



***Pacific Gas and Electric Company***



**THIRTEENTH ANNUAL PROGRESS REPORT TO THE  
CALIFORNIA PUBLIC UTILITIES COMMISSION**

**CALIFORNIA ALTERNATE RATES FOR ENERGY  
(CARE)**

**JANUARY 1, 2001 - DECEMBER 31, 2001**

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# CALIFORNIA ALTERNATE RATES FOR ENERGY (CARE)

## CARE Residential Program

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This section describes individual and submetered participants (tenants of qualifying master-meter customers) for the 2001 program reporting period.

### 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.

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

In April and May, the number of participants increased more than 5%, due to extremely high response rates with regards to the bill-insert self-mailing CARE application. This could be attributable to customers seeking relief from the unusually high gas prices at that time.

***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 1<sup>st</sup> periods, were derived.***

For the 2001 program year reporting period, PG&E adopted the Joint Utilities' methodology for calculating demographic CARE-eligibility rates. The particulars of the calculations may be found in attachment A, "Technical Addendum: Joint-Utility Methodology for Calculating CARE Penetration" excerpted from the Joint Utilities' "Reporting Requirements Manual (RRM) Working Group Report for Low Income Assistance Programs" (R.98-07-037)<sup>1</sup>. In summary, PG&E applies county-based commodity-specific demographic eligibility multipliers to the technically eligible meter count within that county. The product of this calculation is then added together to obtain an over-all eligibility for each commodity served.

***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 submetered or other residential meter configurations that do not provide residential service.)***

On a quarterly basis, PG&E obtains a count of technically eligible meters by county and commodity. Within each commodity, there are only certain

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<sup>1</sup> The Joint Utilities are PG&E, Southern California Edison Company, San Diego Gas and Electric Company and Southern California Gas Company. Energy Division and the Office of Ratepayer Advocates also participate in the RRM Working Group.

eligible rate schedules authorized to receive CARE. Customers with both gas and electric commodities who are ineligible for CARE are removed from the pool of technically eligible meters. For each county, the result of this filtering process provides the total technically eligible meter count to which demographic eligibility multipliers may then be applied.

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

PG&E applied the demographically eligible meter count supplied by the Joint Utility demographer to internally derive the technically eligible meter count by county and commodity. To derive the demographic information, the Joint Utilities hired a demographic consultant who culled information starting with the 1990 Census tract data available for the service territory. Updates to the Census information since 1990 were provided in what is called the Public Use Microdata Sample (PUMS) Census Sample of Households, reflecting more up-to-date information on household income. Additionally, commercially available demographic updates were utilized to update the population information for current year.

The Joint Utility demographer then developed matrices, applying appropriate statistical methods in order to properly represent the information by county and fuel type. The raw percentage of estimated eligible population, by county and fuel type, were then provided to PG&E for the combining with our technically eligible meter counts. The product of these statistics results in PG&E's estimated eligible population.

4. *Describe how current CARE customers were counted.*

Each customer placed on CARE is provided a separate CARE discount rate for that commodity. Monthly, PG&E surveys its billing system for all customer accounts, filtering all non-CARE rates from the pool. The results are a listing, by commodity, of all participating CARE accounts with separate meters.

In the case of sub-metered tenants receiving CARE discounts from their master-metered facilities, PG&E maintains a separate database of all participating tenants. Monthly, this database is surveyed and a specific count of all participants is derived.

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

The participation rate by energy source is the total number of participating CARE customers by commodity divided by the estimated technically eligible CARE population by commodity.

- C. Provide the total number of CARE residential customers, CARE-eligible households, and CARE participation rates, by energy source, by quarter. See Tables 2 through 2.4. Gas or electric (single-commodity) utilities will use the format shown in Table 2. Gas and electric (dual-commodity) utilities may use Tables 2.1 through 2.4 in lieu of Table 2.***

See Table 2.

During this reporting period, information was not collected by separate commodity. PG&E began separately tracking customers by commodity early in 2002, therefore, the information displayed here reflects total households only.

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

Electric-only estimated eligible: 288,365

Gas-only estimated eligible: 173,121

Combined electric/gas estimated eligible: 618,452

Total CARE eligibility: 1,079,938 (all based on 175% of Federal Poverty Guidelines)

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

Applying current eligibility estimates for the general population (22.56%), 18,704 electric-only, 14,331 gas-only, and 4,873 combined electric/gas submetered tenants are eligible for CARE.

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

8,835 electric-only, 8,558 gas-only, and 3,292 combined electric/gas submetered tenants were receiving a CARE discount by year-end.

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

47% of the CARE-eligible electric-only tenants, 60% of the CARE-eligible gas-only tenants, and 68% of the CARE-eligible combined electric/gas tenants were signed up for as of year-end. This represents an overall 56% penetration rate.

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

During the 2001 program year, PG&E continued its year-round re-certification schedule for sub-metered tenants. A number of problematic issues are occurring, requiring an extensive amount of time to work through individual issues for each facility. These are described below.

**Management Turnover:** Due to substantial turnover of facility managers, managers are not familiarizing themselves with their facilities complex meter layout. A result is a manager's tendency to apply the discount to only one of several meters, resulting in billing errors for PG&E. The CARE discount is being applied to the wrong master meter.

**Tenant Bill Print information:** Another problem that continued in 2001 was incomplete billing information. The submetered facilities may not display the discounted amount on the individual customer's bill, making it difficult for the tenant to verify that they are receiving their CARE discount. In these instances, PG&E advises the tenants of the current CARE rate and refer them to their manager for further discussion of their billing issues.

**Refused Discount:** The number of problems surrounding the refusal of a facility to pass on the CARE discount to the tenant also continued in 2001. PG&E found that in most cases when the manager received the certification report of qualified tenants, the CARE discount was passed through to the tenant. However, when a manager refused to pass through the discount and the tenant notified PG&E, PG&E advised the tenant of their rights under the California Public Utility Code.

## II. USAGE AND BILL INFORMATION

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

See Table 3.

- 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.

## III. PROGRAM COSTS

### ***A. Discount Cost***

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

	<u>Electric</u>	<u>Gas</u>
Rate Discount	\$9.83	\$6.63
Avoided Surcharges	\$8.52	
Total	\$18.35	\$6.63

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

	<u>Electric</u>	<u>Gas</u>
Rate Discount	\$44,018,000	\$26,005,000
Avoided Surcharges	\$37,344,000	
Total	\$81,363,000	\$26,005,000

## **B. Administrative Cost**

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

See Table 5a, Standardized CARE Administrative Cost Reporting Categories.

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

### **Outreach:**

This category includes Bill Inserts, Advertising, Applications (printing and mailing), Posters, Brochures, Flyers, Postage, Sub-Meter Outreach, Information Technology technical support and software licensing), Call Center Labor, Staff Labor, Out Bounding Dialing, 800 number, and Outreach Pilot. SBX1 5 funded items falling under this category include Capitation Fees, Other Outreach and Mass Media Outreach.

### **Regulatory Compliance:**

This category includes Program Applications, Advice Filings, Comments and Reply Comments, Hearings, Reports and Studies, Working Group Meetings, Public Input Meetings, and Tariff Revisions.

### **Processing, Certification and Verification:**

Costs associated with this category include Staff Labor, Information Technology (technical support and software licensing), Application Processing, Training, Programming Labor, and Sub-Meter Certification. Additionally, SBX1 5 costs included under this category included SBX1 5 Processing/Certification/Verification.

### **Billing System / Programming:**

Manual Rebilling, and Programming and Billing Labor.

### **General Administration:**

Office Supplies, Market Research, Program Management Labor, and Information Technology (technical support and software licensing).

Measurement & Evaluation:

Needs Assessment Study, and Customer Satisfaction Survey.

LIAB Funding:

Both past and present funding as invoices are received.

Energy Division Staff Funding:

Both past and present funding as invoices are received.

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

Gas: \$19,860,000.

Electric: \$13,120,000 (Pre-1998 shortfall plus interest)

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

For the 2001 program year, the following item was recovered with CARE balancing account treatment: CARE Discounts.

During the 2001 program year, the following items were recovered in base rates:

Outreach, Regulatory Compliance, Processing, Certification and Verification, Billing System / Programming, General Administration, Measurement and Evaluation, LIAB Funding, and Energy Division Staff Funding.

SBX1 5 associated costs (Capitation Fees, Mass Media Advertising, Outreach, Processing/Certification/Verification and Other Administration) were separately recoverable through the contractual agreement with the CPUC for SBX1 5 CARE Rapid Deployment, and were reported separately for tracking purposes.

***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 Tables 6a and 6b.



## IV. OUTREACH

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

By and large, the greatest improvement in outreach activities came about as a direct result of additional funds granted PG&E under SBX1 5 in the last half of 2001. While a great boost to the limited rates-funded budget previously allowed by the CPUC, it was still necessary for PG&E to closely manage the funds in order to maximize SBX15 resources. PG&E first more clearly defined its CARE eligible households so that it could develop a targeted outreach and education plan. PG&E learned that CARE eligible customers fall into the following demographic groups:

1. Ninety-seven percent of all eligible customers speak one of five languages at home: English, Spanish, Cantonese, Mandarin or Vietnamese. Forty-three percent are Spanish-dominant.
2. CARE eligible households are predominantly ethnic minorities. These include a mix of seniors, rural residents, agricultural farm workers and residents of sub-metered tenant facilities.
3. While the male head of household is often the customer of record, the female head of household usually makes energy and spending decisions and takes action on important issues.

Because of the tremendous geographic and ethnic diversity of the target community, PG&E realized its CARE enrollment would be greatly enhanced by launching an integrated communications effort. PG&E, through its SBX15 subcontractors, implemented a three-pronged effort for the 2001 CARE Outreach and Education Campaign:

1. a public relations program that includes educational materials, enrollment events and local media outreach;
2. a capitation-fee program to support the participation of grassroots organizations as Community Outreach Contractors (COCs); and
3. a program of grassroots paid media placements targeting low- and fixed-income households.

### **2001 SBX1 5 Campaign Activity Highlights**

- **Multilingual Toll-Free Line:** Fear is a primary barrier to enrollment among many eligible diverse families possibly resulting from state-instituted anti-immigration laws in the 1990s. As a result, PG&E needed a single, non-threatening communication and education tool that could effectively reach these broad audiences and at the same time provide measurement of the campaign's effectiveness. A multilingual toll-free line featuring culturally appropriate, recorded information about CARE achieved both of these goals.

The toll-free line (1-866-PGE-CARE) was the centerpiece of the campaign, providing customers with detailed, clear and pre-recorded information in five languages 24 hours a day, seven days a week. Key message points were developed for the overall service, scripts were tailored for each of the five language groups targeted, appropriate vocal talent was cast, a vendor was secured and all technical preparations were made prior to launch of the toll-free line.

- **CARE Community Outreach Network:** For some customers, in-language, culturally appropriate, in-person support and assistance is critical to getting them to enroll in CARE. This is particularly true with the hardest to reach customers like seniors and homebound individuals. To best service this community, PG&E developed a new CARE community outreach network comprised of more than 90 ethnically diverse, locally based community organizations.
- **CARE Launch Event:** A CARE outreach campaign was launched with a major kick-off event in Oakland to generate a burst of public awareness through media coverage.
- **Grassroots Advertising:** Advertising included Asian-language print, Spanish-language radio and English-language outdoor billboards. Special ads also supported major enrollment events.
- **Community Enrollment Events:** PG&E hosted numerous small and large enrollment events, securing partnerships with local businesses that serve the target population such as Sears, Kmart stores and Soul Beat Television. PG&E produced enrollment events in Hayward, Newark, Oakland, Richmond, Salinas, San Bruno, San Jose, San Raphael, Santa Rosa.
- **Multilingual Educational Materials:** More than one million multilingual brochures, fliers and displays were distributed to laundromats, churches, community centers, school districts, foreign consulates and PG&E pay stations.
- **Media Partnerships:** Strategic partnerships were developed with key ethnic media outlets, including Spanish-language radio and television stations, and a radio station broadcasting on a Native American reservation.
- **Community Leaders Outreach:** Third-party endorsements are essential to gaining trust and support for PG&E among ethnic communities, particularly low-income customers. As a result, PG&E worked to gain the valuable support and participation of influential community leaders across the territory. Extra effort was given to leaders in the Asian Pacific American, African American, Native American and Latino communities.
- **Outbound Call Center:** To enhance recertification efforts among its customers, PG&E began an outbound call center to contact nearly 40,000 CARE qualified households scheduled to re-certify their eligibility in the program.
- **Targeted Media Relations:** Because enrollment rates and enrollment barriers differ from market to market and culture to culture, PG&E pitched ethnic and general market television, print and radio media with localized

CARE media kits. These kits included market-specific enrollment data; a list of upcoming CARE area enrollment events; a list of CARE community outreach partners; and Spanish- and English-language broadcast-ready videotapes featuring interviews and footage on CARE. PG&E also linked the media outlets with customers that successfully enrolled in CARE to tell their stories.

