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**SOUTHERN CALIFORNIA GAS COMPANY (U-904-G)
FOURTEENTH ANNUAL PROGRESS REPORT ON THE
CALIFORNIA ALTERNATE RATES FOR ENERGY PROGRAM
JANUARY 2002 – DECEMBER 2002**

May 1, 2003

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CARE PROGRESS REPORT RESIDENTIAL AND EXPANDED PROGRAMS

January 1, 2002 through December 31, 2002

CARE RESIDENTIAL PROGRAM

Individual and Submetered Participants (Tenants of Qualifying Master-Metered Customers)

I. Participant Information

A. Provide the total number of residential CARE customers, including submetered tenants, by month, by energy source, for the reporting period.

See Table 1.

TABLE 1		
Residential CARE Program Gas Customers by Month		
PY2002	CARE Customers	Percentage Change
Jan	659,558	0.63%
Feb	666,450	1.04%
Mar	692,958	3.98%
Apr	718,541	3.69%
May	731,963	1.87%
Jun	743,042	1.51%
Jul	751,685	1.16%
Aug	760,600	1.19%
Sep	775,288	1.93%
Oct	777,763	0.32%
Nov	785,678	1.02%
Dec	790,592	0.63%

As of December 2002, 790,592 residential customers were receiving CARE benefits. This represents a 21% increase from the 2001 year-end CARE participation of 655,466 customers.

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

SoCalGas did not experience any month-to-month variations in CARE customer participation of more than five percent in 2002.

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

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

The 2002 eligibility rate estimates was based on the Commission-approved methodology in Decision No. (D.) 01-03-28. The energy utilities (including SoCalGas) jointly contracted with Athens Research to estimate the CARE-eligible customers in each utility's service area.

Briefly, CARE eligibility at the zip code level was calculated using the Public Use Microdata Samples (PUMS) 1990-based cross tabulations of income categories by household size adjusted to match Applied Geographic System's (AGS') 2001 distributions of household size and incomes. Then, the counts of technically eligible meters by utility, by county, by commodity, were used to tailor eligibility to reflect the geographic areas actually served by the energy utilities.

There were no differences in the methodology used pre-June 1st and post-June 1st in estimating demographic CARE-eligibility rates for SoCalGas. Nor, at the request of the Commission, were eligibility rates updated mid-year.

2. Describe how the estimates of current CARE-eligible meters were derived. Explain how total residential meters were adjusted to reflect CARE-eligible meters (including submetered tenants) and CARE-ineligible meters (i.e., master meters that are not submetered or other residential meter configurations that do not provide residential service.)

The counts of all active residential meters and residential submetered units, minus residential meters with billing tariffs that do not qualify for CARE, were used to derive the number of CARE-eligible meters (i.e. households). By using tariff rates as the criteria for counting, non-eligible

master metered accounts were not included in the CARE eligible meter count.

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

Estimated CARE-eligible rates developed as described by B.1 response above were applied to the count of current CARE-eligible meters developed as described by B.2 response above to the estimated number of CARE-eligible households.

4. Describe how current CARE customers were counted.

Residential non-submetered CARE customers are billed on separate CARE rate schedules. Monthly, SoCalGas counts the CARE customers by tallying the number of residential customers billed each month on the CARE rate.

Although the residential submetered customers are not billed individually by SoCalGas, SoCalGas maintains the information of all participating tenants in the submetered facility. The submetered CARE customer count was tallied and reported monthly.

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

CARE-participating residential households were divided by the estimated number of CARE-eligible households to calculate a penetration rate.

C. Provide the total number of CARE residential customers, CARE-eligible households, and CARE participation rates, by energy source, by quarter.

See Table 2.

TABLE 2			
CARE Residential Penetration Rate			
Gas			
2002 Quarter Ending	CARE Residential Customers	CARE-Eligible Customers	CARE Penetration Rate
March 31	692,958	1,088,672	63.7%
June 30	743,042	1,089,804	68.2%
September 30	775,288	1,092,346	71.0%
December 31	790,592	1,097,616	72.0%

As a result of SoCalGas' mass media campaigns, community events, CARE process improvements, and its community-based organization partnerships, SoCalGas increased its net CARE participation by 135,147 customers in 2002. Compared to the 2001 year-end penetration rate of 60.1%, the penetration rate was increased by almost 10% to 72% at the year-end 2002.

D. 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 2002, 22.4% of SoCalGas' residential meters were eligible for the CARE discount on their monthly gas bills.

E. Provide the estimates of current CARE-eligible submetered tenants of master-meter customers by energy source at year-end.

At year-end 2002, SoCalGas had 144,030 submetered tenants in 1,841 master-meter facilities. Assuming 22.4% of its residential customers are eligible for CARE, SoCalGas estimates that 32,199 of its submetered tenants are CARE-eligible.

F. Provide the current CARE submetered tenant counts by energy source at year-end.

SoCalGas had 27,454 CARE submetered customers at year-end 2002.

G. Provide the current CARE submetered tenant penetration rates by energy source at year-end.

SoCalGas estimates that 85.3% of its CARE-eligible submetered customers were enrolled in the CARE Residential Program at year-end 2002.

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

SoCalGas did not encounter any significant problems in administering the CARE program for its submetered tenants or master meter customers in 2002.

Awareness of the CARE program among SoCalGas' submetered customers improved in 2002. As a result of Senate Bill 920¹, SoCalGas mailed the Managers of its submetered accounts notifying them of their responsibility to educate their tenants annually about the CARE program. The package included explanatory materials about CARE benefits, program requirements, and other information. SoCalGas experienced an increase in the number of phone calls and CARE applications from submetered tenants.

SoCalGas sends re-certification applications directly to submetered tenants in June and July timeframe. Before this direct mailing, it contacts affected landlords/managers of the master-metered facilities to inform them of the mailing and provide them with background information.

Occasionally, SoCalGas receives calls from submetered tenants regarding non-receipt of the CARE discount on their bills. SoCalGas will then facilitate communications between the landlord/manager and submetered tenants. It has been our objective that landlords/managers understand their responsibilities and that eligible customers receive the CARE benefit.

II. Usage and Bill Information

A. Provide a comparison of CARE and non-CARE residential usage by Baseline and Non-Baseline, excluding usage of residential master-meter customers, by energy source.

See Table 3.

¹ The bill requires the management of a master-meter mobilehome park to give written notice by February 1 of each year to homeowners and residents in their utility billing statements about assistance to low-income persons for utility costs available under the California Alternate Rates for Energy (CARE) program. The notices would be required to include specified information regarding the CARE program.

TABLE 3			
Average Monthly Gas Usage Residential Non-CARE vs. CARE Customers			
Customer	Gas Therms Baseline	Gas Therms Non-Baseline	Total
Non-CARE	29.5	17.1	46.6
CARE	21.1	8.7	29.8

B. Provide a comparison of the average monthly bill for CARE and non-CARE residential customers, excluding bills of master-meter residential customers, by energy source.

See Table 4.

TABLE 4	
Average Monthly Gas Bill Residential Non-CARE vs. CARE Customers (Dollars per Customer)	
Customer	Gas
Non-CARE	\$32.74
CARE	\$17.50

III. Program Costs

A. Discount Cost

1. State the average monthly CARE discounts received, in dollars per CARE customer, by energy source.

The average monthly discount received per SoCalGas CARE customer in 2002 was \$4.68 per month.

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

SoCalGas CARE customers received \$41,382,606 in natural gas rate discounts and \$2,763,975 in Service Establishment Charge discounts in 2002. The 2002 annual subsidy for all SoCalGas CARE customers exceeded \$44 million.

B. Administrative Cost

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

See Table 5.1 and 5.2.

TABLE 5.1	
CARE Residential Program CARE Costs and Reporting Classifications	
Category	Cost
Outreach	\$1,140,465
Processing, Certification and Verification	\$653,354
Billing System/Programming	\$200,912
Measurement and Evaluation	\$0
Regulatory Compliance	\$78,258
General Administration	\$163,873
LIAB Funding	\$0
CPUC Energy Division Staff Funding	\$80,236
Total Program Costs	\$2,317,098
Subsidies and Benefits – Rate Discounts, SEC discounts	\$44,146,581
Merger Credit	\$400,000
TOTAL PROGRAM COSTS AND CUSTOMER DISCOUNTS	\$46,863,679

Table 5.2 * CARE SBX15	
CARE Costs and Reporting Classifications	
Category	Cost
Capitation Outreach	\$765,223
Outreach	\$32,423
Mass Media	\$483,150
Processing/Certification/Verification	\$111,689
Billing System/Programming	\$358,460
Regulatory Compliance	\$49,186
Other Administration	\$4,554
TOTAL PROGRAM COSTS	\$1,804,685

* The costs in the table 5.2 were for the Rapid Deployment Program, a one-time state-funded program to increase the CARE participation.

