	\$799,830	212,668
38	Air sealing / envelope, SF	15	0.00	0.00	0.00	3054	\$708,271	-
39	Air sealing / envelope, SF	16	0.21	0.94	0.14	1382	\$417,341	38,109
40	Attic insulation, MF	4	N/A	N/A	N/A	N/A	N/A	N/A
41	Attic insulation, MF	5	N/A	N/A	N/A	N/A	N/A	N/A

	A	B	C	D	E	F	G	H
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
42	Attic insulation, MF	6	0.54	0.44	0.36	10	\$6,496	2,217
43	Attic insulation, MF	7	N/A	N/A	N/A	N/A	N/A	N/A
44	Attic insulation, MF	8	0.51	0.42	0.34	59	\$41,593	13,082
45	Attic insulation, MF	9	0.48	0.40	0.32	55	\$43,271	12,252
46	Attic insulation, MF	10	0.29	0.24	0.19	2	\$2,874	382
47	Attic insulation, MF	13	0.32	0.26	0.21	2	\$2,300	350
48	Attic insulation, MF	14	N/A	N/A	N/A	N/A	N/A	N/A
49	Attic insulation, MF	15	0.14	0.11	0.09	6	\$3,869	208
50	Attic insulation, MF	16	0.11	0.09	0.07	4	\$3,457	139
51	Attic insulation, SF	4	0.17	0.14	0.11	3	\$3,640	251
52	Attic insulation, SF	5	0.29	0.24	0.19	108	\$149,159	19,985
53	Attic insulation, SF	6	0.38	0.31	0.25	428	\$492,336	96,125
54	Attic insulation, SF	7	N/A	N/A	N/A	N/A	N/A	N/A
55	Attic insulation, SF	8	0.41	0.33	0.27	1383	\$1,437,071	307,645
56	Attic insulation, SF	9	0.37	0.31	0.25	1262	\$1,466,690	277,622
57	Attic insulation, SF	10	0.31	0.25	0.20	729	\$1,034,013	150,469
58	Attic insulation, SF	13	0.26	0.21	0.17	564	\$878,642	101,855
59	Attic insulation, SF	14	0.29	0.24	0.19	99	\$127,618	17,132
60	Attic insulation, SF	15	0.37	0.30	0.25	172	\$241,357	44,982
61	Attic insulation, SF	16	0.34	0.28	0.23	205	\$251,605	42,053
62	Duct sealing and testing, MF	all	0.00	0.00	0.00	6	\$14,654	-
63	Duct sealing and testing, MH	all	0.03	0.02	0.02	14	\$53,599	568
64	Duct sealing and testing, SF	all	0.37	0.29	0.23	2269	\$1,495,884	259,299
65	Heating system, MF	5	0.00	0.00	0.00	1	\$847	-
66	Heating system, MF	6	0.00	0.00	0.00	7	\$10,667	-
67	Heating system, MF	7	N/A	N/A	N/A	N/A	N/A	N/A
68	Heating system, MF	8	0.00	0.00	0.00	37	\$41,159	-
69	Heating system, MF	9	0.00	0.00	0.00	21	\$23,403	-
70	Heating system, MF	10	0.00	0.00	0.00	5	\$7,904	-
71	Heating system, MF	13	0.00	0.00	0.00	0	0	-
72	Heating system, MF	14	0.00	0.00	0.00	1	\$374	-
73	Heating system, MF	15	0.00	0.00	0.00	2	\$2,952	-
74	Heating system, MF	16	0.00	0.00	0.00	8	\$6,073	-
75	Heating system, MH	4	0.00	0.00	0.00	3	\$527	-
76	Heating system, MH	5	0.00	0.00	0.00	8	\$1,378	-
77	Heating system, MH	6	0.00	0.00	0.00	69	\$100,825	-
78	Heating system, MH	7	N/A	N/A	N/A	N/A	N/A	N/A