Other efforts begun in 2001, but not funded through SBX1 5 activities included a revised in-the-bill application, developed in partnership with Greenlining Institute through a memorandum of understanding and utilized in March and May billing cycles. For 2002, this design has been improved upon to include postage paid return mailing and will be used for all CARE notifications.

PG&E also took advantage of further development of the utility web site in 2001. As new applications became available, each was posted, in language-specific areas, in formats that allowed for easy download and printing. A Frequently Asked Question section accompanied each program area and links to other assistance programs were provided. Feedback from users of the web site as well as outreach partners continues to allow for improvement of the site in 2002.

Attachments B and C detail PG&E's outreach and media activities during 2001.

***B. Discuss each of the following:***

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

PG&E believes that no single medium represents the best approach to delivery of the CARE program to our customers. It has been demonstrated throughout the SBX1 5 campaign that a carefully crafted combination of media, collateral and community support is what is needed to reinforce the message of assistance through the CARE program to our customers.

The single biggest measurement of the outreach campaign's success is the improvement in PG&E's CARE penetration rate. After starting the year with a 34 percent penetration rate, PG&E surpassed 52 percent by December 2001. In total, the company enrolled and re-enrolled 415,722 customers during the year. As illustrated by the monthly enrollment totals, CARE applications hit an all-time high in the final three months as the integrated CARE campaign took hold.

While individual campaign elements had varying degrees of impact on call volume with the toll-free line, no single activity can easily be measured as the most effective tool for enrolling customers. The campaign was successful because the various campaign elements were integrated and

complimentary. In addition to overall improvement in enrollment, PG&E noted other measurements of success:

- PG&E assembled more than 90 community-based organizations to support CARE outreach. Dozens participated in community events and together they submitted more than 14,000 applications in 2001.
- The toll-free line proved to be a valuable education tool handling more than 75,000 total calls in all five languages since its launch in August.
- The CARE story was accurately reported in six languages in nearly every market within PG&E's service territory.
- Two dozen elected officials endorsed the campaign and "CARE Day" was officially proclaimed by officials in four cities. Additionally, eight CARE partners testified before the CPUC in February and acknowledged PG&E for delivering a dynamic, effective and culturally appropriate CARE campaign.

During the 2001 Program Year, the most cost-effective method of outreach was the bill-insert self-mailing CARE application, sent to over 4 million residential customers who were not taking currently participating in CARE. In March 2001, as the result of a memorandum of understanding with Greenlining Institute focused on providing relief to those customers most impacted by the unusually high gas prices in the winter of 2000, PG&E inserted its first full application in the bill. A second insert, adapted to assist in promoting CARE after the change in benefits to 20%, was completed in June 2001. Between the two bill inserts, PG&E received over 70,000 applications, resulting in more than 60,000 new enrollees.

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

**Language:** With the increasingly diverse population of California, and the wide geographic distribution of the customers within PG&E's territory, it is no surprise that language has been a barrier to enrolling customers for the CARE program over the years. In 2001, PG&E took a major step towards easing this barrier by expanding the services provided our main language customers on our own CARE toll-free phone line. For example, instead of providing an English only menu for our customers when contacting PG&E's CARE program, the new 866-PGE-CARE line has informational menus to address the most frequently asked questions in English, Spanish, Mandarin, Cantonese and Vietnamese.

Additionally, these menus direct customers seeking assistance in completing their applications to community based organizations in their area that specialize in in-language assistance. This opportunity came about as PG&E began to incorporate the unique talents of the various CBOs recruited through the SBX1

5 rapid deployment project. Participating organizations provided the zip codes served and in what languages they provided services, all used to link our customers' needs to their assistance.

**Geography:** Another barrier to enrollment is the extent to which customers are scattered throughout the PG&E service territory. Although it is apparent from our county by county breakdown where the greatest population centers are located within the territory, it is the miles between these centers that causes the most problem in reaching the customers. For example, the CBOs recruited through the SBX1 5 rapid deployment project, for the most part, were located within our major metropolitan areas. Although this allows for PG&E to reach the greatest number of customers in that area, it doesn't address the issue of reaching the more rural customers as well as those remote to a PG&E local office location. PG&E has made a concerted effort to find and retain rural based organizations that will be able to reach these less populated locations as well as travel to visit the hard-to-reach groups.

**Culture:** Language barriers may link to cultural barriers, but they are not one and the same. PG&E has found that addressing language doesn't necessarily break through cultural issues that prevent customers from seeking assistance from PG&E. Towards that end, PG&E contracted with a number of consultants, collectively referred to as the Ethnic Media Partners, who worked to address the issues of ethnicity in our advertising and assistance throughout our communities. Special collateral materials were developed, not just in language, but also taking into consideration design and form to reach the broadest number of customers within specific markets. Additionally, media was developed, taking ethnicity in mind and delivery of the advertising varied dependent upon the target audience. The response from these various approaches have demonstrated the success of the program, a continuation of which is sought through approval of additional funding in this area for 2002.

**Application Design:** PG&E adapted a number of suggestions from public workshops as well as feedback from customers in further adapting changes to the CARE applications for 2001. Additional changes are still needed and will be incorporated in the future with an eye towards ease of completion by the customer as well as speed and accuracy of processing on PG&E's part. Several variations on the applications were used throughout the SBX1 5 campaign in 2001 that allowed for specific cultural and language issues to be addressed. For example, Spanish language applications were used on the back half of a colorful flyer and distributed in a widely read weekly periodical through the central valley. Language used in the applications was culled to provide bullet point information and reduce the "clutter" an applicant might experience in completing the form.

**Budget:** PG&E had previously been restrained by the inability to receive balancing account treatment for administrative costs associated with CARE. This restriction left a maintenance budget of slightly more than \$1,000,000 for

all administrative costs associated with CARE from 1998 through 2001. During this time, costs for marketing CARE increased dramatically. For example, a multi-lingual radio campaign designed in 1990 and targeting the metropolitan areas of Fresno and Bakersfield was successful in reaching the Spanish and Asian language markets for less than \$1,000,000. The same campaign, priced in today's markets would cost almost \$4,000,000. Only after the passing of SBX1 5 and SBX2 2 that funding relieve came, allowing PG&E to pursue activities that benefited the customers and provided reimbursement for CBOs long interested in assisting PG&E in enrollment efforts. PG&E took advantage of these available funds to develop our multi-pronged outreach campaign that has dramatically increased awareness of the CARE program throughout our territory.

**Trust:** Customer issues such as mistrust and self-elimination are also barriers that are more difficult to surpass when attempting to reach further into the previously non-participating but eligible population. Although the reasons often tie to cultural differences, PG&E has come a long ways towards understanding these differences and bridging the gaps so that customers can feel comfortable with their decision to participate in the discount program. The various Community Outreach Contractors (COCs) that have partnered with PG&E through the SBX1 5 rapid deployment process are to thank most of all. These various organizations, often working in particular communities previously unreachable by PG&E, have been instrumental in breaking down barriers and enrolling customers.

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

Pacific Gas and Electric Company borders two utilities in a small geographic location of the service territory. As a result, there is no formal agreement for electronic data exchange of the type developed between Southern California Edison and Southern California Gas companies.

In certain areas, customers may receive one commodity from PG&E, and another from an adjacent utility. When an eligible customer application from such a customer is received, PG&E will certify the customer and then mail a copy of the application is directly to the processing center for that bordering utility.

***E. 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.***

Once quarterly, the entire database of participating CARE customer contact information is uploaded for distribution to the LIEE providers in use for their outreach.

Since the CARE discount is noted directly into the Customer Information System, customer service representatives have knowledge of the CARE status of a customer should one phone our call center for assistance. This knowledge comes in handy for handling these calls, and provides clues used when discussing other benefits and services that may be of assistance to the low-income customer.

A secondary source of leveraging occurs through the inclusion of contact information in our application mailings to customers inquiring about CARE. On each application that is delivered to a customer, Pacific Gas and Electric Company has provided a brief description of the assistance available through and contact number for the HEAP program.

Also, as part of our Customer Service Call Center scripting, Service Representatives are instructed to provide information on the HEAP program should a customer contact Pacific Gas and Electric Company regarding any other payment assistance program (including CARE, REACH, Balance Payment Plan, Medical Baseline and Life Support and Energy Partners). Likewise, the CARE Processing Center also provides referral information to customers who may be identified as being in need for additional assistance.

***F. 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. (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.)***

There currently is no formal written agreement for exchange of leveraging information between Pacific Gas and Electric Company and CSD. However, Pacific Gas and Electric Company has provided assistance in leveraging federal funding through the Home Energy Assistance Program (HEAP) on an annual basis since 1989. The primary information provided to CSD is a monthly breakdown of the total number of participants (residential and sub-metered tenant count) along with the total dollar amount of discount provided that portion of the population during that period.

***G. 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.***

Drop-off from recertification continues to present the greatest challenge to increasing overall participation. As enrollment continues to rise, so do the numbers of CARE customers subject to recertification, creating a situation where it will take greater and greater numbers of enrollments simply to maintain current penetration rates. Presently, it takes the CARE processing team the same amount of time and effort to enroll a customer, regardless of whether the customer is a new enrollee, or simply recertifying eligibility.

To address this issue, PG&E has designed and plans to implement a new recertification form in 2002. This form will make it easier for customers to understand and respond to recertification material. In addition, it will ease the processing burden currently placed on the CARE processing team.

Additionally, to minimize duplicate applications, and reduce repeat phone contact, PG&E is exploring the cost of introducing a multilingual "Welcome to CARE" postcard that will be sent to every new, qualified household. The postcard will tell customers they have been approved for CARE, where to look for the discount on their bill and inform them of the need to re-certify their CARE status in two years.

### **Community Partner Training**

As community partners generate thousands of applications a year, PG&E also is expanding its training procedures for its CARE community outreach contractor (COC) network.

1. Currently, staff members from all newly approved CARE COCs are required to participate in a CARE enrollment training session. As staff turnover is a major challenge among many of the non-profits participating in the program, PG&E is now offering COCs quarterly training session to provide new staff members the opportunity to learn the intricacies of CARE enrollment.
2. PG&E also sends monthly tips on successful CARE enrollment practices through its email distribution list.
3. Finally, to build a sense of community among CARE contractors and to ensure greater continuity of the program goals and objectives, PG&E is producing a CARE Community Partner Manual to make the enrollment process more effective and efficient for the COCs. The manual will include a PG&E CARE Team contact list, monthly reporting forms and procedures, tips on enrolling customers in CARE, a list of CARE network partners, a list of CARE collateral, details on the toll-free line, 2002 CARE enrollment



statistics, CARE contractors Frequently Asked Questions, CARE application order form and procedures, a CARE fact sheet, sample sub-metered and residential applications in all available languages, a map of PG&E's service territory and more.

## 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/ incomplete, or duplicates in the reporting period.*

See Table 7.

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.

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

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

Pacific Gas and Electric Company requested re-certification based upon the original certification date for the tenant within each facility. Each month, tenants certified one year previously are mailed a new application and a request for re-certification of their eligibility for CARE.

The tenants are provided 90 days to complete their application and return it to Pacific Gas and Electric Company. Tenants failing to return the application within 90 days, or notifying Pacific Gas and Electric Company of ineligibility are removed from the sub-meter CARE listing for the facility at that time, and a revised listing is mailed to the manager / landlord alerting them of the change in the tenant's eligibility.

### ***B. Processing Random Post-Enrollment Verification Applications***

1. *Provide a table showing the number of customers removed from CARE by month due to the verification process. (NOTE: Customer 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.

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

See Table 10.

- 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.*

Pacific Gas and Electric Company had no third party contracts perform these duties in 2001. All these functions were performed by the CARE Processing Center within Pacific Gas and Electric Company.

## VI. PROGRAM MANAGEMENT

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

Several issues presented challenges in one form or another for PG&E during 2001.

**Energy Crisis:** The first such challenge was the energy crisis of winter 2000. Faced with the highest natural gas prices that customers had ever experienced, interest in assistance programs peaked in early 2001, generating more applications processed in a single month than at anytime during the previous eleven years of the program. This volume placed a significant strain on resources and staffing as the CARE Processing Team struggled to meet regulatory requirements and customer expectations of speedy relief. It was necessary to increase staffing, even without assurances of cost recovery. The CARE Processing Staff increased from 17 full time employees to over 24 employees by the end of 2001.

**Cost Recovery:** Cost recovery for the efforts undertaken in 2001 continue to hinder PG&E's ability to make plans for outreach efforts. Without recovery mechanisms, the utility was reluctant to extend the resources regarded necessary to make the most impact. Despite repeated requests for the CPUC to grant PG&E balancing account treatment for administrative costs in a manner consistent with other utility practices, PG&E was not allowed to implement this mechanism until the passing of SBX2 2. This still presents problems with cost

recovery for efforts made in good faith during the 2001 program year. Regardless of the problems presented here, PG&E is proud of its accomplishments in outreach and enrollment for 2001, and expects to build on this effort in 2002.