Grand Total for Base and Rapid Deployment Programs \$48,668,364

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

Outreach: Costs included in outreach consisted of all CARE applications/documents; bill inserts; community event sponsorships and support, the labor and non-labor costs of printing and mailing of applications; brochures; flyers; postage; submetered, non-profit customer notification; Call Center labor; outreach staff labor; and other outreach and enrollment efforts.

Capitation Outreach: Costs included in Capitation Outreach consisted of the support and compensation fee to the third party, community based organizations assisting SoCalGas enroll hard-to-reach CARE-eligible customers in the program.

Mass Media: In 2002, SoCalGas launched several mass media campaigns targeting the non-English-speaking customers. The campaigns included advertisements in various Spanish, Chinese, Korean, and Vietnamese newspapers and radio stations.

Processing, Certification and Verification: Costs included in this category include labor costs of CARE Administration Group and the miscellaneous stationary used by the group. The function of the CARE group includes: 1) opening and sorting the CARE application forms; 2) processing all CARE applications; 3) initiating and responding to customers' inquiries on the CARE applications/programs; 4) tracking the CARE enrollment and operating statistics in support of operations, management, and regulatory reporting; 5) supporting the CARE outreach activities and, 6) occasionally, participate in the special projects such as process improvements.

Billing System/Programming: Costs included are IT staff costs to maintain the CARE billing system and its database, such as functionality on system reports, continue the data exchange with SCE, and undertake system enhancements to comply with CPUC mandates.

Measurement and Evaluation: Costs for measurement and evaluation include expenses for the Needs Assessment Study and customer satisfaction survey. SoCalGas did not incur any expenses in this category for 2002.

Regulatory Compliance: These costs include the preparation and filing of Program Applications, Advice Filings, Comments and Reply Comments, and Tariff Revisions; preparing reports and studies; attending working group meetings, public input meetings and other CPUC hearings or meetings.

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

LIAB Funding: SoCalGas did not incur any expenses in this category for 2002.

CPUC Energy Division Staff Funding: This category of expenses covers the program management and staff support provided by the Energy Division for low-income program implementation.

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

The CARE balancing account was under-collected by almost \$28 million at year-end 2002 primarily due to Board of Equalization reimbursement owed to SoCalGas.

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

All rate discounts, SEC discounts, surcharge revenues, interest and amortization, and merger credits are recorded to the CARE balancing account. The administrative costs as described in B.1 and B.2 above are also recorded to the CARE balancing account except cost for corporate services (e.g., Legal Department services and Regulatory Department services).²

CARE program costs recorded in the CARE balancing account are not included in the base rates and are recovered via the public purpose program (PPP) rate.

E. 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 Table 6.

TABLE 6					
CARE Surcharge and Revenue Collected by Customer Class – Gas					
Customer Class	Average Monthly CARE Surcharge	Average Monthly Bill	CARE Surcharge as Percent of Bill	Total CARE Surcharge Revenue Collected	Percentage of CARE Surcharge Revenue Collected
Residential	\$0.807	\$32.74	2.46%	\$40,197,587	46.82%
Core C & I	\$7.130	\$218.42	3.26%	\$17,942,448	20.90%
Non-Core C & I	\$2,637.408	\$5,315.31	49.62%	\$27,724,434	32.29%

² All of the SBX1 5 (Rapid Deployment) costs are NOT recorded to the CARE balancing account, but recorded to a separate account – a Miscellaneous Work Order (MWO).

IV. Outreach

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

SoCalGas undertook numerous internal and external actions in 2002 to increase CARE participation. Using internal resources, SoCalGas launched mass media campaigns; had public affairs and other personnel participate in community events; used its Call Center to promote the CARE program; used bill inserts, bill messages, and its bill envelope to promote the CARE program. Using external resources, SoCalGas leveraged its community-based organizations' partnerships, and worked with the LIOB and CSD to increase its net CARE participation by 135,147 customers in 2002. These activities are described in detail below.

1. Utility Outreach Activity

Customer Contact Personnel -

- Customer Contact Call Center: customers are offered the CARE program when they call to initiate service, request payment arrangements, or change the name on the account. CARE is part of the on-hold and Interactive Voice Response Messages on customer service lines.
- Bilingual Employees: Customer Contact Call Center, most company business offices, and CARE administration are staffed with bilingual CSRs (English/Spanish). In addition to Spanish-speaking CSRs, the Call Center is also staffed with CSRs who speak Vietnamese, Korean, and Chinese.
- Utility Field Personnel: SoCalGas' Customer Assistance program brochures, which include information about how to enroll in the CARE program, are hand delivered to residential customers at every turn-on (start-up of service), service order, high bill investigation, and bill collection.
- Community/Employer Presentations: SoCalGas employees inform and update local governments and interested organizations about SoCalGas' customer assistance programs including the CARE program.

Bill Insert – SoCalGas sends a CARE bill insert twice a year to all non-CARE residential customers and annually to all non-CARE commercial customers to notify them about the CARE program.

Bill Message – SoCalGas printed quarterly CARE bill messages in English and Spanish.

Direct Mailing to Mobile Home Parks –

- The SB920 mailing to approximately 1,400 mobile home parks prompted increased program participation.
- Commissioner Wood's office requested data to determine CARE penetration in Housing of California Facilities by a direct mailing of a letter of explanation on the CARE program and a CARE application to over 8,000 residential customers.

Cross Program Promotion -

- SoCalGas' Direct Assistance Program (DAP) applications include CARE signature block so that applicants can apply for both programs simultaneously.
- SoCalGas' Gas Assistance Fund (GAF) customer data are used to recertify or verify CARE eligibility.
- CARE information is included in DAP energy education workshop brochure.
- CARE information is included in the Energy Efficiency general program, Diverse Market Outreach Program (DMOP) brochures.
- CARE program is one of the recommendations in the Residential Home Energy Audit Program report.

Media Campaigns -

- SoCalGas had four major non-English mass media campaigns for the CARE program in 2002: for the three Asian languages, the campaigns were conducted in July 2002; the Spanish-language campaign was conducted in September 2002.
- Newspaper: SoCalGas promoted the CARE program in numerous Chinese, Spanish, Korean, and Vietnamese newspapers; CARE articles were quoted periodically in Chinese, Korean, and English-language newspapers.
- Television: SoCalGas promoted the CARE program via interviews on several local Chinese and Hispanic television stations.
- Radio: SoCalGas promoted the CARE program on several Mandarin, Cantonese, Spanish, Korean, and Vietnamese radio stations.

Community Events -

- Multi-Cultural: During 2002, SoCalGas continued to place an increased emphasis on increasing CARE awareness and enrollment among its ethnic communities. SoCalGas participated in many community events and utilized ethnic media to promote the CARE program. For example, SoCalGas sponsored/supported Asian/Hispanic media campaigns and numerous community events

targeted to its ethnic communities. SoCalGas participated in the Chinese Harvest Moon Festival in Arcadia, the Vietnamese Harvest Moon Festival in Westminster, the “Hangawee” Festival in Koreatown, the Asia-Pacific Festival at LA County Fair, and “Fiestas Patrias”, among others.

- CBOs: As our efforts to enroll the “hard-to-reach” CARE customers continued in 2002, 42 faith-based and community service organizations signed contracts with SoCalGas and were paid a “per applicant” fee for each new qualified enrollment.
- Monthly Activity: SoCalGas’ utility and community outreach activity is shown on Attachment A and Attachment B, “PY2002 SoCalGas CARE Outreach and Leveraging Initiatives” and “PY2002 SoCalGas CARE Media Outreach”.

Local Government Community Events - SoCalGas Public Affair Region Managers inform and update local governments about SoCalGas’ customer assistance programs, including the CARE program.

Web and Informational Brochures -

- CARE program information and application in English, Chinese, and Spanish are available on the SoCalGas Web Site.
- SoCalGas’ customer assistance program brochures are available in five languages: English, Spanish, Korean, Vietnamese, and Chinese. The CARE applications were also available in large print in 2003.
- CARE program is also included in the SoCalGas Energy Efficiency program general brochure.

2. Third Party Outreach Activity

Community-Based Organizations Partnership - 42 community-based organizations work with SoCalGas in partnership to enroll eligible non-participating customers in the CARE program. Several of our community-based organizations conduct door-to-door canvassing to enroll customers in the CARE program.

Leveraging with LIHEAP – SoCalGas and the California Department of Community Services and Development (CSD) have a Letter of Agreement that provides for cross-referral of customers of the LIHEAP and CARE programs to increase enrollments in both programs.

Leveraging with Local Govt. Programs - SoCalGas collaborates with city, county, and federal assistance agencies (e.g. Housing Authority,

CSD/LIHEAP) throughout our service territory to promote the CARE program.

Leveraging with GAF³ - SoCalGas GAF provides an income-qualified customer with a one-time bill credit on a winter bill.⁴ SoCalGas solicits customer contributions for GAF in October and November, and Sempra Energy shareholders match those contributions, generally on a dollar for dollar basis, up to \$250,000. Due to the 911 tragedy, SoCalGas added an additional \$100,000 to assist displace low-income customers. The total SoCalGas contribution for the reporting period was \$350,000. The combined GAF contributions totaled \$462,697 for 2002.