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	A	B	C	D	E	F	G	H
1	PY 2015 CARE Annual Report							
2	CARE Table 1							
3	Overall Program Expenses							
4	SOUTHERN CALIFORNIA GAS COMPANY							
5	Category	Overall		Total	Authorized Budget ¹	% of Budget Spent	Total Shifted	Shifted to / from?
6		Electric	Gas					
7	Outreach ⁴	\$ -	\$ 3,882,068	\$ 3,882,068	\$ 3,750,223	104%	\$ 131,845	Fundshifted \$131,845 from 2015 I.T. Programming category authorized budget.
8	Processing, Certification, Recertification	\$ -	\$ 1,138,810	\$ 1,138,810	\$ 4,488,248	25%		
9	Post Enrollment Verification	\$ -	\$ 129,028	\$ 129,028	\$ 3,744,000	3%		
10	IT Programming	\$ -	\$ 530,359	\$ 530,359	\$ 2,937,450	18%	\$ (296,845)	Fundshifted \$165,000 to 2015 Reg Compliance category authorized budget, however, only \$154,042 of the fundshift was needed. In addition, fundshifted \$131,845 to Outreach category.
11	Cooling Centers	\$ -	\$ -	\$ -	\$ -	N/A		
12	Pilots ³	\$ -	\$ 167,700	\$ 167,700	\$ 183,600	91%		
13	Measurement & Evaluation	\$ -	\$ -	\$ -	\$ 18,659	0%		
14	Regulatory Compliance ²	\$ -	\$ 396,549	\$ 396,549	\$ 242,507	164%	\$ 165,000	Fundshifted from 2015 I.T. Programming category authorized budget, however, only \$154,042 of the fundshift was needed.
15	General Administration	\$ -	\$ 726,496	\$ 726,496	\$ 943,426	77%		
16	CPUC Energy Division	\$ -	\$ 43,815	\$ 43,815	\$ 60,000	73%		
17								
18	TOTAL Program Costs	\$ -	\$ 7,014,825	\$ 7,014,826	\$ 16,368,113	43%		
19								
20	CARE Rate Discount	\$ -	\$ 102,281,402	\$ 102,281,402	\$ 131,142,177	78%		
21								
22	TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	\$ -	\$ 109,296,227	\$ 109,296,227	\$ 147,510,290	74%		

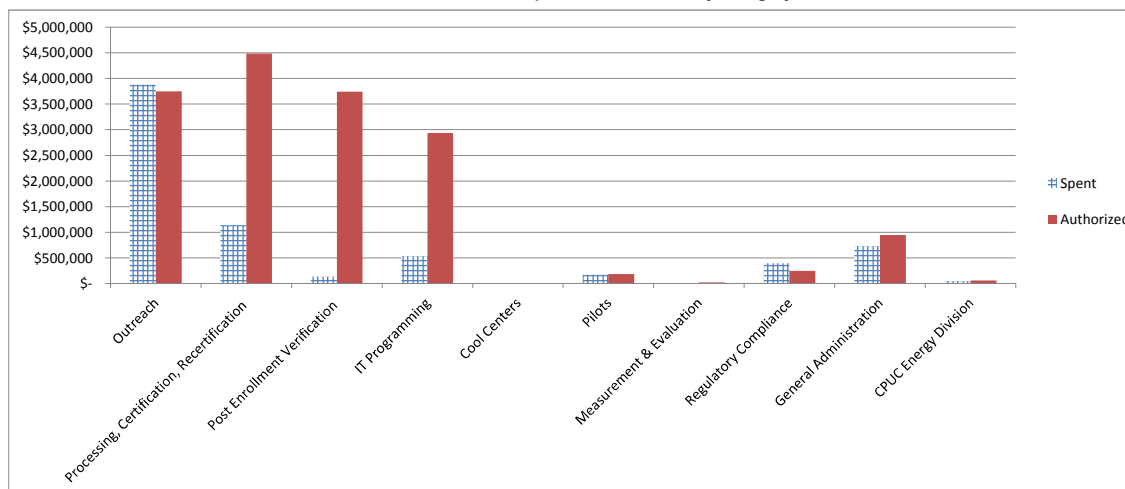
¹ Pursuant to D.14-08-030, budgets have been updated to reflect the Phase II Decision authorized 2014 budget amounts for bridge year 2015.

² In August 2015, the Regulatory Compliance category budget has been increased by \$165,000 to \$407,507 from \$242,507. This increase is to fund necessary labor expense consistent with 2014 levels. Of the amount shifted only \$154,042 was needed. The shift is funded from the I.T. Programming category, decreased from \$2,937,450 to \$2,772,450.

³ CHANGES Pilot budget contains a 2% increase over the Phase II D.14-08-030 authorized 2014 budget amount of \$180,000 (per D.14-08-030, p. 81). SoCalGas notes that the total 2015 authorized budget number shown in D.14-08-030, Ordering Paragraph 2 does not contain the full escalation amount for Changes Pilot category.