**Program Changes:** The pace at which changes occurred to the CARE Program through both legislative mandate and CPUC decision in 2001 created a number of problems for administration of the program. For example, a change in the discount from 15% to 20% took place at a separate time than did the income requirements changing from 150% to 175% of Federal Poverty Guidelines. And the annual change required to account for cost of living changes to the income guidelines were put into place on schedule, but a final decision regarding PG&E's standardized forms could not be reached. The result of these changes forced PG&E to re-print forms four separate times during the 2001 program year. Each time, old forms had to be dumped and replaced with new, a waste of resources for the utilities.

Other initiatives designed to take advantage of technology such as scanning and digital coding of the applications were necessarily sidelined since no final direction was received during this time. It is PG&E's hope that some of these administrative issues will be re-prioritized for appropriate review and consideration during 2002.

**SBX1 5 Contract Problems:** PG&E continues to work through problems surrounding reimbursement of expenses as a direct result of rapid deployment implementation. Interpretation of the contract language that appears to be in conflict with decision language has exposed PG&E to a significant amount of expense that may not be reimbursed. Delays in decisions regarding these issues postpone the depletion of the contracted funds as well as cast doubts on plans and budgets for 2002. PG&E has plans to deplete the SBX1 5 funds before June 2002 and move forward with normal funding processes as soon as possible.

## CARE Expansion Program

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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

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

See Table 11.

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

36,346 tenants resided within facilities receiving the CARE discount by December 31, 2001. This information is not available by energy source. The resulting numbers were representative of the total number of residents housed in all facilities, both residential and commercial, and for both energy commodities.

### II. USAGE INFORMATION

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

See Table 12.

### III. PROGRAM COSTS

#### *A. Administrative Cost*

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

See Table 5b, CARE Expansion Administrative Cost Reporting Categories.

#### *B. Discount Information*

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

Electric: \$144              Gas: \$237

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

Electric: \$1,253      Gas: \$1,007

#### IV. OUTREACH

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

During the reporting period, Pacific Gas and Electric Company worked with local organizations as well as external relations to further advertise the programs to non-profits and agricultural employee housing facilities.

Bill Inserts for CARE were included for all rate schedules, including Industrial and Commercial customers, with the intent of alerting possible CARE eligible customers of the expanded programs.

Additionally, working dialogs were established with several umbrella organizations representing facilities that might qualify for non-profit discounts. Joint utility efforts educated these organizations and leads for possible enrollments were received for our efforts.

In late 2001, the CPUC provided a master list of low-income housing facilities receiving State compensation for energy costs. PG&E utilized this statewide list to mail over 1,000 information and enrollment packages to possible non-profit facilities. Although the enrollment from this effort was negligible, PG&E did receive a number of inquiries concerning how to assist enrolling their individually metered customers for CARE. Most of the facility contacts requested additional packages of Single Family CARE Applications while a couple asked for additional information and enrollment packages to share with their counterpart facilities not originally on the CPUC supplied listing.

PG&E also took advantage of further development of the utility web site in 2001. As new applications became available, each was posted, in language-specific areas, in formats that allowed for easy download and printing. A Frequently Asked Question section accompanied each program area and links to other assistance programs were provided. Feedback from users of the web site as well as outreach partners continues to allow for improvement of the site in 2002.

***B. Discuss each of the following:***

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

Word of mouth continues to be the most effective outreach method available for the expanded programs. Of the leads that were successful, all had heard

of the program through another current participant, and had inquired as to the possibility for their own eligibility. Moreover, consistent communication between the non-profit organizations and PG&E helped ensure timely certification of eligible facilities.

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

Pacific Gas and Electric Company borders two utilities in a small geographic location of the service territory. There is no formal agreement for electronic data exchange of the type developed between Southern California Edison and Southern California Gas companies.

In certain areas, customers may receive one commodity from PG&E, and another from an adjacent utility. When an eligible customer application from such a customer is received, PG&E will certify the customer and then mail a copy of the application directly to the processing center for that bordering utility.

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

There continues to be confusion over the eligibility criteria for the expanded programs. Often times, customers do not understand the definitions of "Group Living Facility" or "Agricultural Employee Housing". For example, the CARE Program received a number of non-profit applications during 2001 that were actually for single-family customers. Because more than one family was living on the premises, and therefore on the same PG&E account, the customer believed they should apply for the group-living facility program. In each of these cases, the misconception was explained and the customer enrolled in the correct program.

Also, there continues to be delays in supplying supplementary documentation needed to support the application process. To manage the situation, various means of communication and follow up with the client kept many of the organizations properly informed about eligibility and eventual certification.

For the Agricultural Housing program, there has also been a misleading belief that, if a customer was an actual farm-worker, they should enroll in this particular expanded program. Again, the customers were informed that they were eligible for the residential programs and correctly enrolled at that time.

- 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.***

Although word of mouth and bill inserts continue to be effective methods of outreach for the expanded programs, more can be done to attract new eligible non-profit organizations. In 2002, PG&E plans to create a targeted outreach program for our non-profit homeless shelters, group living facilities, and hospices.

In addition, the CARE Expansion program will be partnering with PG&E's agricultural account representatives in order to increase awareness and enrollment in the agricultural program.

## **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.***

See Table 13a.

- 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 13b.

- 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.***

Pacific Gas and Electric Company had no third party contracts to perform these duties in 2001. All these functions were performed by the CARE Processing Center within Pacific Gas and Electric Company.

## VI. PROGRAM MANAGEMENT

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

The greatest challenge in 2001 was directly related to the energy crisis. The number of non-profit applications processed in 2001 doubled the previous total of the entire program existence.



<b>TABLE 1</b>		
<b>RESIDENTIAL CARE PROGRAM</b>		
<b>Customers by Month<sup>1</sup></b>		
<b>2001</b>	<b>CARE Customers</b>	<b>Percentage Change</b>
Jan	362,599	3.42%
Feb	379,352	4.42%
Mar	398,213	4.74%
Apr	426,104	6.55%
May	449,532	5.21%
Jun	462,014	2.70%
Jul	472,204	2.16%
Aug	481,158	1.86%
Sep	491,673	2.14%
Oct	505,947	2.82%
Nov	528,395	4.25%
Dec	545,175	3.08%

1 Total individual and submetered.

<b>TABLE 2</b>			
<b>CARE Residential Penetration Rate</b>			
<b>Total Customers</b>			
<b>2001</b>	<b>CARE Residential</b>	<b>CARE-Eligible</b>	<b>CARE Penetration</b>
<b>Quarter Ending</b>	<b>Customers</b>	<b>Customers</b>	<b>Rate</b>
31-Mar	398,213	1,204,646	33%
30-Jun	462,014	1,204,646	38%
31-Oct	505,947	1,045,252	48%
31-Dec	545,175	1,079,938	50%

<b>TABLE 3</b>			
<b>AVERAGE MONTHLY GAS / ELECTRIC USAGE</b>			
<b>Residential Non-CARE vs. CARE Customers<sup>1</sup></b>			
<b>Customer</b>	<b>Gas Therms Tier 1</b>	<b>Gas Therms Tier 2</b>	<b>Total</b>
Non-CARE	28.3	12.4	40.7
CARE	26.3	8.2	34.5
<b>Customer</b>	<b>Electric KWh Tier 1</b>	<b>Electric KWh Tier 2</b>	<b>Total</b>
Non-CARE	309	209	528
CARE	322	134	456

1 Excludes master-meter usage.

<b>TABLE 4</b>		
<b>AVERAGE MONTHLY GAS / ELECTRIC BILL</b>		
<b>Residential Non-CARE vs. CARE Customers<sup>1</sup></b>		
<b>(Dollars per Customer)</b>		
<b>Customer</b>	<b>Gas</b>	<b>Electric</b>
Non-CARE	\$47.31	\$69.26
CARE	\$33.22	\$40.09

1 Excludes master-meter usage.

Table 5a							
Standardized CARE Administrative Cost Reporting Categories							
2001 Cost in Dollars							
CARE Program	CARE Base Program			SBX1 5			Total
	Electric	Gas	Total	Electric	Gas	Total	
Outreach							
- Capitation Fees	0	0	0	43,898	23,638	67,536	67,536
- Other Outreach	945,368	509,045	1,454,413	827,831	445,755	1,273,586	2,727,999
- Mass Media	0	0	0	294,047	158,333	452,380	452,380
Total Outreach	945,368	509,045	1,454,413	871,729	469,393	1,793,502	3,247,915
Processing/Certification/ Verification	367,725	198,006	565,730	248,542	133,831	382,373	948,103
Billing System /Programming	11,010	5,928	16,938	0	0	0	16,938
CARE Outreach Pilot	129,203	69,571	198,774	0	0	0	198,774
Measurement & Evaluation	1,100	593	1,693	0	0	0	1,693
Regulatory Compliance	44,498	23,960	68,458	0	0	0	68,458
Other Administration	158,821	85,519	244,340	18,550	9,989	28,539	272,879
Indirect Costs (P&B)	n/a	n/a		n/a	n/a		n/a
Oversight Costs							
- LIOB Start-up		0	0	0	0	0	0
- LIOB PY Past Year	0	0	0	0	0	0	0
- LIOB PY Present Year	0	0	0	0	0	0	0
- CPUC Energy Division	42,598	22,937	65,535	0	0	0	65,535
Total Oversight Costs	42,598	22,937	65,535	0	0	0	65,535
TOTAL ADMINISTRATION COSTS	1,700,323	915,558	2,615,881	1,138,822	1,065,592	2,204,414	4,820,295
CARE Rate Discount	44,018,000	26,005,000	70,023,000	0	0	0	70,023,000
Avoided Surcharges	37,344,000	0	37,344,000	0	0	0	37,344,000
Service Establishment Charge Discount	0	0	0	0	0	0	0
TOTAL PROGRAM COSTS (INCL CUSTOMER DISCOUNTS)	83,062,323	26,920,558	109,982,881	1,138,822	1,065,592	2,204,414	112,187,295

<b>Table 5b</b>	
<b>CARE Cost Reporting</b>	
<b>Annual Costs in Dollars</b>	
<b>Category</b>	<b>Expenditure</b>
<b>Outreach</b>	<b>\$11,455</b>
<b>Regulatory Compliance</b>	<b>\$0</b>
<b>Processing/Certification/Verification</b>	<b>\$29,237</b>
<b>Billing System / Programming</b>	<b>\$0</b>
<b>General Administration</b>	<b>\$5,108</b>
<b>Measurement &amp; Evaluation</b>	<b>\$0</b>
<b>LIAB Funding</b>	<b>\$0</b>
<b>Energy Division Staff Funding</b>	<b>\$0</b>
<b>Total Programs Costs</b>	<b>\$45,800</b>

<b>TABLE 6A - ELECTRIC</b>					
<b>CARE SURCHARGE AND REVENUE COLLECTED BY CUSTOMER CLASS</b>					
<b>Customer Class</b>	<b>Average Monthly</b>		<b>CARE Surcharge as Percent of Bill</b>	<b>Total CARE Surcharge Revenue Collected</b>	<b>Percentage of CARE Surcharge Revenue Collected</b>
	<b>CARE Surcharge</b>	<b>Monthly Bill</b>			
Residential*	\$0.34	\$70.95	%0.48	\$15,362,111	33.9%
Commercial	\$3.07	\$674.77	%0.46	\$17,859,827	39.4%
Agricultural	\$2.51	\$533.37	%0.47	\$2,451,284	5.4%
Industrial	\$587.81	\$80,672.27	%0.73	\$9,684,797	21.3%

\* Excludes CARE customers

<b>TABLE 6B - GAS</b>					
<b>CARE SURCHARGE AND REVENUE COLLECTED BY CUSTOMER CLASS</b>					
<b>Customer Class</b>	<b>Average Monthly</b>		<b>CARE Surcharge as Percent of Bill</b>	<b>Total CARE Surcharge Revenue Collected</b>	<b>Percentage of CARE Surcharge Revenue Collected</b>
	<b>CARE Surcharge</b>	<b>Monthly Bill</b>			
Residential	\$0.13	\$52.33	0.25%	\$5,242,850	42.3%
Commercial	\$0.98	\$326.46	0.30%	\$2,412,715	19.4%
Industrial	\$432.03	\$6,967	6.20%	\$4,742,864	38.3%