SoCalGas does not administer the GAF Program. United Way administers it on behalf of SoCalGas. United Way collects the contributions and disburses the funds through its network of more than 120 community agencies. SoCalGas' support includes mailing GAF solicitation envelopes with its customer bills. In 2002, SoCalGas was able to assist 6,601 households. The average assistance per customer was \$70.10.

Since the eligibility guidelines for GAF are the same as for the CARE program, customers approved for GAF and are not subject to SoCalGas' post-enrollment random verification process. CARE customers who are scheduled for recertification and who are approved for GAF assistance are not asked to recertify their eligibility again until the next two year recertification cycle has lapsed. This process helps reduce barriers to participation and assists in retaining qualified customers on the program.

B. Discuss each of the following:

1. Most effective outreach method, including a discussion of how success is measured.

SoCalGas believes the most effective, efficient means of CARE outreach is offering the CARE program to all residential customers when they call to: (1) establish service, (2) to move the account, (3) change the name on the account, or (4) has any contact with a service representative regarding payment arrangements. This approach affords direct contact with the

³ GAF is a shareholder-customer funded program that provides bill payment assistance (grants) to income-qualified customers.

⁴ The bill payment assistance is up to \$100.

customer and offers an opportunity for the company to solicit participation in the CARE program.

SoCalGas also offers the CARE program via a recorded message on the on-hold IVR (interactive voice response) messaging system and outbound dialing messages.

Most of the CARE applications were requested because of calls received by the Call Center. There were 566,783 CARE applications mailed in 2002.

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

SoCalGas continued to share new CARE customer enrollment data with SCE in 2002. With SCE occupying a large portion of the same service territory as SoCalGas, a weekly tape data exchange program was established in 2001. This procedure was enhanced in 2002 from the tape exchange to an FTP (file transfer protocol) process, which increased security of data and significantly reduced the time to process enrollments. In PY2002, SoCalGas placed 56,831 SCE-approved customers on the CARE program due to the data exchange.

3. How CARE customer data and other relevant program information is shared within the utility, for example, between its LIEE and other appropriate low-income programs.

CARE Customer Information – Direct Assistance Program (DAP)⁵ third-party outreach workers canvass limited-income areas to find qualifying customers for participation in DAP.

During 2002, DAP third party outreach workers provided customers with energy education materials, including CARE enrollment information, and explained the CARE Program's eligibility requirements. Approximately 42,000 Energy Education packets were distributed to customers participating in DAP.

CARE information was also provided to over 13,000 customers at Energy Education workshops supported by DAP.

⁵ DAP provides low-cost weatherization services to income-qualified customers in qualifying dwelling units.

During 2002, the DAP participants wishing to enroll in CARE can complete the CARE declaration statement thereby enrolling in the CARE program. The customer will no longer need to complete a separate CARE application form and submit it to SoCalGas.

LIHEAP Mailing List –

SoCalGas also utilized LIHEAP energy assistance payment lists to mail CARE applications to 2,023 LIHEAP recipients who were not participating in the CARE program. Of the recipients who received and returned the CARE application, 875 were approved for the CARE program. In addition, LIHEAP customers approved within the past year will not be subject to post-enrollment verification.

4. Attach a copy of the utility's agreement with CSD. 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.

In May 2000, the State of California Department of Community Services and Development (CSD) and SoCalGas entered into an agreement. See Letter Agreement and Contract, shown as Attachment C. This agreement and three year contract solidified the coordination of resources and program benefits between CSD's Low-Income Home Energy Assistance Program (LIHEAP) and SoCalGas' CARE and GAF programs. In June 2000, SoCalGas added the toll-free telephone numbers for the LIHEAP and DAP programs on the CARE applications. At the same time, SoCalGas began providing CSD's toll free number to customers calling SoCalGas to request information on low-income assistance programs.

In 2002, SoCalGas continued to cross-reference information on customers receiving LIHEAP grants during 2002 with its CARE database. This eliminated the need for these LIHEAP customers to complete and submit CARE post-enrollment verification applications and allowed for automatic update of their accounts. SoCalGas also cross-referenced customers receiving LIHEAP services, but not enrolled in the CARE program, and sent those customers a preprinted CARE application with their name, account number, and address.

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

Although 72% of SoCalGas' CARE-eligible customers received the CARE discount by year-end 2002, many eligible customers did not. Reasons eligible customers may not be participating may be lack of knowledge of the program and inability to read about the program. Other customers may be afraid to apply, some may need help to apply, some housing situation may be so unstable as to make it difficult to apply, and others may not wish to apply.

Language – To address the language barrier, SoCalGas CARE applications and Customer Assistance brochure are available in five different languages. SoCalGas collaborated with 42 community-based organizations. This direct contact with people who may qualify will help them overcome barriers and participation in the CARE program.

C. 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.

In 2002, communication with our customers requiring assistance in English or other languages was expanded both in mass media campaigns and one-on-one in community events. Also, the return envelope sent to CARE customers when a Recertification and/or Verification application is mailed, was revised to add a tag line "Response Required" in red ink on the front of the envelope.

CARE management reviews, on a daily basis, the procedures for processing CARE documents to assess backlog, issues, problems, and the like. In 2002, the batch processing area was identified as an area for improvement, and the sorting procedure was reduced to expedite the approval process by redesigning the work desk and work assignments.

V. Processing CARE Applications

**A. Processing Self-Certification and Self-Recertification Applications
(Individual and Submetered Customers)**

1. Provide the total number of third-party CARE applications received, approved, denied, pending/never completed, or duplicates in the reporting period.

See Table 7.

TABLE 7					
CARE Capitation Program					
January 1, 2002 through December 31, 2002					
CARE Applications Submitted					
	Received	Approved⁶	Denied	Pending/Never Completed	Duplicates
Total	87,259	65,152	389	15,353	6,365
Percentage	N/A	74.7%	.4%	17.6%	7.3%

The total approved applications for the “PY2002 Rapid Deployment Report” was reported incorrectly by 32 fewer approved applications.

2. Provide the number of utility CARE self-certification and self-recertification applications provided, received, approved, denied, pending/never completed, or duplicates for the reporting period.

See Table 8.

TABLE 8						
CARE Self-Certification and Self-Recertification Applications						
	Provided	Received	Approved	Denied	Pending/Never Completed	Duplicates
Total	714,170	527,022	421,451	20,304	69,149	16,118
Percentage	N/A	73.8%	80.0%	3.9%	13.1%	3.1%

3. Provide a table showing the number of customers removed from CARE by month due to the recertification process. (Note: Customers

⁶ The total approved applications for the “PY2002 Rapid Deployment Report” was reported incorrectly by 32 fewer approved applications.

may be removed due to a variety of reasons including non-response to a request to recertify, failure to complete the application process, ineligibility, or by customer request due to changed eligibility status.)

See Table 9.

TABLE 9			
Residential CARE Program Customers Removed by Month through Recertification and Post-Enrollment Verification			
2002	Recertification	Post-Enrollment Verification	Total
January	6,922	5,489	12,411
February	5,741	4,780	10,521
March	3,534	4,210	7,744
April	4,027	2,865	6,892
May	4,491	4,283	8,774
June	3,502	5,554	9,056
July	6,212	6,183	12,395
August	4,456	6,007	10,463
September	7,708	5,926	13,634
October	5,676	5,890	11,566
November	4,697	4,886	9,583
December	3,880	6,610	10,490
Total	60,846	62,683	123,529

4. Describe the utility's process for recertifying submetered tenants of master-meter customers.

As SoCalGas has automated its CARE Submetered Program, it can mail customized recertification application forms and instructions directly to submetered tenants.⁷ This is done annually in June.

SoCalGas does this to help reduce the administrative burden on owners/managers. Tenants are then able to directly correspond and respond to SoCalGas.

⁷ That is, the applications contain the name of the facility and the master meter account number on the application form and instructions, as well as the service address.

As a courtesy, SoCalGas sends the owners/managers a sample self-recertification application form and instructions, in both English and Spanish, and provides an 800 number for the owners/managers to call for assistance or information. In addition, SoCalGas provides the owners/managers with extra recertification application forms and instructions, and a list of tenants that received the renewal applications.

B. Processing Random Post-Enrollment Verification Applications

1. Provide the total number of applications mailed, received, approved, denied, pending/never completed, or duplicates, for the reporting period.

See Table 10.

TABLE 10						
CARE Random Post-Enrollment Verification Applications						
	Mailed	Received	Approved	Denied	Pending/Never Completed	Duplicates
Total	136,338	132,058	69,375	1,973	60,710	N/A
Percentage	N/A	96.9%	52.5%	1.5%	46.0%	N/A

2. Provide a table showing the number of customers removed from CARE by month due to the verification process. (Note: Customers may be removed due to a variety of reasons including non-response to a request to verify income, failure to complete the verification process, ineligibility, or by customer request due to changed eligibility status.)

See Table 9.