⁴ In December 2015, the Outreach category budget has been increased by \$131,845 to \$3,882,068 from \$3,750,223 to fund Outreach efforts. The shift is funded from the I.T. Programming category, decreased from \$2,772,450 to \$2,640,605 which includes the August 2015 fund shift in footnote 2.

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 2015 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	1,779	2,197	129	4,105	2,342	14,554	1,757	18,653	9	22,767	10,071	8,626	23,444	42,141	12,715	2,138	369	10,916	26,138	64,908	-3,371	1,564,640	1,894,881	82.57%
9	February	976	2,243	174	3,393	4,536	14,547	1,659	20,742	0	24,135	12,561	9,690	13,008	35,259	12,373	2,596	410	17,427	32,806	59,394	-8,671	1,555,969	1,894,881	82.11%
10	March	1,858	2,385	249	4,492	3,921	18,714	2,308	24,943	0	29,435	19,934	15,568	19,409	54,911	10,061	4,116	538	13,728	28,443	84,346	992	1,556,961	1,894,881	82.17%
11	April	4,367	1,969	236	6,572	2,580	17,730	2,367	22,677	0	29,249	14,152	14,849	15,768	44,769	8,097	1,906	580	13,146	23,729	74,018	5,520	1,562,481	1,899,163	82.27%
12	May	3,932	1,960	209	6,101	2,551	14,147	1,473	18,171	0	24,272	11,885	12,767	18,198	42,850	9,802	1,472	567	6,647	18,488	67,122	5,784	1,568,265	1,899,163	82.58%
13	June	3,596	1,476	206	5,278	2,100	16,452	2,651	21,203	6	26,487	14,674	15,702	20,793	51,169	9,697	1,719	448	18,389	30,253	77,656	-3,766	1,564,499	1,899,163	82.38%
14	July	4,901	1,837	200	6,938	2,131	13,137	1,138	16,406	0	23,344	13,956	14,062	25,135	53,153	10,369	2,029	431	11,718	24,547	76,497	-1,203	1,563,296	1,898,272	82.35%
15	August	6,131	1,767	173	8,071	2,107	11,400	482	13,989	5	22,065	12,221	15,434	16,813	44,468	7,726	1,933	424	17,106	27,189	66,533	-5,124	1,558,172	1,898,272	82.08%
16	September	4,861	1,942	211	7,014	1,967	10,799	327	13,093	0	20,107	11,560	11,958	15,160	38,678	6,633	1,550	403	13,568	22,154	58,785	-2,047	1,556,125	1,898,272	81.98%
17	October	6,741	1,705	97	8,543	1,827	8,853	1,166	11,846	2	20,391	12,009	14,552	16,844	43,405	1,398	175	374	11,860	13,807	63,796	6,584	1,562,709	1,899,820	82.26%
18	November	4,809	1,931	151	6,891	1,812	8,766	2,716	13,294	0	20,185	6,285	8,814	269	15,368	15,105	70	323	9,078	24,576	35,553	-4,391	1,558,318	1,899,820	82.02%
19	December	3,824	1,924	110	5,858	1,280	7,864	1,718	10,862	0	16,720	4,717	7,548	49,075	61,340	7,659	1,471	178	8,824	18,132	78,060	-1,412	1,556,906	1,899,820	81.95%
20	YTD Total	47,775	23,336	2,145	73,256	29,154	156,963	19,762	205,879	22	279,157	144,025	149,570	233,916	527,511	111,635	21,175	5,045	152,407	290,262	806,668	-11,105	1,556,906	1,899,820	81.95%
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.bii in the following month will count in the following month.																								