<b>TABLE 7</b>					
<b>CARE Outreach Pilot</b>					
<b>August 1, 2001 through December 31, 2001</b>					
<b>Entity</b>	<b>CARE Applications Submitted</b>				
	<b>Received</b>	<b>Approved</b>	<b>Denied</b>	<b>Pending/ Incomplete</b>	<b>Duplicates</b>
Hill and Knowlton Call Center Operations*	291	214	17	0	60
Amandela Project	39	18	13	0	8
Asian, Inc.	183	102	29	0	52
Black American Political Assoc of CA	68	46	6	0	16
Black Women Organized for Ed Dev	43	38	1	0	4
Cambodian Community of Stockton	82	73	1	0	8
Chapa-de Indian Health Program, Inc.	2	1	0	0	1
Chinatown Community Development Center	72	39	2	0	31
Chinese Newcomers Service Center	32	26	2	0	4
Community Action Board of Santa Cruz	478	273	35	0	170
Community Resource Project, Inc.	839	646	73	0	120
Ebony Counseling Center	37	29	0	0	8
El Concilio of San Mateo Co.	304	241	19	0	44
Familia Center	83	53	9	0	21
Fresno Center for New Americans	130	117	2	0	11
Korean Center	1	1	0	0	0
Lao Veterans of American Institute	43	40	2	0	1
Lao Family Community of Fresno	19	16	0	0	3
Lao Khmu Association, Inc.	12	10	0	0	2
Madera County Community Action Agency, Inc.	168	147	5	0	16
Law Foundation of Silicon Valley	144	97	12	0	35
Oakland Citizens Committee for Urban Renewal (OCCUR)	549	392	54	0	103
Sacramento Lao Family Community	143	96	6	0	41
Self-Help for the Elderly	63	39	7	0	17
Southeast Asian Community Center	24	12	0	0	12
Spanish Speaking Unity Council	245	191	14	0	40
Suscol Inter Tribal Council	77	55	6	0	16
American Viet League	27	24	0	0	3
Asian Resources	80	48	12	0	20
California Human Development Corporation	449	317	37	0	95
Central Coast Center for Independent Living	68	55	0	0	13
Central Valley Opportunity Center	534	423	47	0	64
Centro La Familia Advocacy Services	334	191	11	0	132
Christ Temple Community Church	56	51	0	0	5
Coalition of Rural Pueblos-Economic Development	99	64	2	0	33
Congress Of California Seniors Education & Research Fund	137	104	11	0	22
Disability Resource Agency for Independent Living	1	1	0	0	0

<b>TABLE 7</b>					
<b>CARE Outreach Pilot</b>					
<b>August 1, 2001 through December 31, 2001</b>					
<b>Entity</b>	<b>CARE Applications Submitted</b>				
	<b>Received</b>	<b>Approved</b>	<b>Denied</b>	<b>Pending/ Incomplete</b>	<b>Duplicates</b>
Economic and Social Opportunities, Inc.*	29	26	3	0	0
Familia Unidas	21	17	1	0	3
Filipino American Chamber of Commerce of Santa Clara County, Inc.	53	37	6	0	10
The Greenlining Institute	2180	1254	410	0	516
Merced Lao Family Community Inc.	45	39	4	0	2
North Peninsula Neighborhood Services	130	103	7	0	20
Plumas County Community Development Commission	52	41	1	0	10
Redwood Community Action Agency	77	66	3	0	8
Volunteer Center Of Sonoma County	47	41	2	0	4
West County Community Services	2	1	0	0	1
Whistlestop*	12	7	0	0	5
Young Community Developers	78	40	8	0	30
Alameda County Community Food Bank	172	108	5	0	59
Bridge Housing Corporation	87	43	8	0	36
Charles P. Foster Foundation	165	118	13	0	34
Foster Grandparent and Senior Companion	28	19	3	0	6
Hmong American Women Associates	49	39	9	0	1
Lao Family Community Development, Inc.	13	9	3	0	1
Yuba Sutter Legal Center	13	11	0	0	2
Black Employees Association*	3	3	0	0	0
LGBT Employees Association*	8	6	1	0	1
Filipino Employees Association*	3	2	0	0	1
Vineyard Worker's Services	22	11	11	0	0
Fresno School District*	6	2	0	0	4
San Francisco School District*	54	33	3	0	18
Salinas School District*	19	9	2	0	8
Center for Training and Careers	447	286	39	0	122
F.O.O.D. Inc	124	62	23	0	39
Humboldt Senior Resource Center	16	7	0	0	9
Elder Abuse Prevention	114	80	14	0	20
Goodwill Industries of Santa Cruz, Monterey and San Luis Obispo Counties	1	1	0	0	0
<b>Total</b>	10026	6811	1014	0	2201
<b>Percentage</b>	100%	68%	10%	0%	22%

\* This Community Outreach Contractor (COC) was not paid for their efforts. Achievements are shown for tracking purposes.

<b>TABLE 8</b>						
<b>CARE Self-Certification and Self-Recertification Applications<sup>1</sup></b>						
	<b>Provided</b>	<b>Received</b>	<b>Approved</b>	<b>Denied</b>	<b>Pending/ Incomplete</b>	<b>Duplicates</b>
<b>Total</b>	595,910	456,094	414,722	5,438	15,761	20,173
<b>Percentage</b>	100%	77%	91%	1%	3%	4%

1. Total individual and submetered.

<b>TABLE 9</b>			
<b>Residential CARE Program Customers<sup>1</sup> Removed by Month through Recertification and Post-Enrollment Verification</b>			
<b>2001</b>	<b>Recertification</b>	<b>Post-Enrollment Verification</b>	<b>Total</b>
January	2,847	189	3,036
February	2,019	130	2,149
March	2,946	163	3,109
April	2,142	159	2,301
May	3,132	123	3,255
June	3,447	132	3,579
July	3,687	141	3,828
August	3,798	146	3,944
September	4,203	89	4,292
October	3,951	97	4,048
November	4,944	156	5,100
December	4,275	184	4,459
<b>Total</b>	<b>41,391</b>	<b>1,709</b>	<b>43,100</b>

1 Total individual and submetered.

<b>TABLE 10</b>						
<b>CARE Random Post-Enrollment Verification Applications</b>						
	<b>Mailed</b>	<b>Received</b>	<b>Approved</b>	<b>Denied</b>	<b>Pending/ Incomplete</b>	<b>Duplicates</b>
<b>Total</b>	5,377	3,748	3,668	80	1,629	37
<b>Percentage</b>	100.00%	69.70%	68.22%	1.49%	30.30%	0.69%

1 Total individual and submetered.

<b>TABLE 11 A</b>			
<b>CARE EXPANSION PROGRAM</b>			
<b>Participating Facilities by Month ( Gas )</b>			
<b>2001</b>	<b>CARE Residential</b>	<b>CARE Commercial</b>	
	<b>Facilities</b>	<b>Facilities</b>	<b>Total</b>
January	681	232	<b>913</b>
February	680	231	<b>911</b>
March	698	235	<b>933</b>
April	724	238	<b>962</b>
May	751	249	<b>1000</b>
June	782	257	<b>1039</b>
July	781	259	<b>1040</b>
August	780	261	<b>1041</b>
September	835	271	<b>1106</b>
October	877	288	<b>1165</b>
November	939	297	<b>1236</b>
December	939	297	<b>1236</b>

<b>TABLE 11 B</b>			
<b>CARE EXPANSION PROGRAM</b>			
<b>Participating Facilities by Month ( Electric )</b>			
<b>2001</b>	<b>CARE Residential</b>	<b>CARE Commercial</b>	
	<b>Facilities</b>	<b>Facilities</b>	<b>Total</b>
January	711	269	<b>980</b>
February	707	270	<b>977</b>
March	731	275	<b>1006</b>
April	762	282	<b>1044</b>
May	794	280	<b>1074</b>
June	845	282	<b>1127</b>
July	847	285	<b>1132</b>
August	843	289	<b>1132</b>
September	897	302	<b>1199</b>
October	941	322	<b>1263</b>
November	1019	349	<b>1368</b>
December	1019	349	<b>1368</b>



<b>TABLE 12</b>		
<b>CARE EXPANSION PROGRAM</b>		
<b>Average Monthly Gas / Electric Usage<sup>1</sup></b>		
	<b>Gas</b>	<b>Electric</b>
<b>Customer</b>	<b>Therms</b>	<b>KWh</b>
Residential Facilities	61	836
Commercial Facilities	506	5,964

1 Excludes master meter usage.

<b>TABLE 13a</b>					
<b>CARE Expansion Program</b>					
<b>CARE Outreach Pilot, Other Outreach, and Utility<sup>1</sup></b>					
	<b>CARE Applications Sent By Third Parties</b>				
<b>Entity</b>	<b>Received</b>	<b>Approved</b>	<b>Denied</b>	<b>Pending/ Incomplete</b>	<b>Duplicates</b>
Hill and Knowlton Call Center Operations	1	0	0	0	1
Agency	3	0	0	0	3
<b>Total</b>	<b>4</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>4</b>
<b>Percentage</b>	<b>100%</b>	<b>0%</b>	<b>0%</b>	<b>0%</b>	<b>100%</b>

\* Only four Expansion program applications received from third-party sources during reporting period.

<b>TABLE 13b</b>				
<b>CARE EXPANSION PROGRAM</b>				
<b>Total number of utility CARE Expansion program applications</b>				
<b>Month</b>	<b>Received</b>	<b>Approved</b>	<b>Denied</b>	<b>Pending/ Incomplete</b>
Jan	4	0	0	4
Feb	4	2	1	1
Mar	1156	1155	1	0
Apr	158	155	2	1
May	175	149	16	10
Jun	151	129	22	0
Jul	16	8	1	7
Aug	19	17	0	2
Sep	207	197	2	8
Oct	340	335	5	0
Nov	88	85	3	0
Dec	203	200	3	0
<b>Total</b>	<b>2521</b>	<b>2432</b>	<b>56</b>	<b>33</b>

## **ATTACHMENT A**

### **TECHNICAL ADDENDUM: JOINT-UTILITY METHODOLOGY FOR CALCULATING CARE PENETRATION**

**Workshop on Penetration Rates for  
CARE and ULTS Programs**

**February 6, 2002**

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## Joint-Utility Methodology for Calculating CARE Penetration: Technical Description

### INTRODUCTION

This document discusses existing methods used by the joint energy utilities and raises methodological issues regarding estimating CARE eligibility and penetration. This serves as a technical supplement to the joint utilities' presentation on their methodology for calculating CARE penetration rates as given at the Workshop on Penetration Rates for CARE and ULTS Programs on February 6, 2002. The remaining sections of this document contain: an example table showing the joint distribution of household size and income from PUMS; example tables showing the separate current-year distributions for household size and household income from the commercial data vendor; detailed information on iterative proportional fitting; a list of data used in the estimation work; and, definitions of technical terminology.

### Objective of the Method

The initial objective presented to the consultant, Athens Research, was to estimate annually, for each unique county/utility/ commodity (fuel type), the proportion of technically eligible utility-served households (i.e., the fraction of individual residential meters and qualified sub-meters that are eligible for CARE based on household size and household income). The CARE demographic eligibility rate (i.e., ratio or proportion) was to be estimated annually, and utilities were to apply that ratio to their quarterly counts on individual residential meters and qualified sub-meters (i.e., technical eligibility) to obtain updated CARE eligibility counts. The second objective was to streamline and document the estimation programs, and to complete sensitivity tests and validation exercises begun during the estimation period. This second objective is only now being undertaken, a delay due in small part to additional ad hoc exercises that were added by the Commission, including estimating LIEE demographic eligibility, and estimating the rural and non-rural shares of each unique county/utility/commodity's (CUC's) total eligibility.

### Major Features of the Method

The method combines current-year estimates of household size distributions and household income (separate distributions) with Census year estimates of the joint distribution of household size and household income, to estimate current-year demographic eligibility. Census year income data from PUMS (sample household long form Census data) is transformed to account for CPI changes in California, and to conform to categories of income available in current-year vendor data. Meter/sub-meter information from each utility is used to tailor demographic eligibility to specific CUC's.

Specifically, the *joint* distribution of household size and income available from PUMS is modified using *iterative proportional fitting*<sup>2</sup> to match current-year distributions on household size and income, providing a new estimate of the joint distribution. From the new joint distribution, current-year demographic eligibility per CUC is estimated; this is applied to quarterly counts of technical eligibility by utility staff, to obtain quarterly program eligibility count estimates. Finally, the total number of CARE participants (taken from utility program records) is divided by the total counts of program eligibility to calculate the CARE eligibility rate for a specific CUC.

### Description of THE METHOD

Experience has shown that the method is somewhat better understood if the core process is described first, followed by a description of the preceding steps that are completed prior to carrying out the core process. Having this in mind, we begin with an overview of the core process.

### Core Process

For each and every unique county/utility/commodity (fuel type), we have several key matrices or tables, defined by the household size categories that are available in current-year vendor data and the household

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<sup>2</sup> See the subsequent section on iterative proportional fitting for a detailed technical explanation of this method.

income categories (ranges) that are used in current-year vendor data.<sup>3</sup> The first matrix or table, Table 1, has 14 rows and 6 columns (14 x 6) and contains the *joint income by household size* distribution observed in the most recent PUMS data set (PUMS 1990 in our case). Incomes are given in current-year dollars (CPI adjusted), and as previously indicated, the income categories match those used in the vendor data. Each cell of this table contains the number of households for a particular income category and household size. For example, cell XYZ shows the number of households in income range \$20,000 – \$24,999 and household size 3. Note this table is arbitrarily normalized so that the sum of all the cells in the table totals 1,000,000 and could be normalized to any number as long as the relationship between household income and size remains the same.