C. 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 contracts with community based organizations to undertake certification of eligible non-participating customers; these organizations do

not perform actual recertification or verification activities but inform customers about the recertification and verification requirements.

SoCalGas, through its Call Center, is probably more effective in scope and scale of reaching large number of customers who can and will call SoCalGas about the CARE program and ask questions about the program and its eligibility requirements. The community-based organizations are probably more effective in scope and scale of reaching smaller numbers of clients, one-on-one, and explaining to clients who are unable, unwilling, or uninformed and may not contact SoCalGas' Call Center to discuss the CARE program.

In addition, SoCalGas has advantages in accessing mass media advertising and multi-language communications. Community-based organizations, on the other hand, are more adept at door-to-door canvassing and similar forms of customer enrollment. While utility per enrollee costs are generally lower than CBOs, these organizations are more effective in finding and enrolling the "hard to reach" customer.

VI. Program Management

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

- Due to new legislative requirements, Commission mandates, and expected Commission policies to be implemented imminently, significant resources were deployed in 2002 to address administrative, regulatory, and system changes.
- Processing of CARE applications submitted by community-based organizations required commitment of considerable resources to manual intervention and staff training. Fifty percent of the CARE applications received from community-based organization were incomplete or duplicates.
- Community events, media campaigns, and Rapid Deployment/Low-Income Oversight Board reporting resulted in considerable staff overtime.
- Asian/Spanish mass media campaigns resulted in more non-English applications submittals, resulting in extra staff training costs.
- SB920 mailing to approximately 1,400 mobile home parks prompted more phone calls and greater program participation.
- Since the current CARE system could no longer support the legislative program changes, a CARE Redesign Project was initiated to analyze

and recommend implementation alternatives to support a more flexible CARE process.

CARE EXPANSION PROGRAM

This section covers the non-profit homeless shelters and group living facilities, migrant and farm worker housing centers, qualified privately owned employee housing, and qualified non-profit housing for agricultural employees.

I. Participant Information

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

See Table 11.

TABLE 11			
CARE Expansion Program Participating Facilities by Month			
2002	Residential Facilities – Gas	Commercial Facilities – Gas	Total Gas Facilities
January	N/A	643	643
February	N/A	641	641
March	N/A	640	640
April	N/A	647	647
May	N/A	648	648
June	N/A	645	645
July	N/A	649	649
August	N/A	653	653
September	N/A	661	661
October	N/A	663	663
November	N/A	663	663
December	N/A	664	664

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

As of December 31, 2002, there were almost 4,186 residents in the non-residential CARE Expansion Program facilities. There were 664 primary facilities with 144 associated satellites participating in the CARE Expansion Program at year-end 2002.

II. Usage Information

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

See Table 12.

TABLE 12	
CARE Expansion Program Average Monthly Gas Usage	
Type of Facility	Gas Therms
Residential Facilities	Not Applicable
Commercial Facilities	283.6

In 2002, the average monthly gas usage at each facility was 284 therms.

III. Program Costs

A. Administrative Cost

1. Show the CARE Expansion Program's administrative cost by category.

Costs are not recorded separately from the regular CARE Program.

B. Discount Information

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

SoCalGas does not have residential accounts on the CARE Expansion Program.

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

The annual discount received per participating CARE Expansion Program facility in 2002 was \$261.57.

IV. Outreach

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

1. Utility Outreach

A CARE bill insert on the CARE Expansion Program was sent to all non-participating commercial customers in December 2002.

SoCalGas responded to Commissioner Wood's request to expand CARE penetration in the non-profit sector by working with the California Housing Facilities by conducting a direct mailing explaining the CARE program and including CARE Expansion Program application form to 83 non-profit accounts.

Public Affairs met with SoCalGas' internal Community Affairs Advisory Council, group of community leaders and advisors to the company, to inform it about its CARE program activities. This practice has been on-going since 2000.

Non-residential group living facilities are informed about the CARE program by the Call Center at the time of service establishment.

2. Third Party Outreach

SoCalGas met with the City of Los Angeles Housing Authority to explain the non-residential CARE program.

Non-profit group living facilities are often affiliated with social service networks that share information about programs like to CARE. These networks are effective in communicating the availability of customer assistance programs.

SoCalGas met recently (2003) with the City of Los Angeles' Department of Water and Power (LA DWP) to assist LA DWP develop its own non-residential low-income discount program.

B. Discuss each of the following:

1. Most effective outreach method, including a discussion of how success is measured.

SoCalGas believes the most effective outreach methods for the CARE Expansion Program's non-residential facilities is the current notification at the time of service establishment in conjunction with the networks as mentioned above. SoCalGas currently has no formal mechanism in place to measure the success of specific outreach methods.

2. How the CARE facility data and relevant program information is shared by the utility with other utilities sharing its service territory.

SoCalGas is planning to provide SCE and SDG&E with information on facilities that are participating in the CARE Expansion Program in 2003.

3. Barriers to participation encountered in the prior year and steps taken to mitigate these, if feasible, or not, if infeasible.

Some of the barriers to program participation are difficulties in finding eligible non-participating facilities and assisting staff in completing the recertification process.

SoCalGas continues to send bill inserts to non-profit group living facilities, but in recent years its enrollment in this program has remained stable. SoCalGas finds it difficult to locate and directly communicate with eligible, non-participating facilities. SoCalGas past experience with state agencies and direct mailings has not resulted in significantly increased enrollment among non-profit facilities. SoCalGas continues to seek and assist all eligible non-profit group living facilities for the CARE Expansion Program.

When facilities delay in responding to recertification requests, SoCalGas continues to contact the facilities' staff to determine if additional assistance is required to keep the facility enrolled. SoCalGas finds that staff seems to have greatest difficulty in complying with the recertification requirement affirming that residents "quality of life" has been improved as a result of participation in the CARE Expansion Program.

C. 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.

The CARE Expansion Program, by its nature, is costly and time intensive. Because there can be multiple facilities (a "mother ship and satellites") staff turnover and/or reliance on volunteers at faith-based organizations, CARE personnel must often develop an intimate knowledge of each facility/staff and their unique situation/circumstances. This may mean the facility staff is trained/re-trained on the program/its requirements, particularly given the annual recertification requirements. When a mailing is sent to the primary facility, a satellite may actually complete the application. A lot of time can be spent overseeing the process, particularly if a completed application is desired.

V. Processing CARE Applications

A. Processing Self-Certification and Self-Recertification Applications

1. Provide the total number of third-party CARE Expansion program applications received, approved, denied, pending/never completed, or duplicates.

During 2002, SoCalGas did not received any third-party CARE Expansion program application. The third-party outreach focus is on residential customer enrollment rather than group facility enrollment.

2. Provide the total number of utility CARE Expansion program applications received, approved, denied, pending/never completed, or duplicates for the reporting period.

See Table 13.

TABLE 13					
CARE Expansion Program Self Certification and Self Recertification					
Entity	Received	Approved	Denied	Pending/Never Completed	Duplicates
SoCalGas	56	53	2	1	0
Total	56	53	2	1	0
Percentage	Not Applicable	94.4%	2.6%	0%	0%

B. 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.

During 2002, SoCalGas did not have specific contracts with outreach agencies to conduct certification, recertification, or verification on the utility's behalf. Contractors are aware of the Expansion program that was provided during the training for the residential program.

VI. Program Management

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

Aside from managing recertifications (discussed in IV. C. above), there were no additional issues or events in SoCalGas CARE Expansion Program in 2002.

ATTACHMENT A

PY2002 SoCalGas
CARE Outreach/Leveraging Initiatives

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Mexican American Opportunity Foundation	Provided 500 postage-paid self-mailer applications	December 17, 2002	Direct – No cost
Catholic Charities of Orange County	Provided 400 postage-paid self-mailer applications	December 11, 2002	Direct – No cost
Winegard Energy	Provided 2,100 postage-paid self-mailer applications	December 11, 2002	Direct – No cost
Catholic Charities of San Bernardino/Riverside	Provided 4,200 postage-paid self-mailer applications	November 26, 2002	Direct – No cost
Proteus Inc	Provided 1,000 postage-paid self-mailer applications	November 7, 2002	Direct – No cost
Catholic Charities of Orange County	Provided 200 postage-paid self-mailer applications	November 5, 2002	Direct – No cost
Winegard Energy	Provided 10,500 postage-paid self-mailer applications	October 29, 2002	Direct – No cost
Catholic Charities – Bronson House	Provided 2,000 postage-paid self-mailer applications	October 29, 2002	Direct – No cost
Housing & Community Development Department – County of Orange	Provided 9,200 postage-paid self-mailer applications and customer assistance brochures for the distribution to customer who receives the housing assistance.	October 23, 2002	Direct – No cost
Maravilla Foundation	Provided 100 postage-paid self-mailer applications	October 23, 2002	Direct – No cost
Catholic Charities of San Bernardino/Riverside	Provided 5,000 postage-paid self-mailer applications	October 22, 2002	Direct – No cost
Blessed Sacrament Church Office of Social Services	Provided 250 postage-paid self-mailer applications	October 1, 2002	Direct – No cost
Lake Elsinore Business Expo	Distributed approx. 500 postage-paid self-mailer applications and customer assistance brochures	September 14, 2002	Direct – No cost