	A	B	C	D	E	F	G	H	I
1	PY 2015 CARE Annual Report								
2	CARE Table 3A								
3	Post-Enrollment Verification Results (Model) 2015								
4	SOUTHERN CALIFORNIA GAS COMPANY								
5	2015	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	1,564,640	3,252	0.21%	1,815	158	1,973	60.67%	0.13%
7	February	1,555,969	3,413	0.22%	1,758	135	1,893	55.46%	0.12%
8	March	1,556,961	4,246	0.27%	2,203	147	2,350	55.35%	0.15%
9	April	1,562,481	4,598	0.29%	2,457	201	2,658	57.81%	0.17%
10	May	1,568,265	3,743	0.24%	2,157	175	2,332	62.30%	0.15%
11	June	1,564,499	3,422	0.22%	1,851	134	1,985	58.01%	0.13%
12	July	1,563,296	3,589	0.23%	1,936	187	2,123	59.15%	0.14%
13	August	1,558,172	2,567	0.16%	1,310	100	1,410	54.93%	0.09%
14	September	1,556,125	2,680	0.17%	1,376	123	1,499	55.93%	0.10%
15	October	1,562,709	2,364	0.15%	1,377	96	1,473	62.31%	0.09%
16	November	1,558,318	2,494	0.16%	1,559	98	1,657	66.44%	0.11%
17	December	1,556,906	1,955	0.13%	979	66	1,045	53.45%	0.07%
18	YTD Total	1,556,906	38,323	2.46%	20,778	1,620	22,398	58.45%	1.44%
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	CARE Table 3B - Post-Enrollment Verification Results (High Usage)								
25	2015								
26	Not Applicable to SoCalGas								
27	2015	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
28	January								
29	February								
30	March								
31	April								
32	May								
33	June								
34	July								
35	August								
36	September								
37	October								
38	November								
39	December								
40	YTD Total	0	0	0.00%	0	0	0	0.00%	0.00%
41									
42	¹ Includes customers verified as over income or who requested to be de-enrolled.								
43	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 2015 CARE Annual Report CARE Table 4 CARE Self-Certification and Self-Recertification Applications SOUTHERN CALIFORNIA GAS COMPANY						
2							
3							
4							
5		Provided ¹	Received	Approved ²	Denied ³	Pending/ Never Completed ⁴	Duplicates ⁵
6	Total	5,403,206	453,860	330,990	29,624	26,048	67,198
7	Percentage		100.00%	72.93%	6.53%	5.74%	14.81%
8							
9	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.						
10	² Approved includes customers who are approved through mail-in, via web, by phone, and through duplicated applications.						
11	³ Customers are denied due to not being CARE eligible, not customer of record, or not the customer's primary residence.						
12	⁴ Pending/Never Completed includes closed accounts, incomplete applications, and customers of other utilities who are not SoCalGas customers.						
13	⁵ Duplicates are customers who are already enrolled in CARE and mail in another CARE application. SoCalGas treats them as recertification applications.						

	A	B	C	D	E	F	G	H	I	J
1	PY 2015 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	Rural ¹	Total	Urban	Rural	Total	Urban	Rural	Total
7	Fresno	11,271	18	11,288	11,123	21	11,144	98.69%	117.39%	98.72%
8	Imperial	0	16,591	16,591	1	12,928	12,929	N/A	77.93%	77.93%
9	Kern	13,499	28,092	41,591	10,172	26,913	37,085	75.36%	95.80%	89.17%
10	Kings	16	15,179	15,195	18	13,852	13,869	109.32%	91.26%	91.27%
11	Los Angeles	995,024	3,290	998,314	833,139	1,020	834,159	83.73%	31.01%	83.56%
12	Orange	213,419	8	213,427	146,772	17	146,789	68.77%	0.00%	68.78%
13	Riverside	113,416	134,276	247,691	88,306	111,998	200,304	77.86%	83.41%	80.87%
14	San Bernardino	168,825	915	169,740	154,995	828	155,823	91.81%	90.51%	91.80%
15	San Luis Obispo	10,260	17,496	27,755	3,784	10,910	14,693	36.88%	62.36%	52.94%
16	Santa Barbara	38,191	1,185	39,377	26,564	529	27,093	69.56%	44.62%	68.80%
17	Tulare	11,101	49,833	60,933	11,343	46,750	58,092	102.18%	93.81%	95.34%
18	Ventura	55,879	2,037	57,916	43,569	1,356	44,925	77.97%	66.55%	77.57%
19	Total	1,630,900	268,919	1,899,820	1,329,785	227,121	1,556,906	81.54%	84.46%	81.95%
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 2015 CARE Annual Report CARE Table 6 CARE Recertification Results SOUTHERN CALIFORNIA GAS COMPANY							
2								
3								
4								
5	2015	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	1,564,640	33,484	2.14%	23,984	11,994	71.63%	0.77%
7	February	1,555,969	25,722	1.65%	16,792	10,052	65.28%	0.65%
8	March	1,556,961	32,625	2.10%	20,847	13,388	63.90%	0.86%
9	April	1,562,481	24,688	1.58%	16,635	9,539	67.38%	0.61%
10	May	1,568,265	23,023	1.47%	15,418	8,637	66.97%	0.55%
11	June	1,564,499	24,701	1.58%	16,229	9,247	65.70%	0.59%
12	July	1,563,296	24,485	1.57%	15,628	9,393	63.83%	0.60%
13	August	1,558,172	23,200	1.49%	14,446	9,124	62.27%	0.59%
14	September	1,556,125	25,387	1.63%	15,355	10,460	60.48%	0.67%
15	October	1,562,709	15,870	1.02%	9,100	7,037	57.34%	0.45%
16	November	1,558,318	499	0.03%	347	182	69.54%	0.01%
17	December	1,556,906	58,184	3.74%	34,866	23,473	59.92%	1.51%
18	YTD Total	1,556,906	311,868	20.03%	199,647	122,526	64.02%	7.87%