The second table, Table 2, is also 14 x 6, and its cells show, for every corresponding cell in Table 1, the proportion of households that would have been program eligible based on current-year dollars. In all but six or seven cells, the proportion of eligible households equals either 1 (i.e., all households are eligible) or 0 (i.e., no households are eligible). For one cell in each household size group 1-5, and for one or two cells in the household size group 6+, some households will be above and some below the size/income threshold for CARE, so that the proportion in the cell equals a value between 0 and 1.<sup>4</sup> Note that Table 2 can be constructed to reflect CARE, LIEE, or any other program eligibility standard. For example, with respect to the LIEE program, we have constructed an alternative, which gives the proportion of households that are eligible at either the 175% eligibility level or the 200% eligibility level applicable where the head is age 60 or work-prevented.

Next, to represent the current-year income distribution, we construct from vendor data, a set of current-year household income marginals (i.e., the number of households in each of the fourteen current-year household income ranges). For example, in Table 3 below, cell ABC shows the number of households in the income range, \$15,000 - \$19,999. As in the case for Table 1, the total of all the cells in this 14 x 1 table is normalized to a total of 1,000,000 for convenience.

To represent the current-year household size distribution, we construct from vendor data, a set of current-year household size marginals (i.e., the number of households in each of the six current-year household size categories). For example, in Table 4 below, cell DEF shows the number of households with a household size equal to 5. Notice that these two separate distributions (e.g., the current-year household income distribution and the current-year household size distribution are “pieces” of a joint distribution of household income and size.

Table 1		Joint Distribution of Household Income and Size (1990)					
		Household Size Categories					
Household Income	Income Ranges	1	2	3	4	5	6+
	0-4,999			...			
	5,000-9,999			...			
	10,000-14,999			...			

<sup>3</sup> For the purposes of this project, Applied Geographic Systems is the commercial data vendor who provided the current-year income and household size distribution data. There were six categories for household size (1, 2, 3, 4, 5, 6+) and 14 categories (ranges) of income (\$0-\$40,000 by intervals of \$5,000, followed by somewhat larger intervals at higher income levels).

<sup>4</sup> The proportions in the first column of Table 2 are given only for example and should not be viewed as actual values.

	15,000-19,999			...			
	20,000-24,999	...	...	XYZ	...	...	...
	25,000-29,999			...			
	30,000-34,999			...			
	35,000-39,999			...			
	40,000-49,999			...			
	50,000-59,999			...			
	60,000-74,999			...			
	75,000-99,999			...			
	100,000-124,999			...			
	125,000+			...			

Table 2		Proportions of Eligible Households by Income/Size (\$2001)					
		Household Size Categories					
Household Income	Income Ranges	1	2	3	4	5	6+
	0-4,999	1					
	5,000-9,999	1					
	10,000-14,999	...					
	15,000-19,999	...					
	20,000-24,999	e.g., 0.47					
	25,000-29,999	0					
	30,000-34,999	0					
	35,000-39,999	0					
	40,000-49,999	...					
	50,000-59,999	...					
	60,000-74,999	...					
	75,000-99,999	...					
	100,000-124,999	...					
	125,000+	...					

Table 3	Current-Year Distribution of Household Income	
Household Income	Income Ranges	Number of Households
	0-4,999	...
	5,000-9,999	...
	10,000-14,999	...
	15,000-19,999	ABC
	20,000-24,999	...
	25,000-29,999	...
	30,000-34,999	...
	35,000-39,999	...
	40,000-49,999	...
	50,000-59,999	...
	60,000-74,999	...
	75,000-99,999	...
	100,000-124,999	...
	125,000+	...

Table 4	Current-Year Distribution of Household Size					
	Household Size Categories					
	1	2	3	4	5	6+
Number of Households	...	...	...	...	DEF	...



With these matrices in hand, we use *iterative proportional fitting* to modify the distribution in Table 1 to match the current-year household income and size distributions in Tables 3 and 4, respectively. This means alternately normalizing rows of Table 1 to match Table 3, and columns of Table 1 to match Table 4, repeating the process until the normalizations stop changing the interior cells of (modified) Table 1. The resultant modified table (not explicitly shown here) is the estimated current-year joint distribution of household income and size. Note that this table is adjusted for the change between 1990 and the current year, with respect to household size and household income, while preserving the joint relationship between size and income.

Finally, to achieve the estimated proportion of CARE eligible households, we first multiply each cell of the table containing the estimated current-year joint distribution of household income and size by Table 2 (the table showing the proportions of eligible households for each income/size group). Then, we sum all of the cells to obtain the number of eligible households per million, which can be converted to the demographic eligibility rate for a particular county/utility/commodity (fuel type) or CUC.

### How the Matrices Used in the Core Process are Produced

PUMS household records are processed to reflect current-year income (CPI-adjusted), the income categories that are used in the current-year vendor data, and to match the level of household size detail in the vendor data. In the processing of PUMS household income data, we create alternatives with respect to smoothing the reported values. Briefly, we may leave the income data at its reported value and correct it via CPI, or we may address the large number of responses that are given at popular rounded values, using a variety of possible smoothing algorithms. The algorithm chosen for use here lead to more stable results than leaving the data in raw form, and was not significantly different from more extreme smoothing techniques.

PUMS household records are identified at the PUMA level (a geographic level of aggregation equivalent to 100,000 in population). Vendor data is available at the block group level. We use MABLE tables (tables of Census data developed by the Missouri Census Data Center, nationwide), to allocate the data in these files to the block group/zip code level, using standard correspondence table techniques. This places the data in a geographic “least common denominator” that can be flexibly added up to reflect specific geographies pertaining to counties and utilities. Utility records on meter/sub-meter presence were obtained for late spring 2001. These were also disaggregated to the block group/zip code level.

With these disaggregations/allocations completed, we were in a position to aggregate the data to reflect county/block group/zip code combinations in which the utility is present. Various definitions of “presence” are possible in this context. For example, records can be weighted to: 1) reflect the utility meter/sub-meter count in each county/block group/zip code; 2) reflect the simple presence/absence of the utility in the small geography; or, 3) be limited to cases where at least 100 utility meters/sub-meters are found in the relevant zip code. In all cases, it appears that the method is robust under variations on the weighting scheme; we chose to use the utility count as a weight in producing county/utility/commodity-specific tables for Tables 1-4, respectively.

In all, we produce a total of more than 200 unique aggregations of county/utility/commodity (fuel type) for input into the “core process” described above, for both CARE (and LIEE) eligibility, under various eligibility scenarios.

### USING THE ESTIMATES

#### Calculating Eligible Utility-Served Households Per CUC

On a quarterly basis, utilities identify and count technically eligible meters and sub-meters for specific commodities (fuel types) within each of the counties in their territory. The demographic eligibility rates for CARE (and LIEE), produced by the consultant, are multiplied by the quarterly technical eligibility counts to calculate the number of CARE-eligible households (and the slightly larger number of LIEE-eligible households).

### Deriving Urban/Rural Shares of CUC Eligibility

For each county/utility/commodity (fuel type), the consultant was asked to provide an estimate of the proportion of eligible households in rural and non-rural locations. Using the technical eligibility data that was provided by the utilities for late spring 2001 and vendor data on the distribution of household size and household income in each California zip code, we disaggregate the total eligibility per CUC to specific CUC/zip code combinations in the utility territory. For each CUC/zip code, the share of CUC eligibility is calculated. Using the Rural Health Council (RHC)/Zipinfo categorization of zip codes, the shares of rural and non-rural zip codes within each CUC are summed to provide a rural/non rural split per CUC. This “split” is also used to allocate eligibility totals per CUC.

### Utility or Study-Specific Uses

SDG&E have used the CARE (and LIEE) disaggregations to the zip code level in internal studies of its programs. Also, block group disaggregations of eligibility will be used by the Phase II contractor for the Low Income Residential Needs Assessment Study, as a means of identifying high and low concentrations of program eligibility for onsite sampling purposes.

### DOCUMENTATION/STREAMLINING/SENSITIVITY TESTING/VALIDATION

The second phase of the CARE eligibility estimation project will:

1. Complete the documentation for the project.
2. Streamline programs that include investigative portions no longer needed, and make portions of the programming job stream more general.
3. Complete sensitivity tests that were set up during the estimation phase, involving income smoothing alternatives, three different methods of weighting block group/zip records to match CUC's, and an analysis of whether differences between program and Census definitions of household incomes influence eligibility estimates significantly.
4. Extend the validation efforts that were begun in July/August 2002.

## Joint-Utility Methodology for Calculating CARE Penetration: Example Distributions

The following tables are examples of the following distributions: a) the joint distribution of household income and size (PUMS); b) the current-year distribution of household income (vendor data); and c) the current-year distribution of household size (vendor data). The PUMS data is for a specific PUMA with income given in current-year (2001) dollars, and the vendor data is for a specific block group. These are the initial tables used prior to beginning the core process.

Table A		Joint Distribution of Household Income and Size (PUMS)					
		Household Size Categories					
Household Income	Income Ranges	1	2	3	4	5	6+
	0-4,999	146	138	78	16	40	18
	5,000-9,999	337	27	0	0	26	0
	10,000-14,999	201	315	49	29	0	53
	15,000-19,999	328	189	102	18	16	0
	20,000-24,999	526	424	82	152	16	34
	25,000-29,999	593	168	88	90	130	0
	30,000-34,999	422	383	135	87	32	99
	35,000-39,999	475	555	159	172	31	26
	40,000-49,999	940	1094	407	442	143	196
	50,000-59,999	913	1215	667	469	73	150
	60,000-74,999	785	2131	823	902	401	204
	75,000-99,999	476	2640	1934	1598	624	255
	100,000-124,999	183	1969	1480	1647	403	319
	125,000+	258	2645	2217	2287	985	522

Table B	Current-Year Distribution of Household Income (Vendor Data)	
Household Income	Income Ranges	Number of Households
	0-4,999	3
	5,000-9,999	9
	10,000-14,999	4
	15,000-19,999	38
	20,000-24,999	19
	25,000-29,999	18
	30,000-34,999	29
	35,000-39,999	29
	40,000-49,999	54
	50,000-59,999	69
	60,000-74,999	87
	75,000-99,999	154
	100,000-124,999	65
	125,000+	28

Table C	Current-Year Distribution of Household Size (Vendor Data)					
	Household Size Categories					
	1	2	3	4	5	6+
Number of Households	129	156	110	113	48	50

## **Joint-Utility Methodology for Calculating CARE Penetration: Iterative Proportional Fitting**

The following excerpt was taken from, The Methods and Materials of Demography condensed version, by Henry S. Shryock and Jacob S. Siegel (Academic Press, 1978). This supplement is intended to provide detailed technical information on iterative proportional fitting. Numbered pages 544-547 of this document demonstrate cases where adjustments of distributions to marginals are required (similar to that described in the 'Core Method' section above); and, numbered pages 547-549 deal, specifically, with iterative proportional fitting as a method for carrying out this adjustment.

## **Technical Definitions**

*Technical Eligibility:* Indicates that a household has an individual residential meter or qualified sub-meter.

Demographic Eligibility: Indicates that a household satisfies CARE eligibility rules based on household size and income.

Block Group: A subdivision of a census tract (or, in 1990, a block numbering area) that is the smallest geographic unit for which the Census Bureau tabulates 100-percent data. Many blocks correspond to individual city blocks bounded by streets, but blocks – especially in rural areas – may include many square miles and may have some boundaries that are not streets. The Census Bureau established blocks covering the entire nation for the first time in 1990. Previous censuses back to 1940 had blocks established only for part of the nation.

Iterative Proportional Fitting: A standard method used in demography and other sciences when adjustments of distributions to marginals are required.

## **Data Sources**

### **Key sources**

The following identifies primary data sources and provides brief summaries of roles these data played in the analysis/estimation work.

### **PUMS1990: Source of Cross-Tabulation of Income by Household Size.**

The Public Use Microdata Samples are based on long form Census responses by a sample of 5% of Census households. Household income and household size are available in this data set. The PUMAs (geographical areas for PUMS) must be disaggregated to match up with other data sets.

### **AGS2000, 2001, and 2005 (Vendor Data)**

Applied Geographic System's demographic estimates for 2000 and 2005 are available via Tetrad, Inc., which supplies the estimates as part of a geographic information system product. We obtained statewide California data from the "Core Demographic Data" product, purchasing both county/block group level data and zip code level data. AGS is a respected firm sharing the demographic data niche with Claritas, Experian, Acxiom, and other suppliers. AGS data were purchased for Athens Research use, essentially to meet the need originally met by Claritas, which was not purchased by Edison during the recent energy and financial crisis. For most of our work, we used county/block group data from AGS. However, in disaggregating estimates to the zip code level to develop rural/urban splits, zip code data from AGS was applied as well.

### **Utility Data on Technical Eligibility**

From each of the four utilities, we obtained county/zip/commodity (fuel type) level counts of individual residential meters and qualified sub-meters. These data were used, primarily, in conforming AGS data and PUMS data to the utility territory and, secondarily, in providing working estimates of total eligibility once demographic eligibility rates had been estimated. The data were obtained in June and July of 2001 from each of the IOU's.

### **MABLE Tables**

During the 1990's, the Missouri Census Data Center took on the task of creating massive correspondence tables linking various Census and non-Census geographies. From the MABLE tables, we produced tables based on population distribution, household distribution, and acreage for use in linking PUMS data (PUMA level), AGS data (block group or zip level), and utility data (county/zip level) at a "lowest common denominator" county/block group/zip code geography. This linkage allowed re-aggregation of the data for various estimation purposes.