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CARE Initiative	Summary	Timeline	Status/Results/Cost
Korean-American Seniors Assoc.	Provided 600 postage-paid self-mailer applications and customer assistance brochures	September 13, 2002	Direct – No cost
Philippine Arts & Culture Event	Distributed approx. 1,00 postage-paid self-mailer applications and customer assistance brochures	September 7 thru September 8, 2002	Direct – No cost
Catholic Charities of L.A. – Bronson House	Provided 500 postage-paid self-mailer applications	September 4, 2002	Direct – No cost
Winegard Energy	Provided 7,200 postage-paid self-mailer applications	September 3, 2002	Direct – No cost
Orange County CDC	Provided 400 postage-paid self-mailer applications	September 3, 2002	Direct – No cost
Fresh Start Housing	Provided 500 postage-paid self-mailer applications	August 30, 2002	Direct – No cost
Mexican American Opportunity Foundation	Provided 500 postage-paid self-mailer applications	August 26, 2002	Direct – No cost
Buena Park Senior Center	Distributed over 100 postage-paid self-mailer applications	August 24, 2002	Indirect – \$150
Catholic Charities of L.A. – Bronson House	Provided 500 postage-paid self-mailer applications	August 22, 2002	Direct – No cost
Abrazar, Inc.	Provided 100 postage-paid self-mailer applications and instructions on how customers should complete the form.	August 16, 2002	Direct – No cost
Catholic Charities El Santo Mino	Provided 500 postage-paid self-mailer applications	August 14, 2002	Direct – No cost
OCCC, Inc #81	Provided 500 postage-paid self-mailer applications	August 1, 2002	Direct – No cost
Over 40 Agencies	Approximately 22,000 postage-paid self-mailer applications with the new income guidelines were provided	June 25 thru July 24, 2002	Direct – No cost
Winegard Energy, Duarte	Provided 6,300 postage-paid self-mailer applications	June 7, 2002	Direct – No cost

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CARE Initiative	Summary	Timeline	Status/Results/Cost
Orange County Community Development Council, Santa Ana	Provided 300 postage-paid self-mailer applications	June 5, 2002	Direct – No cost
ABC Unified School District	Distributed approximately 125 postage-paid self-mailer applications along with the Customer Assistance Brochure in English, Spanish, Korean, Vietnamese, and Chinese. Also distributed were give-aways bearing the SoCalGas' CARE 800 number	May 31,2002	Indirect – No cost
Second Annual Serena Mother & Daughter Conference	Distributed postage-paid self-mailer applications along with the Customer Assistance Brochure in English, Spanish, Korean, Vietnamese, and Chinese to families of 15 different schools that participated. Also distributed were give-aways bearing the SoCalGas' CARE 800 number	May 19, 2002	Indirect – No cost
Monrovia's Soap Box Classic/Environmental Conservation Fair	Distributed approximately 500 postage-paid self-mailer applications along with the Customer Assistance Brochure in English, Spanish, Korean, Vietnamese, and Chinese. Also distributed were give-aways bearing the SoCalGas' CARE 800 number	May 18,2002	Indirect – No cost
Frest Start Housing	Provided 100 postage-paid self-mailer applications	May 8, 2002	Direct – No cost
San Dimas Senior Citizen Center	Distributed approximately 100 postage-paid self-mailer applications along with the Customer Assistance Brochure in English, Spanish, Korean, Vietnamese, and Chinese.	May 7,2002	Indirect – No cost
Catholic Charities – El Santo Nino	Provided 800 postage-paid self-mailer applications	May 6, 2002	Direct – No cost
Winegard Energy, Duarte	Provided 12,800 postage-paid self-mailer applications	May 6, 2002	Direct – No cost

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Catholic Charities of Bronson House, Los Angeles (New Vendor – Contract signature pending)	Provided 100 postage-paid self-mailer applications	Apr. 24, 2002	Direct – No cost
El Concilio Del Condado De Ventura, Oxnard	Provided 100 postage-paid self-mailer applications	Apr. 23, 2002	Direct – No cost
Earth Day Expo, Los Angeles Zoo	Distributed approximately 4,000 postage-paid self-mailer applications along with the Customer Assistance Brochure in English, Spanish, Korean, Vietnamese, and Chinese.	Apr. 20, 2002	Indirect – No cost
Arroyo Vista Health Fair Expo, Lincoln Heights	Distributed approximately 125 postage-paid self-mailer applications along with the Customer Assistance Brochure in English, Spanish, Korean, Vietnamese, and Chinese. Also distributed were give-aways bearing the SoCalGas' CARE 800 number	Apr. 20, 2002	Indirect – \$100
Arroyo Vista Health Fair Expo, Lincoln Heights	Distributed approximately 300 postage-paid self-mailer applications along with the Customer Assistance Brochure in English, Spanish, Korean, Vietnamese, and Chinese. Also distributed were give-aways bearing the SoCalGas' CARE 800 number	Apr. 19, 2002	Indirect – \$325
Catholic Charities of Santa Barbara, Santa Barbara	Provided 50 postage-paid self-mailer applications	Apr. 17, 2002	Direct – No cost
Orange County Community Development Council, Santa Ana	Provided 200 postage-paid self-mailer applications	Apr. 16, 2002	Direct – No cost
Office of Samoan Affairs - Carson	Provided 100 postage-paid self-mailer applications	Apr. 12, 2002	Direct – No cost

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CARE Initiative	Summary	Timeline	Status/Results/Cost
El Concilio Del Condado De Ventura, Oxnard	Provided 100 postage-paid self-mailer applications	Apr. 10, 2002	Direct – No cost
Proteus, Inc. , Visalia	Provided 2,100 postage-paid self-mailer applications	Apr. 4, 2002	Direct – No cost
Winegard Energy, Duarte	Provided 10,500 postage-paid self-mailer applications	Apr. 3, 2002	Direct – No cost
San Bernardino Valley College – Earthquake Event	Provided 300 postage-paid self-mailer applications, 300 Customer Assistance Program (CAP) brochures in English, and 300 CAP brochures in Spanish	March 27, 2002	Direct – No cost
Society of St. Vincent De Paul, Santa Clarita	Provided 200 postage-paid self-mailer applications	March 20, 2002	Direct – No cost
Orange County Community Development Council, Santa Ana	Provided 300 postage-paid self-mailer applications	March 12, 2002	Direct – No cost
Candelaria American Indian Council, Ventura	Provided 100 postage-paid self-mailer applications	March 8, 2002	Direct – No cost
Pacific Asian Consortium Employment, Los Angeles	Provided 300 postage-paid self-mailer applications	March 3, 2002	Direct – No cost
Winegard Energy, Duarte	Provided 10,500 postage-paid self-mailer applications	March 3, 2002	Direct – No cost
Catholic Charities – El Santo El Nino Community Center, Los Angeles	Provided 100 postage-paid self-mailer applications	Feb. 27, 2002	Direct – No cost
Blessed Sacrament Church, Hollywood	Provided 100 postage-paid self-mailer applications	Feb. 27, 2002	Direct – No cost
Santa Paula Boys & Girls Club, Santa Paula	Provided 100 postage-paid self-mailer applications	Feb. 27, 2002	Direct – No cost
Winegard Energy, Duarte	Provided 7,200 postage-paid self-mailer applications	Feb. 20, 2002	Direct – No cost
Episcopal Services Alliance, Anaheim	Provided 50 postage-paid self-mailer applications.	Feb. 6, 2002	Direct – No cost
Winegard Energy, Duarte	Provided 2,400 postage-paid self-mailer applications	Feb. 6, 2002	Direct – No cost

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CARE Initiative	Summary	Timeline	Status/Results/Cost
Veteran's Community Service, Whittier	Provided 200 postage-paid self-mailer applications	Feb. 6, 2002	Direct – No cost
Winegard Energy, Duarte	Provided 2,400 postage-paid self-mailer applications	Feb. 4, 2002	Direct – No cost
Mexican American Foundation, Commerce	Provided 500 postage-paid self-mailer applications	Feb. 4, 2002	Direct – No cost
110 Agencies, Los Angeles City	Provided numerous postage-paid self-mailer applications to the different agencies in our service territory during the Gas Assistance Fund training program.	During January	Direct – No cost
The Salvation Army, Los Angeles	Provided 200 postage-paid self-mailer applications	Jan. 30, 2002	Direct – No cost
Operation Provider, Twin Peaks	Provided 200 postage-paid self-mailer applications, 200 Customer Assistance Program (CAP) brochures in English, and 100 CAP brochures in Spanish	Jan. 30, 2002	Direct – No cost
United American Indian Involvement, Los Angeles	Provided 100 postage-paid self-mailer applications	Jan. 22, 2002	Direct – No cost
Orange County Community Development Council, Santa Ana	Provided 200 postage-paid self-mailer applications	Jan. 16, 2002	Direct – No cost
El Concilio Del Condado De Ventura, Oxnard	Provided 100 postage-paid self-mailer applications	Jan. 14, 2002	Direct – No cost
Winegard Energy Inc., Duarte	Provided 14,200 postage-paid self-mailer applications.	Jan. 14, 2002	Direct – No cost
Proteus, Inc., Visalia	Provided 500 postage-paid self-mailer applications.	Jan. 9, 2002	Direct – No cost