	A	B	C	D	E	F	G	H
1	PY 2015 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	0	0
13	LA Works		X			0	0	0
14	Children’s Hospital of Orange County		X			0	0	0
15	The Companion Line		X			0	0	0
16	Across Amer Foundation		X			0	0	0
17	All Peoples Christian Center		X			0	0	0
18	LA County 211		X			0	0	0
19	YMCA Montebello-Commerce		X			0	0	0
20	Sr. Citizens Emergency Fund I.V., Inc.		X			0	0	0
21	Coachella Valley Housing Coalition		X			0	0	0
22	HABBM		X			0	0	0
23	Second Harvest Food Bank of Orange County		X			0	0	0
24	Southeast Community Development Corp.		X			0	0	0
25	Latino Resource Organization		X			0	0	0
26	Independent Living Center of Southern California		X			0	0	0
27	Community Action Partnership - Kern County		X			0	0	0
28	El Concilio del Condado de Ventura		X			0	0	0
29	Ventura Cnty Comm Human		X			0	0	0
30	Blessed Sacrament Church		X			0	0	0
31	Starbright Management Services		X			0	0	0
32	Hermandad Mexicana		X			0	0	0
33	CSET		X			0	0	0
34	Crest Forest Family and Community Service		X			0	0	0
35	CUI – Campesinos Unidos, Inc.		X	X	X	0	0	0
36	Veterans in Community Service		X	X	X	0	0	0
37	Chinatown Service Center		X			0	0	0
38	Koreatown Youth and Community Center		X			0	0	0
39	MEND		X			0	0	0
40	Armenian Relief Society		X			0	0	0
41	Catholic Charities of LA – Brownson House		X			0	0	0
42	BroadSpectrum		X			0	0	0
43	OCCC, Inc. (Orange County Community Center)		X			0	0	0
44	Green Light Shipping	X				0	0	0
45	APAC Service Center		X			0	22	22
46	Visalia Emergency Aid Council		X			0	0	0
47	Total Enrollments and Expenditures					0	22	22
48								
49	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 2015 CARE Annual Report CARE Table 8 CARE Participants per Month SOUTHERN CALIFORNIA GAS COMPANY							
2								
3								
4								
5	2015	Gas and Electric	Gas Only	Electric Only	Total	Eligible Households	Penetration Rate	% Change ^{1, 2}
6	January	N/A	1,564,640	N/A	1,564,640	1,894,881	82.57%	-0.21%
7	February	N/A	1,555,969	N/A	1,555,969	1,894,881	82.11%	-0.55%
8	March	N/A	1,556,961	N/A	1,556,961	1,899,163	81.98%	0.06%
9	April	N/A	1,562,481	N/A	1,562,481	1,899,163	82.27%	0.35%
10	May	N/A	1,568,265	N/A	1,568,265	1,899,163	82.58%	0.37%
11	June	N/A	1,564,499	N/A	1,564,499	1,898,272	82.42%	-0.24%
12	July	N/A	1,563,296	N/A	1,563,296	1,898,272	82.35%	-0.08%
13	August	N/A	1,558,172	N/A	1,558,172	1,898,272	82.08%	-0.33%
14	September	N/A	1,556,125	N/A	1,556,125	1,899,820	81.91%	-0.13%
15	October	N/A	1,562,709	N/A	1,562,709	1,899,820	82.26%	0.42%
16	November	N/A	1,558,318	N/A	1,558,318	1,899,820	82.02%	-0.28%
17	December	N/A	1,556,906	N/A	1,556,906	1,899,820	81.95%	-0.09%
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 2015.							