### **California CPI Data**

State DOF data on historical CPI levels was critical to translating 1990 PUMS data into current-year dollars for eligibility estimation purposes.

### **The Rural Health Council (RHC)/Zipinfo Tables**

To identify California zip codes that are rural, we were provided a table developed by the Rural Health Council (RHC), and also obtained a table (from Zipinfo) that implements the “Goldsmith” method of categorizing zip codes. The RHC method required by the CPUC took precedence in the classification, but zip codes not explicitly classified by the RHC are classified using the Goldsmith categorization.

### **Secondary sources**

The following identifies secondary data sources and provides brief summaries of roles these data played in the analysis/estimation work.

### **Claritas**

During the latter 1990’s, Southern California Edison’s method of estimating eligibility involved using changes in the percentage of households that are low income to adjust initial eligibility estimates based on PUMS 1990 data. We have used some recent Claritas data to compare and validate estimates based on the statewide procedure, which for the moment uses Applied Geographic Systems’ current-year estimates.

### **SCAG**

Informal and preliminary validation of estimates, and the AGS data underlying the estimates included SCAG estimates for year 2000 on median household incomes at the county level.

### **CENSUS Interim Models**

Similarly, we have compared county-level estimates to household income estimates produced by the Census for the year 1997, based on modeling work done by Census staff.

### **HUD Data**

We have informally and preliminarily compared our results and the underlying AGS data to HUD county level data on household and family incomes.



## ATTACHMENT B

CARE Initiative (A)	Summary (B)	Timeline (C)	Status (D)
<b>Leveraging and Outreach</b>			
CARE Eligibility Bill Inserts	Prepared and distributed bill inserts advertising the increase in CARE eligibility guidelines.	June-July 2001	Completed
CARE Discount Bill Inserts	Prepared and distributed bill inserts advertising the increase in the CARE discount from 15% to 20%.	June-July 2001	Completed
Sub-Metered CARE Customer Mass Mailing	Distributed 1,900 packets of information on CARE including applications for distribution within sub-metered facilities	June-July 2001	Completed
Santa Cruz 100% CARE Campaign (Energy Services / CAB of Santa Cruz County)	Santa Cruz 100% CARE Campaign is a joint project with Energy Services / CAB of Santa Cruz County. This campaign combines the efforts of three counties' public assistance programs (and includes CBOs within the three target counties) to provide outreach and enrollment services for CARE within the San Benito, Santa Cruz and Monterey County areas. Targets 100% participation for the population of Santa Cruz, Monterey and San Benito Counties	May 2001 - December 2001	On-Going; Completed Kick-off
Santa Cruz 100% CARE Campaign (CCC Sub-Contractor CARE application distribution)	As part of the Santa Cruz 100% campaign, CARE applications will be provided through CCC door-to-door CFL campaign	July 2001	In Negotiations
CARE Outreach Pilot Project	Completion of the CARE Outreach Pilot Project. Utilizing 8 contractors and a total of 8 CBO's (two sub-contractors).	June 2000 - September 2001	On-Going
CARE Rapid Deployment Campaign	Working with a contractor to put together a comprehensive CARE plan including specific programs targeted for: African Americans, agricultural workers, Asian Pacific Americans, Latinos, Native Americans, English-language customers, and PG&E employees.	June 2001 - Dec. 2001	On-Going
Northern Valley Indian Health Inc.	PG&E provided Northern Valley Indian Health Incorporated with detailed information on CARE as well as a supply of applications to provide their clients. Additional leads were received from the organization for social workers involved in the Native American community in that area.	June-July 2001	On-Going
Capitation Solicitation	Mailed information regarding Capitation project to native American contacts previously utilized as part of the CARE Outreach Pilot bidding solicitation in 2000. PG&E is working to make the capitation process friendlier and less daunting to these groups than last year's formal RFP process.	July 2001	In Process
CARE Rapid Deployment Campaign	CARE Advertising Campaign Media Kick-off event in Oakland	23-Aug-01	Completed
CARE Program Internet Sub-Site	All applications and information regarding the current CARE programs, including information in Spanish, Chinese and Vietnamese, are available electronically at <a href="http://www.pge.com/care">www.pge.com/care</a> . Information regarding the SBX1 5 Capitation project is also posted on the site.	Aug-01	On-Going

CARE Initiative (A)	Summary (B)	Timeline (C)	Status (D)
<b>Leveraging and Outreach</b>			
CARE Outreach through Employee Associations	Held meetings with the various employee associations within PG&E. Provided training for outreach efforts. Provided applications and collateral materials for the purpose of participating in CARE outreach in the community.	July 2001 - Dec 2001	On-Going
CARE Outreach to Agricultural Employee Housing	Working with group of contractors under the State's OMS to provide enrollment for the facilities under contract with the State on CARE.	Aug-01	On-Going
CARE Toll-Free Line	PG&E launched a new information toll-free line for customers, 1-866-PGE-CARE. The line provides in-depth information about CARE to callers in five languages (Cantonese, English, Mandarin, Spanish and Vietnamese). Beginning September 2001, the line will also provide callers with local community organizations that can provide application assistance.	Aug-01	On-Going
CARE COC Training	As a part of the launch event activities, PG&E approved and trained 36 community outreach contractors for the CARE program. COCs received samples of outreach materials, applications and a list of Frequently Asked Questions.	Aug-01	Completed
Oakland Honors PG&E's CARE Program	Oakland City Council President Ignacio de la Fuentes presented PG&E with a commendation for its work on the CARE program.	Aug-01	Completed
CARE Educational Materials	PG&E introduced a new CARE outreach brochure and table top display to COCs and community leaders. The colorful brochures provide information in four languages (Chinese, English, Spanish and Vietnamese) and encourage readers to call CARE's new toll-free line 1-866-PGE-CARE. Brochures were shipped to COCs, pay stations and elected officials across the service territory to distribute to the community.	Aug. 23	On-Going
CARE Contractors Approved	PG&E approved 42 more CARE contractors serving ethnically diverse customers in various Northern California counties. A total of 78 contractors have been approved.	September	Completed
Pay Station Collateral distribution	PG&E distributed 30,000 brochures and CARE displays to 575 pay stations and service centers	Sep-01	Completed
Contractor Collateral Distribution	PG&E distributed 150,000 brochures and CARE displays to 70 CARE contractors.	September	Completed
Kmart Agrees To Corporate Partnership	The Kmart Corporation agreed to support PG&E's CARE outreach campaign by hosting enrollment events at its Super Kmart store in San Jose and Salinas. In addition, Kmart agreed to distribute CARE educational materials to its customers at these stores.	September	On-Going
CARE Volunteer Badges	To assist CARE contractors in their outreach efforts, PG&E distributed three CARE Volunteer name badges to every approved contractor.	September	Completed

CARE Initiative (A)	Summary (B)	Timeline (C)	Status (D)
<b>Leveraging and Outreach</b>			
CARE Applications in October Bill	PG&E distributes 4.7 million CARE applications in a special October bill insert to all its customers. PG&E created a special, multilingual envelope for the mailing, asking customers in four languages if they want to save \$20 on their PG&E bill.	October	On-Going
CARE Contractors Trained	PG&E trained an additional 18 CARE contractors as part of the CARE outreach and education campaign.	10-Oct	Completed
CARE Informational Church Bulletins	PG&E distributed CARE information church bulletins to African American churches throughout its service territory.	10-Oct	Completed
CARE Day Event Fliers	To promote CARE Day in San Jose, PG&E distributed 10,000 fliers in English, Spanish and Vietnamese to Kmart, pay stations, elected officials and organizations in the San Jose area.	10-Oct	Completed
Dia de los Muertos Festival	PG&E will host a booth at Dia de los Muertos enrolling thousands of customers in CARE.	28-Oct	On-Going
Hmong, Chinese and Vietnamese Flier Distribution	PG&E distributed 5,000 Hmong, Chinese and Vietnamese CARE information fliers to CARE contractors to enhance outreach efforts to these populations. Additionally, all COCs received camera-ready PDF files so they can reprint the fliers as needed.	October	Completed
English-Spanish Flier Distribution	PG&E distributed 5,000 English and Spanish CARE information fliers to CARE contractors to enhance outreach efforts to these populations. Additionally, all COCs received camera-ready fliers so they can reprint the fliers as needed.	October	Completed
School-Based Outreach	To reach CARE eligible families, PG&E is distributing CARE applications to low-income families through the San Francisco, Salinas and Fresno Unified School Districts. Letters were mailed in English, Spanish and Hmong.	September	On-Going
CARE Educational Outreach	Contacted the Association of Northern California Chinese Schools (ANCCS) for the list of 88 member schools as potential CARE contractors	September	Completed
CARE Educational Outreach	Contacted member schools in the Association of Northern California Chinese Schools (ANCCS) about the CARE Program	September-December	On-Going
CARE Educational Outreach	Contacted member schools in the Association of Northern California Chinese Schools (ANCCS) about the CARE Program	September-December	On-Going
CARE Educational Outreach	Contacted Asian American Educational Services for other potential school contractors.	September	Completed
CARE Educational Outreach	Identified other educational institutions (i.e., vocational schools & language schools) for potential CARE contractors.	October	On-Going
CARE Educational Outreach	Sent PG&E information packets to 60 potential school contractors belonging to five different districts and other umbrella organizations (i.e., Au Co, ANCCS)	October	On-Going

CARE Initiative (A)	Summary (B)	Timeline (C)	Status (D)
<b>Leveraging and Outreach</b>			
CARE Educational Outreach	Identified other potential low-income groups for partnerships (i.e., senior citizens associations & veterans' associations).	October	On-Going
CARE Educational Outreach	Distributed in-language flyers and brochures to prospective school contractors.	September-December	On-Going
CARE Day in San Jose	Conduct outreach to the Asian media to secure coverage of the sign-up event in San Jose.	October	Completed
CARE Day in San Jose	Contacted COCs to encourage them to participate in the sign-up event in San Jose.	October	Completed
CARE Day in San Jose	Super Kmart in San Jose promoted PG&E's CARE Day through its Blue Light Specials. The announcements were made in English and Spanish.	October	Completed
CARE Day in San Jose	In effort to boost enrollment at CARE Day in San Jose, PG&E partnered with the GI Forum, a Hispanic veterans group, to distribute fliers and information to eligible families.	October	Completed
CARE Day in San Jose	PG&E distributed fliers to English, Spanish and Vietnamese locations in San Jose in order to raise awareness of the enrollment event	October	Completed
Community Outreach	Sent 1,000 CARE brochures and 7 displays to Joyeria Jalisco in Fresno to reach their customers	October	Completed
Dia de los Muertos Festival	PG&E hosted an event at the festival and enrolled hundreds of customers into the CARE program. The event was staffed by 6 different Community Outreach Contractors and helped to generate awareness of the CARE program	October	Completed
CARE Educational Outreach	The San Francisco and Fresno Mexican Consulates agreed to 3,000 distribute Spanish-language applications to their clients.	October	Completed
CARE COC Training	Trained 8 Community Outreach Contractors in-person at the San Jose CARE Day enrollment event	October	Completed
CARE Educational Outreach	Due to overwhelming requests, PG&E develops Korean-language CARE applications.	October	On- Going
CARE Educational Outreach	The San Francisco Diocese of the Episcopal Church distributed CARE materials to more than 200 churches. The Diocese also included CARE information in its church bulletins.	October	Completed
CARE Educational Outreach	California Power and Light, an organization made up of 300 interfaith organizations, agreed to distribute CARE educational materials to all its members.	November	Completed
PG&E Launches Out-Bound Call Center	In effort to re-enroll PG&E customers who need to recertify their CARE applications, PG&E launched an outbound Call Center. PG&E is contacting nearly 20,000 PG&E customers who are scheduled to drop from the CARE program this fall.	November	On-Going
African American Church Bulletin Announcements	PG&E mailed church bulletin announcements to dozens of African American churches in its service territory. CARE Educational Outreach	October-November	Completed