ATTACHMENT B

PY2002 SoCalGas CARE Media Outreach

Media Initiative	Summary	Timeline
<i>Senator Richard Alarcon's Staff</i>	SoCalGas Public Affairs manager met with Senator Richard Alarcon's staff and discussed Direct Assistance, CARE and conservation programs with Assemblyman and COS. Provided hand out information in English and Spanish in the meeting.	December 12, 2002
<i>LA City Neighborhood Councils in the San Fernando Valley</i>	SoCalGas Public Affairs manager provided Direct Assistance and CARE applications at holiday event.	December 9, 2002
<i>Adopt-A-School Meeting</i>	SoCalGas Public Affairs explained SoCalGas customer Assistance programs & CARE application in the meeting.	December 6, 2002
<i>Assemblymember Lloyd Levine</i>	SoCalGas Public Affairs manager discussed Direct Assistance, CARE and conservation programs with Assemblyman and COS. Provided hand out information in English and Spanish (25 each).	December 5, 2002
<i>La Cumbre Middle School</i>	SoCalGas Public Affairs manager met with the school to explain SoCalGas customer Assistance programs & CARE application.	December 3, 2002
<i>St. Vincent's Family Assistance</i>	SoCalGas Public Affairs manager met with the organization to explain SoCalGas customer Assistance programs & CARE application.	December 2, 2002
<i>Joint mailing with SCE and Housing & Community Development Department – County of Orange</i>	SoCalGas partnered with SCE and Housing & Community Development – County of Orange and mailed approximately 1,100 rent assistance recipients the CARE information. The package also included SoCalGas Customer Assistance brochure. Another 8,500 packages are to mail in January 2003.	December, 2002

Media Initiative	Summary	Timeline
<i>Snow Day Event at Hansen Dam, North East San Fernando Valley</i>	Sponsored event and provided Direct Assistance and CARE application in English (200) Spanish (750) and gave out Company bags at Children's Museum booth.	November 23, 2002
<i>Press Conference - Interfaith Energy Assistance Project</i>	SoCalGas and representatives of the California Interfaith Energy Assistance Project (CIEAP) held a press conference at Ontario-Maple Head on November 20, 2002 to inform community about the programs the SoCalGas and SCE offer. The CIEAP, funded by the Hewlett Foundation, is a collaboration between faith groups, community organizations and utility companies. The project promotes programs like the CARE and educates recipients about how to save energy. Customer Assistance brochures, CARE Applications and Medical Baseline Flyers were available for those in attendance. SoCalGas and SoCalEdison were both quoted in the Los Angeles Times Inland Empire Edition regarding their accomplishments in the programs we offer.	November 20, 2002
<i>San Fernando Valley Interfaith Council</i>	SoCalGas Public Affair manager met with Executive Director and outreach workers to provide additional information on Direct Assistance program and CARE applications. Provided handout materials in English (1000), Spanish (1000) and Chinese (200) to be distributed to congregations, Senior Centers, food pantries, meals-on-wheels and homebound programs.	November 20, 2002

Media Initiative	Summary	Timeline
<i>ONE (Organization to Meet the Needs of the Elderly)</i>	SoCalGas Public Affair manager met with key staff to discuss program and provided Direct Assistance program and CARE applications in English (1000) Spanish (750) Chinese (300). Information will be distributed via senior programs, food pantries, meals-on-wheels and homebound program.	November 19, 2002
<i>Banning Manor Senior Center</i>	Presented Customer Assistance Programs to 71 senior citizens at their monthly meeting. Also, distributed Customer Assistance Brochure, Medical Baseline Flyers, and CARE applications.	November 18, 2002
<i>Pacific Coast Business Times</i>	SoCalGas Public Affair manager met with Pacific Coast Business Time staff to explain SoCalGas customer assistance brochure and CARE application.	November 17, 2002
<i>Association of Retired Public Employees of Beaumont</i>	Presented the basic energy conservation information, SoCaGas assistance Programs, and energy efficiency rebate programs to 20 to 30 retirees.	November, 2002
<i>School Reaching Families To Develop Resilience</i>	Provided Customer Assistance Brochures, CARE Applications, Medical Baseline flyers, and giveaways to the Placentia Unified School District. This event is to inform non-English speaking parents on the services various organizations and companies provide. Approximately 300 parents show up to this event every year.	November 2, 2002

Media Initiative	Summary	Timeline
<i>Tired Iron Classic Car and Motorcycle Show</i>	Provided Customer Assistance Brochures and CARE Applications for the Sempra Utilities sponsored event. This event, which benefited the Leukemia/Lymphoma Society, was a good venue to promote SoCalGas Customer Assistance Programs.	November 2, 02
<i>L. A. Employment Expo & Disability Resources Fair</i>	SoCalGas participated in the L. A. Employment Expo & Disability Resources Fair held at the Los Angeles Convention Center. The event attracted more than 1,000 people, many of which were disabled looking for job opportunities and programs. Approximately 200 CARE applications and Customer Assistance Programs brochures were distributed.	October 24, 2002
<i>Asian Pacific Policy and Planning Council</i>	SoCalGas presented customer assistance and energy efficient program information to the executive board of the coalition of Asian and Pacific Islander American health, human service, educational, cultural and policy agencies. Distributed Customer Assistance brochures distributed.	October, 2002
<i>East Valley Lion Club – City of Industry</i>	This was a leveraging outreach effort with the SoCalGas Diverse Markets Outreach Program (DMOP). SoCalGas presented customer assistance and energy efficient program information to the 30 members of the club in Chinese. None of them knew about the programs.	October 22, 2002
<i>Monterey Park Lion Club</i>	This was a leveraging outreach effort with the SoCalGas DMOP. SoCalGas presented customer assistance and energy efficient program information to the 12 members of the club. None of them knew about the program	October 22, 2002

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<i>Rosemead Lion Club</i>	This was a leveraging outreach effort with the SoCalGas DMOP. SoCalGas presented customer assistance and energy efficient program information to the 14 members of the club in Chinese	October 21, 2002
<i>City of Los Angeles Employment Expo and Disability Resources Fair</i>	SoCalGas participated in the Third Annual City of Los Angeles Employment Expo and Disability Resources Fair. Customer Assistance and Human Resources distributed Customer Assistance Brochures, CARE applications, DMOP Brochures, and job postings to more than 1,000 in attendance. The Gas Company had a prime location right at the entrance of the showroom. Everyone who attended, The Gas Company booth was the attendees first stop. Also, gained exposure on KMEX Univision Channel 34, LA City Channel 35, 102.3 FM, and a story was featured on Sempra Daily News.	October 24, 2002
<i>Chinatown Service Center</i>	This was a leveraging outreach effort with the SoCalGas DMOP. A presentation was made to 60 audiences on the Rebate program and Customer Assistance program such as CARE. 3,000 brochures were mailed to the members of the China Town Service Center.	October 18, 2002
<i>SFV Interfaith Council</i>	Distributed information regarding customer assistance programs, CARE and SimplePay.	October 15, 2002
<i>Nuestra Comunidad in Inglewood</i>	SoCalGas participated in the Nuestra Comunidad community event in Inglewood sponsored by State Assemblyman Jerome Horton. The customer assistance and energy efficient programs information were distributed to 500 plus attendees of this event.	October 12, 2002

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Media Initiative	Summary	Timeline
<i>LA CARE</i>	SoCalGas presented CARE and DAP programs to approximately 50 members of the LA CARE in Wilmington. This is a monthly meeting given by LA CARE to members in the area. Attendees are able to learn about programs in their community, as well as voice their concerns of the program.	October 11, 2002
<i>Antelope Valley Senior Expo</i>	SoCalGas had a booth at the Antelope Valley Senior Expo and distributed CARE applications and Direct Assistance program. Over 7,000 people participated the event.	October 10, 2002
<i>Tulare EDC</i>	Visited and provided the CARE Application, DAP Program & DSM to the Tulare EDC	October 10, 2002
<i>Bakersfield South Rotary Club</i>	SoCalGas made a presentation to the 50 members of the group and distributed CARE applications and Direct Assistance program brochures.	October 7, 2002
<i>Community Utility Fair</i>	SoCalGas partnered with SCE in a community utility fair held in the West Covina Mall. Invited guest Senator Gloria Romero presented The Gas Company with a "Certificate of Recognition". Over 20 CARE applications were completed onsite and over 125 CARE applications and Customer Assistance brochures were distributed.	October 5, 2002
<i>A Westminster Chamber Event - Table Top Trade Show</i>	SCG participated in a Table Top Trade Show – A Westminster Chamber Event. Over 75 CARE applications and Customer Assistance Programs brochures were distributed.	October 5, 2002