	A	B	C	D
1	PY 2015 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	24.26	8.95	33.21
10	CARE	19.11	4.62	23.73
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				
18				
19				
20				
21				
22				
23				
24				
	Average Monthly Gas / Electric Bill			
	Residential Non-CARE vs. CARE Customers¹			
	(Dollars per Customer)			
	Customer	Gas	Electric	
	Non-CARE	\$34.50	N/A	
	CARE	\$25.22	N/A	
	¹ Excludes master-meter usage.			

	A	B	C	D	E	F
1	PY 2015 CARE Annual Report CARE Table 10 CARE Surcharge & Revenue SOUTHERN CALIFORNIA GAS COMPANY					
2						
3						
4						
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	\$1.07	\$34.50	3.10%	\$50,336,266	41.11%
22	Commercial	\$13.89	\$230.98	6.01%	\$31,069,278	25.38%
23	NG Vehicle	\$812.12	\$9,393.80	8.65%	\$4,222,226	3.45%
24	Industrial	\$179.18	\$768.90	23.30%	\$36,810,130	30.06%
25	Note: Industrial includes both G-NT(D) and G-NT(T) and is net of volumes qualifying for G-COG.					
26						

	A	B	C	D	E	F
1	PY 2015 CARE Annual Report CARE Table 11 CARE Capitation Applications SOUTHERN CALIFORNIA GAS COMPANY					
2						
3						
4						
5	Entity	Total Received	Approved	Denied	Pending/ Never Completed	Duplicate
6	Orange County CDC	0	0	0	0	0
7	ELA Communications	0	0	0	0	0
8	PACE-PacAsianConEmploy	0	0	0	0	0
9	Proteus	0	0	0	0	0
10	Cmty Pantry of Hemet	0	0	0	0	0
11	Cmty Svcs SBDO County	0	0	0	0	0
12	Childrens Hospital of OC	0	0	0	0	0
13	New Beginning Outrch Inc	0	0	0	0	0
14	Sr Citizen Emergency Fund	0	0	0	0	0
15	HABBM	0	0	0	0	0
16	2nd Harvest Food Bank OC	0	0	0	0	0
17	Latino Resrce Organizatn	0	0	0	0	0
18	Indepnt Living Center So Cal.	0	0	0	0	0
19	SoEast Comm Dev Corp	0	0	0	0	0
20	El Concilio-Cdo Ventura	0	0	0	0	0
21	Blessed Sacrament Church	0	0	0	0	0
22	Hermanadad Mexicana	0	0	0	0	0
23	Starbright Mgmt Services	0	0	0	0	0
24	Crest Forest Family Cmty	0	0	0	0	0
25	Campesinos Unidos, Inc.	0	0	0	0	0
26	Chinatown Svce Center	0	0	0	0	0
27	Meet Ea Need W / Dignity	0	0	0	0	0
28	Armenian Relief Society	0	0	0	0	0
29	Cath Char Bronson House	0	0	0	0	0
30	CSET	0	0	0	0	0
31	Orange County Comm Ctr (OCCC)	0	0	0	0	0
32	Green Light Shipping	0	0	0	0	0
33	Koreatown Youth and Comm Ctr	0	0	0	0	0
34	Apac Service Center	52	22	2	0	28
35	Visalia Emergency Aid Council	0	0	0	0	0
36	The Companion Line	0	0	0	0	0
37	Across Amer Foun	0	0	0	0	0
38	All Peoples Christian	0	0	0	0	0
39	LA Works	0	0	0	0	0
40	LA County 211	0	0	0	0	0
41	Coachella Valley Housing Coalition	0	0	0	0	0
42	TOTAL	52	22	2	0	28

	A	B
1	PY 2015 CARE Annual Report CARE Table 14 Categorical Enrollment SOUTHERN CALIFORNIA GAS COMPANY	
2		
3		
4		
5	Type of Enrollment	Number of Customers Enrolled ¹
6	Women, Infants, and Children Program (WIC)	38,172
7	Supplemental Security Income (SSI)	19,315
8	CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	53,621
9	CalWORKs/Temporary Assistance for Needy Families (TANF)	15,200
10	Tribal TANF	N/A
11	Medicaid/Medi-Cal	106,543
12	Healthy Families A&B	19,863
13	National School Lunch Program (NSLP) - Free Lunch	35,584
14	Low-income Home Energy Assistance Program (LIHEAP)	10,218
15	Bureau of Indian Affairs General Assistance	190
16	Head Start Income Eligible - (Tribal Only)	876
17	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.	
18		