CARE Initiative (A)	Summary (B)	Timeline (C)	Status (D)
<b>Leveraging and Outreach</b>			
Church Outreach in Salinas	To promote CARE Day in Salinas, PG&E distributed 2,000 event fliers to four Salinas churches, one of which inserted the fliers into the church bulletin.	November	Completed
CARE Day in Salinas	PG&E partnered with the Monterey County Farm Bureau, the California Rural Assistance Center to assist with CARE Day outreach. The organizations included general information about CARE in their newsletter and distributed fliers about the enrollment event. They also are displaying CARE brochures in the office	November	Completed
CARE Day in Salinas	PG&E worked with the Grower-Shipper Association about the enrollment event. They included the flier in a weekly e-mail to all members and are displaying CARE brochures in their office.	November	Completed
CARE Day in Salinas	PG&E mailed 300 enrollment event fliers to local Hispanic markets, El Charrito and La Princesa, as well as to markets highly trafficked by Latinos, including Foods Co.	November	Completed
CARE Day in Salinas	Taylor Farms, a leading employer of agricultural farm workers, disseminated the information to all of the agricultural workers at the organizations on CARE Day in Salinas.	November	Completed
CARE Day in Salinas	Mailed fliers to 75 local organizations to post and distribute in order to raise awareness of the enrollment event	November	Completed
CARE Day in Salinas	Big Kmart in Salinas signed on the CARE campaign as a corporate sponsor distribute fliers and serve as a venue for the event. The store manager also donated a 32-inch television to the CARE Day raffle.	November	Completed
CARE Day in Salinas	Nearly 10 public officials in Salinas, including the State Assemblyman and city council members, spoke at CARE Day in Salinas and distributed CARE Day materials from their offices.	November	Completed
CARE Day in Salinas	As a part of its support for PG&E's CARE program, Big Kmart in Salinas announced CARE Program Blue Light Specials in conjunction with the enrollment event.	11-Nov	Completed
Salinas Declares CARE Day	Salinas Mayor Anna Caballeros declares November 11, 2001 PG&E CARE Day in Salinas.	7-Nov	Completed
CARE Day in Salinas	The Monterey Bay Aquarium joined PG&E's CARE Day in Salinas, helping to educate families on the benefits of the program.	11-Nov	Completed
CARE Educational Outreach	PG&E receives the endorsement of 22 public officials for its CARE program outreach.	November	Completed
CARE COC Training	Trained 13 Community Outreach Contractors via conference call	November	Completed
Asian School Outreach	To reach the large Asian immigrant population, PG&E contacts 40 Asian schools in its service territory to seek their support and involvement in the CARE campaign. School based outreach	November	On-Going

CARE Initiative (A)	Summary (B)	Timeline (C)	Status (D)
<b>Leveraging and Outreach</b>			
Asian Faith-Based Organizations	To reach the thousands of Asian families affiliated with religious organizations, PG&E contacts 120 Asian faith-based organizations to join the CARE campaign.	November	On-Going
California Indian/Native American Database	To reach out to the thousands of California Indian/Native American households in its service territory, PG&E developed a database of more than 175 tribal councils, organizations and community groups service this population.	November-December	On-Going
Sears Agrees to Corporate Sponsorship	Sears agreed to support PG&E's CARE outreach campaign by hosting enrollment events at its Bay Area stores. In addition, Sears agreed to distribute CARE educational materials to its customers at these stores.	November	On-Going
CARE Day at Sears	Fifteen Community Outreach Contractors signed on to host 8 different Sears stores on December 1, 2001 as part of the CARE Day at Sears	November	Completed
CARE Day at Sears	Developed and distributed CARE program banners and signage for Community Outreach Contractors volunteering at CARE Day at Sears	November	Completed
CARE Day at Sears	Raffled off ten Kenmore Elite UltraFresh refrigerators from all applications received during CARE Day at Sears	December	Completed
CARE Day at Sears Added To Toll-free Line	To respond to requests from customers calling about CARE Day at Sears, PG&E adds a special CARE Day prompt on its automated toll-free line. As a result, more than 400 callers selected CARE Day at Sears information over a 3-day period.	November-December	Completed
36,000 Callers to Toll-Free Line	PG&E's toll-free line has proven to be an effective educational tool for customers. In just 16 weeks, the line has logged 36,000 calls in five languages (Cantonese, English, Mandarin, Spanish and Vietnamese). More than 5,000 callers have requested CARE applications through the toll-free line and 3,000 have been referred to CARE community contractors via the line.	December	On-Going
CARE Day at Sears	Enrollment event with 16 Community Outreach Contractors hosting 8 different Sears stores in the Bay Area, Generated over 1,100 CARE applications and dispelled information to thousands.	December	Completed
CARE Outbound Call Center	To assure that every eligible family is enrolled in the CARE program, PG&E calls 9,000 CARE customers who are schedule to renew their CARE discount in January. Callers remind the customers to complete their CARE application and/or resend them an application.	November-December	Completed
CARE Outbound Call Center	PG&E begins calling another 11,000 CARE customers scheduled to renew their discounts in February to make they are not displaced from the program.	December	On-Going
Community Outreach	Approved 6 more Community Outreach Contractors	December	Completed



CARE Initiative (A)	Summary (B)	Timeline (C)	Status (D)
<b>Leveraging and Outreach</b>			
Community Outreach	Extended all Community Outreach Contractors contracts through March 31, 2002, extending the original contract completion date of December 15, 2001	December	Completed
Kwanzaa CARE Event	PG&E partnered with Soul Beat, an African-American television station, and 3 African-American Community Outreach Contractors to host an enrollment event in conjunction with the Kwanzaa holiday	December	Completed
Community Outreach	PG&E approved 10 new Community Outreach Contractors to grassroots outreach program.	January	Completed
Community Outreach	PG&E extended all Community Outreach Contractors contracts through January 15, 2003, extending the original contract for 13 months	January	Completed
CARE Outbound Call Center	PG&E begins calling another 18,000 CARE customers scheduled to renew their discounts in the next few months to make they are not displaced from the program.	January	Completed
CARE Toll-Free Line	In order to make the toll-free line a more valuable tool, PG&E is adding prompts for upcoming CARE events and recertification information	January	On-Going
CARE COC Training	Trained 11 COCs via conference call.	January	Completed
CARE Toll-Free Line	Added CARE Events prompt to toll-free line which gives information about upcoming events and will be updated monthly	January	Completed
CARE Toll-Free Line	Added Recertification prompt which gives information about the CARE recertification process	February	Completed
CARE Toll-Free Line	Re-recorded Spanish, Cantonese and Mandarin sections of the toll-free line	February	Completed
CARE Day in San Luis Obispo County	PG&E partnered with San Luis Obispo County Goodwill stores to host CARE Day in San Luis Obispo County in the five county stores. The enrollment event featured two refrigerator giveaways and a 20% discount on Goodwill purchases	February	Completed
CARE Day in San Luis Obispo County	Developed and distributed CARE program fliers and posters for distribution at Goodwill stores	February	Completed
CARE Day in San Luis Obispo County	Enrolled over 400 customers in the CARE program at 5 different Goodwill stores in San Luis Obispo County	February	Completed
CARE Day in Santa Maria	PG&E partnered with the Santa Maria Big Kmart to host the enrollment event. The enrollment event featured 2 refrigerator giveaways, a public affairs program, live music and refreshments from a local Mexican bakery.	February	Completed
CARE Day in Santa Maria	Developed and distributed CARE Day event fliers and posters for posting and distribution at Big Kmart.	February	Completed
CARE Day in Santa Maria	Generated nearly 350 CARE applications	February	Completed

CARE Initiative (A)	Summary (B)	Timeline (C)	Status (D)
<b>Leveraging and Outreach</b>			
CARE Day in Santa Maria	As part of the Kmart partnership in Santa Maria, bluelight specials were announced prior to and the day of the enrollment event		
CARE Days in San Luis Obispo County and Santa Maria	Printed and distributed 50,000 door hangers promoting the events in San Luis Obispo County and Santa Maria. The door hangers provided information about the enrollment events, as well as listing the income guidelines and the toll-free number	February	Completed
CARE Customer Focus Groups	To better determine the barriers to enrollment to CARE, PG&E conducted four focus groups with CARE eligible but unenrolled customers. These were conducted in language in the Bay Area to English, Spanish, Cantonese and Vietnamese speaking customers.	Jan.-Feb.	Completed
Chinese New Year Event in Oakland	In celebration of the Chinese New Year, PG&E conducted a CARE enrollment drive at the Oakland Chinese New Year Festival. More than 400 customers applied for CARE during the event.	February	Completed
CARE Toll-Free Line Receives 54,000 Calls	PG&E's toll-free line has proven to be an effective educational tool for customers. Since August 15, the line has logged 54,000 calls in five languages (Cantonese, English, Mandarin, Spanish and Vietnamese). More than 7,000 callers have requested CARE applications through the toll-free line and 2,500 have been referred to CARE community contractors via the line.	February	On-Going
Goodwill Industries Partnership	Goodwill Industries joined the CARE campaign as a community partner. Through its partnership, Goodwill produced a public service announcement that aired on KSBY-TV in San Luis Obispo to promote the CARE enrollment events on the Central Coast. Goodwill also produced radio PSAs that aired on various English and Spanish-language radio stations in the area.	January-February	Completed



CARE Initiative (A)	Summary (B)	Timeline (C)	Status (D)
<b>Presentations</b>			
Mayors Conference	Low income Programs: CARE, REACH and LIEE	1/26/2001	Completed
Housing Coalition and SMUD	Low income Programs: CARE, REACH and LIEE to 40 Senior/ Disabled customer/Low income customers	1/25/2001	Completed
Church Service	Low income Programs: CARE, REACH and LIEE to 2000 Moderate to Middle Income/Low Income customers	1/28/2001	Completed
City of Oakland Community Action Agency	Low income Programs: CARE, REACH and LIEE to 50 Senior/ Disabled customer/Low income customers	1/30/2001	Completed
TEAM Coalition	Low income Programs: CARE, REACH and LIEE to 35 Senior/ Disabled customer/Low Income/Hispanic customers	2/1/2001	Completed
Self-Help for the Elderly	Energy crisis, low-income programs including CARE, LIEE, REACH, medical baseline, residential energy efficiency programs and conservation effects, CARE for non-profit. Presentations for Bay Area Chinese-speaking audience	2/28/2001	Completed
Sacramento Housing Coalition	Low Income programs, REACH, Credit & Collections to 50 Senior/ Disabled customer/Low Income/Hispanic customers	3/20/2001	Completed
PG&E Open Forum	REACH, Credit & Collections, Res. Rebates, LIEE update	3/29/2001	Completed
TEAM Coalition	Conservation Tips to 50 Senior/ Disabled customer/Low Income/Hispanic customers	4/5/2001	Completed
Saint Pauls Missionary Baptist Church	CARE, LIEE, REACH, HEAP, 1-2-3 Cashback, current appliance rebates, CFL rebates, RCP to 800 Senior/ Disabled customer/Low Income/Hispanic customers	4/8/2001	Completed
PG&E North Valley(North) Retiree Chapter - Redding	Summer 2001: CARE, LIEE, HEAP, 1-2-3 Cashback, Outages and Blackouts to 70 Seniors - Retired PG&E Employees	4/20/2001	Completed
Self-Help for the Elderly	Cashback 1-2-3, appliance rebates & safety tips to 60 Low -income Senior customers	4/24/2001	Completed
PG&E Silverado Retiree Chapter - Napa	Summer 2001: CARE, LIEE, HEAP, 1-2-3 Cashback, Outages and Blackouts to 45 Seniors - Retired PG&E Employees	4/27/2001	Completed
West CCC Earth Day Event	CARE, LIEE, REACH, HEAP, 1-2-3 Cashback, current appliance rebates, CFL rebates, RCP to 350 Low-Income Seniors/ Disabled customers	4/28/2001	Completed
PG&E Fresno Retiree Chapter	Summer 2001: CARE, LIEE, HEAP, 1-2-3 Cashback, Outages and Blackouts to 70 Seniors - Retired PG&E Employees	5/2/2001	Completed
TEAM Coalition	Conservation Tips, REACH, LIEE, HEAP, Bankruptcy to 50 Senior/ Disabled customer/Low Income/Hispanic customers	5/3/2001	Completed
Farm Workers Alliance	Conservation Tips, REACH, LIEE, CARE program & income guidelines to 300 Sacramento-area people, including CBO's, CSD, Low Income/Hispanic Farmworker Union & Coalitions	5/8/2001	Completed