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Media Initiative	Summary	Timeline
<i>Pacoima Beautiful "Family Day in the Park"</i>	SoCalGas was a sponsor of the event. Distributed information on CARE, Gas Assistance Fund, Medical Allowances, DAP, payment programs and low-income energy assistance programs was distribute at the event.. Over 1,000 low-income residents, primarily of Hispanic or African-American descent attended the event.	October 5, 2002
<i>Tired Iron Classic Car and Motorcycle Show</i>	SoCalGas provided Customer Assistance Brochures, CARE Applications and Medical Baseline flyers for the Sempra Utilities sponsored event. This event is to benefit the Leukemia/Lymphona Society.	October 2, 2002
<i>California Council on Consumer Education Conference</i>	SoCalGas served as a luncheon speaker and delivered messages about SoCalGas' programs and assistances to approximately 200-250 LA City and County managers, case workers and educators from over 30 schools. Customer assistance brochures were distributed.	October 1, 2002
<i>East San Fernando Valley Multipurpose Senior Center</i>	Distributed information regarding customer assistance programs, CARE and SimplePay	October 1, 2002
<i>Vietnamese Moon Festival</i> <i>KSCI Harvest Moon Festival</i> <i>Hangasee Festival</i> <i>Asian & Pacific Islanders Festival</i>	SoCalGas booths for these events distributed 5,500 Chinese, 5,750 Vietnamese, 2,500 Korean and 2,500 English CARE application to customers	September 19, 21, 28, 29, 2002

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Media Initiative	Summary	Timeline
<i>‘Utility 101’ outreach event</i>	SoCalGas Media Relations coordinated an interview with a company Public Affairs Manager and a La Opinion reporter to advertise the event held in Oxnard. The event, co-sponsored by SoCalGas and Edison, had information available on the various customer assistance programs for distribution to participants	September 21, 2002
<i>Fiestas Patrias Celebration of Mexican Independence</i>	The event had over 50,000 attendees. SoCalGas booth, with volunteers from various area of the company, provided answers and distributed information packets that included the CARE applications and CAP brochures to over 5,000 customers who visited the booth.	September 15, 2002
<i>Korean-American Seniors Association of Orange County</i>	After SoCalGas meet with the organization, the agreed to send a Korean/English CARE application and CAP brochure to each of their member households	September 13, 2003
<i>Festival of Philippine Arts & Culture</i>	SoCalGas booth provided information on CARE with over 1,000 in attendance over two days. The CARE applications and CAP brochures were provided	September 7/8, 2002
<i>Hispanic Heritage Month</i>	SoCalGas provided a four-week Newspaper ad – La Opinion and radio ad – KCSN-FM to promote CARE program awareness. KRCA TV, Noticias 62 conducted a Spanish language interview with a SoCalGas Customer Assistance employee and provided the Spanish-speaking 800#.	September 2002
<i>Buena Park Senior Center</i>	SoCalGas participated in an outreach event that provided CARE applications to more than 200 in attendance.	August 24, 2002

Media Initiative	Summary	Timeline
<i>Abrazar, Inc. in Westminster</i>	SoCalGas met with the community-based organization which serves the Hispanic community to provide applications and show them how to complete the form. Their staff will provide this information and support to their customer base.	August 16, 2002
<i>Asian-speaking advertising and marketing campaign</i>	SoCalGas provided a four-week promotional campaign targeting Chinese-, Vietnamese-, and Korean-speaking residents in Los Angeles and Orange Counties by using newspaper and radio advertisements, as well as bus-shelters on the CARE program.	August 2002
<i>SoCalGas Diverse Markets Outreach Program (DMOP)</i>	Selected by the Commission to serve as an “energy-efficiency clearinghouse”, the DMOP is leveraging outreach efforts to reach low-income qualified customers.	On-going
<i>LA CARE’s Executive Community Advisory Committee (ECAC)</i>	SoCalGas provided a presentation to the largest public healthcare provider in the nation. It serves over 800 thousand clients in Los Angeles County. The presentation shared information about CARE, the CAP brochure, and Energy Efficiency. Another benefit to this activity was to develop a partnership with LA CARE to promote SoCalGas programs through their extensive community network.	July 10, 2002
<i>Garden Grove Utilities Fair</i>	SoCalGas fair booth, which was displayed in the Target Store #260, provided the public with CAP brochures, CARE applications, and give-aways.	June 29, 2002

Media Initiative	Summary	Timeline
<i>Los Angeles Public Library's Kids Read Summer Festival</i>	As a major sponsor, SoCalGas participated by supplying CAP brochures, CARE applications and give-aways to families of many diverse backgrounds.	June 8, 2002
<i>ABC Unified School District Adult Education Fair</i>	Over 250 students, many are new immigrants and non-English speaking, attended the fair. Students were provided the CAP brochures.	May 31, 2002
<i>Monrovia's Soap Box Classic/Environmental Conservation Fair</i>	SoCalGas participated with a booth that displayed the CARE application, CAP brochures, and give-aways with the *800#. There were over 500 attendees.	May 18, 2002
<i>Second Annual Serena Mother & Daughter Conference</i>	Conference was held to build self-esteem in teenage girls. Over 15 schools participated within the Los Angeles County, with a high percentage of attendees falling within the income guidelines. SoCalGas provided CARE applications and its CAP brochures in 'goodie bags'	May 10, 2002
<i>San Dimas Senior Citizen Center</i>	SoCalGas, along with Edison and Los Angeles County Water District, gave a presentation to the clients. SoCalGas provided information about its customer assistance programs including Medical Baseline, DAP, and CARE Programs.	May 7, 2002
<i>Earth Day Celebration</i>	SoCalGas participated in the collaborative efforts for the Earth Day Celebration, which included sponsorship of a booth, distribution of the CARE self-mailer application, the CAP brochure in multiple languages, and program give-aways. This was distributed to over 4,000 visitors	April 20/21, 2002

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	to the booth.	
Media Initiative	Summary	Timeline
<i>Arroyo Vista Health Fair</i>	SoCalGas participated in the event and distribution of the CARE self-mailer application, the CAP brochure in multiple languages, and program give-aways. This was distributed to approximately 425 customers. Ten customers completed the application at the fair and have been approved for the CARE Program.	April 19/20, 2002
<i>International Culture Exchange Festival</i>	SoCalGas will participate in future festivals. Ethnic groups participating include Japanese, Latino, Chinese, Korean, African and Native American.	2002
<i>Associated Press</i>	Article issued focusing on the progress utilities have made in community outreach and enrollment efforts	March 23, 2002
<i>Santa Paula Times</i>	Article solicited participation for the Gas Assistance Fund also noting that income qualified customers can receive a 20% discounted rate on the bill. The Gas Company phone number was included.	March 20, 2002
<i>National Science Bowl</i>	Partnered with Los Angeles Department of Water and Power during an academic event for about 250-300 students from Los Angeles Unified School District. Literature was available such as the Customer Assistance Program (CAP) brochure, '45 Ways To Save', and self-mailer CARE applications.	March 2002
<i>La Marathon</i>	SoCalGas collaborative sponsorship for the LA Marathon. This effort includes volunteers from the Company providing Marathon assistance and sponsoring a booth for distribution of program materials and	March 2002

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	promotional items.	
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Media Initiative	Summary	Timeline
<i>Energy Assistance. Conservation, and Safety Seminar</i>	Joint seminar promoted by SoCalGas, Los Angeles Department of Water and Power, City of Los Angeles Community Development Department, and the Los Angeles City Fire Department provided assistance and conservation information on energy programs, such as CARE, that benefit or impact low-income families.	Feb 13, 2002
<i>Radio Interview on Gas Assistance Fund</i>	Interview discussing the one-time bill paying assistance program, which also enrolls income-qualified customers for CARE.	Feb 12, 2002
<i>Newspaper Article on Gas Assistance Fund</i>	The <i>Orange County Register</i> carried a story, which in addition to the one-time bill paying assistance program also enrolls income-qualified customers for CARE.	Feb 12, 2002
<i>Newspaper Article on Gas Assistance Fund</i>	The <i>Los Angeles Daily News</i> carried a story, which in addition to the one-time bill paying assistance program also enrolls income-qualified customers for CARE.	Feb 12, 2002

ATTACHMENT C

**Letter Agreement
Contract Agreement
CSD Leveraging Report**

Southern California Gas Company
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May 1, 2003

May 10, 2000

Mr. Timothy Dayonot
Director
State of California
Department of Community Services
and Development
700 North 10th Street, Room 258
Sacramento, California 95814-0338

**RE: Letter Agreement Between the State of California Department of
Community Services and Development and Southern California Gas
Company for Leveraging and Reporting the California Alternate Rates
for Energy Program Discounts and the State of California Low-Income
Home Energy Assistance Program**

This Letter of Agreement is entered into by the State of California Department of Community Services and Development (CSD) and Southern California Gas Company (SoCalGas) for the purpose of ensuring integration and coordination of resources and benefits between CSD's Low-Income Home Energy Assistance Program (LIHEAP), and SoCalGas' California Alternate Rates for Energy (CARE) and Gas Assistance Fund (GAF) Programs. The existence of this Agreement places CSD within compliance of the Department of Health and Human Services' LIHEAP Leveraging Incentive Program requirements and enables California to claim the GAF payment/CARE discount (s) as leveraged resources. These programs all provide a form of energy assistance to low-income customers. It is mutually agreed that both parties will assist in the referral of their customers to the other energy assistance program through written and/or verbal referrals of the program. SoCalGas will include the toll-free telephone numbers for the LIHEAP and SoCalGas' Direct Assistance Program (DAP) on SoCalGas' CARE applications starting June 1, 2000 and on all GAF materials starting January 1, 2001.

The eligibility criteria and income guidelines are specific to each program. LIHEAP income guidelines are set at 60% of the State Median Income; GAF/CARE income guidelines are 150% of the Federal Income Poverty Guidelines.

The levels of assistance for each program vary according to the respective program. The amount of Federal funding; the number of persons in the household; the applicant's geographical location; and the household's income determine LIHEAP assistance levels. The GAF program offers one payment of an applicant's gas bill up to a maximum of \$100.00 per calendar year. The CARE program offers a 15% reduction off the applicant's monthly gas bill and a 60% discount on the Service Establishment Charge, if qualified for CARE within 90 days of starting new gas service.

The LIHEAP program is operated year round and provides one-time assistance, per household, per program year (January through December). Applicants must re-apply annually. The GAF program provides one-time assistance, per household, per 8-week period (February through March), per calendar year.

Applicants must re-apply annually. CARE provides a continuous 15% rate reduction throughout the year with the applicant re-certifying biennially.

These programs are integrated/coordinated through the written/verbal referral of applicants/customers to the opposite program. Program applications will have the name and toll free telephone numbers of the other programs printed on the applications.

A report on the number of households assisted and the total amount of assistance will be provided to the LIHEAP Program annually starting October 1, 2000.

SoCalGas shall make available to the CSD or its representative all appropriate documents, papers and records pertinent to the referral process and leveraged amounts for examination, copied or mechanical reproduction for a period of three years from the date the information is submitted to CSD. Specifically, SoCalGas will provide CSD with data necessary for completion of California's annual Leveraging Application. The data will be requested each October and will cover the preceding October through September timeframe. The information requested includes: 1) the total number of households currently receiving the reduced rate/energy payment; and 2) the total discount/payment received by all participating households.

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AGREED TO:

Tim Dayonot, Director
State of California
Department of Community Services
Company and Development

Donna Jones-Moore
Manager, Mass Markets
Southern California Gas

Dated:_____

Dated:_____

Southern California Gas Company
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STATE OF CALIFORNIA

STANDARD AGREEMENT

STD.2 (REV. 5-91)

RECEIVED
APPROVED BY THE
ATTORNEY GENERAL
NOV 03 2000

CONTRACT NUMBER 00-1104	AM. NO.
TAXPAYER'S FEDERAL EMPLOYER IDENTIFICATION NUMBER 95-1240705	

THIS AGREEMENT, made and entered into this 1st day of July, 2000, in the State of California, by and between State of California, through its duly elected or appointed, qualified and acting **CONTRACTS UNIT**

TITLE OF OFFICER ACTING FOR STATE

Chief Financial Officer

AGENCY

Dept. of Community Services and Development

CONTRACTOR'S NAME

Southern California Gas Company

, hereafter called the State, and

, hereafter called the Contractor.

WITNESSETH: That the Contractor for and in consideration of the covenants, conditions, agreements, and stipulations of the State hereinafter expressed, does hereby agree to furnish to the State services and materials as follows: (Set forth service to be rendered by Contractor, amount to be paid Contractor, time for performance or completion, and attach plans and specifications, if any.)

This Agreement is entered into for the purpose of making direct credit to the accounts of low-income energy customers of the Contractors that are identified by the Department of Community Services and Development (the Department or CSD) as payment recipients under the Department's Low-Income Home Energy Assistance Program (LIHEAP) which includes the Home Energy Assistance Program (HEAP) and Energy Crisis Intervention Program - Fast Track (ECIP-FT).

I. CONSIDERATION

The Contractor is receiving no direct financial consideration for participating in the direct payment system.

II. TERM

The term of This Agreement shall be July 1, 2000 through June 30, 2003.

RECEIVED
CSD

NOV 13 2000

ACCOUNTING

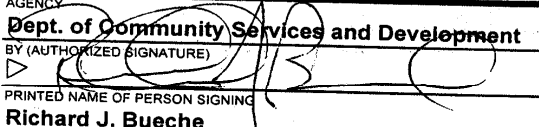
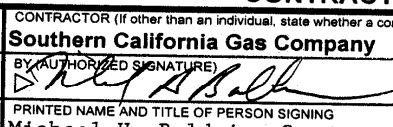
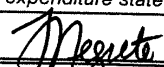
CONTINUED ON SHEETS, EACH BEARING NAME OF CONTRACTOR AND NUMBER.

The provisions on the reverse side hereof constitute a part of this agreement

IN WITNESS WHEREOF, this agreement has been executed by the parties hereto, upon the date first above written.


STATE OF CALIFORNIA

CONTRACTOR

AGENCY Dept. of Community Services and Development		CONTRACTOR (If other than an individual, state whether a corporation, partnership, etc.) Southern California Gas Company	
BY (AUTHORIZED SIGNATURE) 		BY (AUTHORIZED SIGNATURE) 	
PRINTED NAME OF PERSON SIGNING Richard J. Bueche		PRINTED NAME AND TITLE OF PERSON SIGNING Michael H. Baldwin, Customer Remittance Proc. Mgr.	
TITLE Chief Financial Officer		ADDRESS 1801 S. Atlantic Blvd. Monterey Park, CA 91754	
AMOUNT ENCUMBERED BY THIS DOCUMENT \$ 0.00	PROGRAM/CATEGORY (CODE AND TITLE)	FUND TITLE	
PRIOR AMOUNT ENCUMBERED FOR THIS CONTRACT \$ 0.00	(OPTIONAL USE)		
TOTAL AMOUNT ENCUMBERED TO DATE \$ 0.00	ITEM	CHAPTER	STATUTE
	FISCAL YEAR		
	OBJECT OF EXPENDITURE (CODE AND TITLE)		
I hereby certify upon my own personal knowledge that budgeted funds are available for the period and purpose of the expenditure stated above.		T.B.A. NO.	B.R. NO.
SIGNATURE OF ACCOUNTING OFFICER 		DATE 7/20/00	

I hereby certify that all conditions for exemption have been complied with, and this document is exempt from the Department of General Services' approval.



☐ CONTRACTOR ☐ STATE AGENCY ☐ DEPT. OF GEN. SER. ☐ CONTROLLER 

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-----Original Message-----

From: Rudshagen, Carmen Z. - TPCZR
Sent: Friday, October 25, 2002 9:35 AM
To: 'Leveraging, CSD'
Cc: DePratti, Robles Irma; Gomez, Jeanette - TP4JXG; Allen, Michael J.
Subject: RE: Sample Leveraging Format

Attached is The Gas Company information you requested from the utilities. You mentioned that you have the information for San Diego. This is to complete your request on CARE and leveraging data from Sempra Utilities SoCalGas CARE data.

If you have any questions please feel free to call me.

Thanks.

Carmen Rudshagen
San Diego Gas & Electric Company
Southern California Gas Company
Customer Assistance Manager - CARE
323\265-5204 - SC711A
Pager 213\287-2134
crudshagen@semprautilities.com

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SoCalGas CARE Participation Discounts

Month	Gas Discount	Electric Discount	Total Discount	Total Participants
Oct –2001	\$ 2,096,356	\$	\$ 2,096,356	642,210
Nov – 2001	\$ 2,796,562	\$	\$ 2,796,562	649,496
Dec – 2001	\$ 4,661,462	\$	\$ 4,661,462	655,446
Jan – 2002	\$ 4,802,898	\$	\$ 4,802,898	659,558
Feb – 2002	\$ 2,615,248	\$	\$ 2,615,248	666,450
Mar – 2002	\$ 3,481,144	\$	\$ 3,481,144	692,958
Apr – 2002	\$ 3,457,681	\$	\$ 3,457,681	718,541
May – 2002	\$ 3,360,190	\$	\$ 3,360,189	731,963
Jun – 2002	\$ 2,184,291	\$	\$ 2,184,291	743,042,
Jul – 2002	\$ 2,967,319	\$	\$ 2,967,318	751,685
Aug – 2002	\$ 2,058,151	\$	\$ 2,058,150	760,600
Sep 2002	\$ 2,504,559	\$	\$ 2,058,150	775,288
<u>Grand Total</u>	\$36,985,861	\$	\$ 36,985,861	*

*The September 2002 figure is reported as the total number of CARE participants therefore a grand total of participants is not needed.