PG&E Stanislaus/Stockton Retiree Chapter	Summer 2001: CARE, LIEE, HEAP, 1-2-3 Cashback, Outages and Blackouts to 65 Seniors - Retired PG&E Employees	5/8/2001	Completed
<b>CARE Initiative (A)</b>	<b>Summary (B)</b>	<b>Timeline (C)</b>	<b>Status (D)</b>
<b>Presentations</b>			
Career Fair Berkeley Adult School	Conservation Tips, CARE, REACH, LIEE, HEAP, 1-2-3 Cashback, current appliance rebates, CFL rebates, RCP, Job opportunities to 200 Low-income, Disabled, Hispanic, Student customers	5/10/2001	Completed
PG&E East Bay Retiree Chapter - Oakland	Summer 2001: CARE, LIEE, HEAP, 1-2-3 Cashback, Outages and Blackouts to 170 Seniors - Retired PG&E Employees	5/18/2001	Completed
Chandler Tripp School -- San Jose	CARE, LIEE, REACH, HEAP, 1-2-3 Cashback, current appliance rebates, CFL rebates, RCP, Residential/Apartment 123 Energy Reduction Action Plans to 30 Low-income, Disabled, Hispanic, Student customers	5/18/2001	Completed
SMUD Coalition	CARE, LIEE, REACH, HEAP, 1-2-3 Cashback, current appliance rebates, CFL rebates, RCP to 150 Low-Income Seniors, Disabled, Hispanic customers	5/22/2001	Completed
Alameda Cnty Empl Svcs Unit	CARE, LIEE, REACH to 30 Low-Income Seniors, Disabled, Hispanic customers	5/23/2001	Completed
PG&E Los Padres Retiree Chapter - San Luis Obispo	Summer 2001: CARE, LIEE, HEAP, & 1-2-3 Cashback, Outages and Blackouts to 80 Seniors - Retired PG&E Employees	5/24/2001	Completed
Salvation Army Center - Lodi	CARE, LIEE, REACH, HEAP, 1-2-3 Cashback, current appliance rebates, CFL rebates, RCP, Residential/Apartment 123 Energy Reduction Action Plans to 30 Low-Income Seniors	5/29/2001	Completed
PG&E North Bay Retiree Chapter - Fairfax	Summer 2001: CARE, LIEE, HEAP, 1-2-3 Cashback, Outages and Blackouts to 110 Seniors - Retired PG&E Employees	6/1/2001	Completed
Annual PSEA Retiree Picnic - Lodi	Summer 2001: CARE, LIEE, HEAP, 1-2-3 Cashback, Outages and Blackouts to 660 Seniors - Retired PG&E Employees	6/6/2001	Completed
PG&E Coast Valley/Moss Landing Retirees	Summer 2001: CARE, LIEE, HEAP, 1-2-3 Cashback, Outages and Blackouts to 125 Seniors - Retired PG&E Employees	6/6/2001	Completed
PG&E Drum Retiree Chapter - Auburn	Summer 2001: CARE, LIEE, HEAP, 1-2-3 Cashback, Outages and Blackouts to 155 Seniors - Retired PG&E Employees	6/10/2001	Completed
Child Development Center - Mt. View	CARE, LIEE, REACH, HEAP, 1-2-3 Cashback, current appliance rebates, CFL rebates, RCP, Residential/Apartment 123 Energy Reduction Action Plans, 20/20 to 50 Low-Income, Hispanic Parents, Renters	6/12/2001	Completed
PG&E Yosemite Retiree Chapter - Los Banos	Summer 2001: CARE, LIEE, HEAP, 1-2-3 Cashback, Outages and Blackouts to 55 Seniors - Retired PG&E Employees	6/12/2001	Completed

PG&E SF/Peninsula Retiree Chapter	Summer 2001: CARE, LIEE, HEAP, 1-2-3 Cashback, Outages and Blackouts to 180 Seniors - Retired PG&E Employees	6/12/2001	Completed
<b>CARE Initiative (A)</b>	<b>Summary (B)</b>	<b>Timeline (C)</b>	<b>Status (D)</b>
<b>Presentations</b>			
SMUD Utility Workshop	CARE, LIEE, REACH, 1-2-3, Outage Safety to 30 Caregivers for Low-Income, Hispanic/Disabled customers	6/13/2001	Completed
AEA Members	Summer 2001: CARE, LIEE, HEAP, 1-2-3 Cashback, Outages and Blackouts to 20 Asian Employees Association members	6/14/2001	Completed
AHMA Utility Workshop - Oakland	Conservation, rebates, education, and specialized HUD programs, CARE, LIEE, REACH, 1-2-3, 20/20 to 45 HUD Multi Family customers	6/18/2001	Completed
Union City Health Clinic Staff Meeting	CARE, LIEE, REACH, HEAP, 1-2-3 Cashback, current appliance rebates, CFL rebates, RCP, Residential/ Apartment 123, Energy Reduction, Action Plans, 20/20, Energy Crisis to 100 Caregivers for Low-Income, Hispanic/Disabled customers	6/22/2001	Completed
Woodland UW Outreach	Low income Programs: CARE, REACH and LIEE to 15 Seniors/Low Income customers	6/26/2001	Completed
Newark Second Chance	CARE, LIEE, REACH, HEAP, 1-2-3 Cashback, current appliance rebates CFL rebates, RCP, Residential/Apartment 123 Energy Reduction Action Plans, Energy Crisis to 35 Caregivers for Low-Income, Hispanic/Disabled customers	6/27/2001	Completed
Mount Diablo Medical Center	CARE, LIEE, REACH, HEAP, 1-2-3 Cashback, current appliance rebate, CFL rebates, RCP, Residential/Apartment 123, Energy Reduction, Action Plans, Energy Crisis to 50 Low-Income, Seniors/Disabled customers	6/27/2001	Completed
TEAM Coalition	Low Income programs, Conservation, Jobs to 50 Caregivers for Low-Income, Hispanic/Disabled customers	7/5/2001	Completed
Retired Marin County Employees	Summer 2001: CARE, LIEE, HEAP, 1-2-3 Cashback, Outages and Blackouts to 55 Seniors	7/10/2001	Completed
Marin Sons In Retirement - Fairfax	Summer 2001: CARE, LIEE, HEAP, 1-2-3 Cashback, Outages and Blackouts to 115 Seniors	7/12/2001	Completed
Alameda County Dept. on Aging	Low income Programs: CARE, REACH and LIEE to 65 Senior/ Disabled customer/ Low income/ Hispanic/ Chinese customers	7/13/2001	Completed
Affordable Housing	LIEE Programs, LIEE, CARE to 10 HUD Multi Family, Sen Feinstein Office Reps.	7/17/2001	Completed
TPI Vendors Training - Stkn.	CARE, LIEE, RCP & 1-2-3 Cashback to Providers for Low-Income customers	7/19/2001	Completed
SF County Depart. On Aging	Low income Programs: CARE, REACH and LIEE to 45 Senior/ Disabled customer/ Low income/ Hispanic/ Chinese/ Vietnamese customers	7/19/2001	Completed
Supervisor Leland Yee's Asian Community Liaison	CARE, LIEE, HEAP, & 1-2-3 Cashback, appliance rebates, RCP to Chinese community	7/23/2000	Completed

PG&E Humboldt Chapter Retirees - Fortuna	Summer 2001: CARE, LIEE, HEAP, 1-2-3 Cashback, Outages and Blackouts to 65 Seniors - Retired PG&E Employees	7/24/2001	Completed
<b>CARE Initiative (A)</b>	<b>Summary (B)</b>	<b>Timeline (C)</b>	<b>Status (D)</b>
<b>Presentations</b>			
Outer Sunset Neighborhood Senior Center District Advisory Council	CARE, LIEE, HEAP, 1-2-3 Cashback, appliance rebates, RCP to 20 Seniors in Bay Area	7/26/2001	Completed
TEAM Coalition	Low Income programs, Conservation, Jobs to 50 Caregivers for Low-Income, Hispanic/Disabled customers	8/2/2001	Completed
Plaza Del Rey Mobile Home Assoc.	CARE, LIEE, HEAP, 1-2-3 Cashback, Outages and Blackouts to 50 Sunnyvale Seniors/Disabled customers	8/7/2001	Completed
PG&E Stockton/Stanslaus Retirees	Summer 2001: CARE, LIEE, HEAP, & 1-2-3 Cashback, Outages and Blackouts to Big Trees State Park/Arnold area Seniors - Retired PG&E Employees	8/8/2001	Completed
West Contra Costa Senior Coalition	Low income Programs: CARE, REACH and LIEE to 15 Seniors, Low Income customers	8/8/2001	Completed
SMUD Coalition	CARE, LIEE, REACH, 1-2-3, Outage Safety to 30 Caregivers for Low-Income, Hispanic/Disabled customers	8/8/2001	Completed
Outer Sunset Neighborhood Senior Center	CARE, LIEE, 1-2-3 Cashback to 70 Chinese speaking Seniors	8/8/2001	Completed
Ca Energy Forum - Fisherman's Wharf Hilton	CARE, LIEE, Financial Assistance Prog. to San Francisco Utility Providers	8/9/2001	Completed
Santa Clara County Dept. on Aging	Low income Programs: CARE, REACH and LIEE to 22 Seniors/Low Income customers	8/9/2001	Completed
Assemblywoman Rebecca Cohn's Committee Hearing	Low income Programs: CARE, REACH and LIEE to 30 Seniors/Low Income customers	8/9/2001	Completed
2001 Westside Energy Fair	CARE, EP, HEAP, 1-2-3 Cashback, appliance rebates, RCP to 2000 San Francisco Sunset residents, 90% Chinese	8/11/2001	Completed
Disability Leaders Meeting	Low income Programs: CARE, REACH and LIEE to Disabled customers	8/13/2001	Completed
Sirs of Central Marin	Summer 2001: CARE, LIEE, HEAP, 1-2-3 Cashback, Outages and Blackouts to San Rafael Seniors	8/14/2001	Completed
Sirs of Southern Marin	Summer 2001: CARE, LIEE, HEAP, 1-2-3 Cashback, Outages and Blackouts to Fairfax Seniors	8/16/2001	Completed
HUD Housing -- San Leandro	Conservation, Outages, Financial Assistance Prog to 100 Low-Income, Seniors/Disabled customers	8/16/2001	Completed
CARE Day in Oakland	CARE, LIEE, 1-2-3 Cashback to 200 Low-income Hispanic customers	8/23/2001	Completed
Fruitvale Area CARE kickoff	CARE and LIEE to Low-Income, Seniors/Disabled customers	8/23/2001	Completed
Energy Forum w/Liz Figueroa	Conservation, Outages, Financial Assistance Prog, EP, CARE to 30 Low-Income, Seniors/Disabled customers	8/23/2001	Completed

Yu Ai Kai Senior Center - San Jose	Low income Programs: CARE, REACH and LIEE to 130 Seniors and Low Income seniors	8/24/2001	Completed
<b>CARE Initiative (A)</b>	<b>Summary (B)</b>	<b>Timeline (C)</b>	<b>Status (D)</b>
<b>Presentations</b>			
Salvation Army Center - Fairfield	CARE, EP, Financial Assistance Prog., 1-2-3 Cashback, appliance rebates, Outages, 20/20 to Low-Income, Seniors/Disabled customers	8/24/2001	Completed
Yu-Ai-Kai Senior Center - San Jose	CARE, EP HEAP, 1-2-3 Cashback, appliance rebates, RCP to Low-Income, Seniors/Disabled Asian Pop.	8/24/2001	Completed
Tiburcio Vasquez Health Center	CARE, EP, HR to 100 Low-Income, Seniors/Disabled, Hispanic customers	8/25/2001	Completed
Sunnyvale Multi-services Center	CARE, LIEE, Outage safety to 60 Chinese speaking seniors	8/27/2001	Completed
Sunnyvale Multi-Services Center	CARE, EP, Outage safety to 60 Chinese speaking seniors	8/27/2001	Completed
Congress of Ca. Srs.--Earlimart	1-2-3- Cashback, CARE, Outage prep to Earlimart Low-Income, Seniors/Disabled customers	8/28/2001	Completed
Hong Fook Senior Center	CARE, EP, Medical Baseline to 15 Social workers	9/4/2001	Completed
Jewish Family and Children Services	CARE, EP, Medical Baseline, 1-2-3 Cashback to 40 Senior citizens	9/6/2001	Completed
TEAM Coalition	CARE, EP, HR, Financial Assistance to 20 Low-Income, Seniors/Disabled customers	9/6/2001	Completed
Southeast Asian Community Center	CARE, EP, 1-2-3 Cashback to 60 Low-income Vietnamese Immigrants	9/8/2001	Completed
Oakland First AME Church Health & Community Fair	CARE, LIEE, other PG&E Residential programs to 200 Residential/Low income customers	9/8/2001	Completed
PG&E San Jose /DeAnza Retiree Chapter	Summer 2001: CARE, LIEE, HEAP, 1-2-3 Cashback, Outages and Blackouts to San Jose Seniors - Retired PG&E Employees	9/11/2001	Completed
SMUD Coalition	CARE, EP, Financial Assistance Prog to 30 Caregivers for Low-Income, Hispanic/Disabled customers	9/12/2001	Completed
Ross Valley SIRS	Summer 2001: CARE, LIEE, HEAP, 1-2-3 Cashback, Outages and Blackouts to Fairfax Seniors - Retired PG&E Employees	9/13/2001	Completed
City of Oakland Community & Economic Development Agency	CARE, EP, 1-2-3 Cashback, Financial Assistance Prg. to Caregivers for Low-Income/ Senior/ Disabled/ Hispanic customers	9/17/2001	Completed
PG&E Drum Retiree Chapter	Summer 2001: CARE, LIEE, HEAP, 1-2-3 Cashback, Outages and Blackouts to Auburn Seniors	9/19/2001	Completed
PG&E Sacramento Retiree Chapter	Summer 2001: CARE, LIEE, HEAP, 1-2-3 Cashback, Outages and Blackouts to Sacramento Seniors - Retired PG&E Employees	9/21/2001	Completed
PG&E North Valley (North) Retiree Chapter	Summer 2001: CARE, LIEE, HEAP, 1-2-3 Cashback, Outages and Blackouts to Red Bluff Seniors - Retired PG&E Employees	9/21/2001	Completed

Salinas Arbor Career Center Monthly Workshop	CARE, LIEE, other PG&E Residential programs to 20 Residential/Low Income customers	9/24/2001	Completed
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## ATTACHMENT C

CARE Initiative (A)	Summary (B)	Timeline (C)	Status (D)
<b>Presentations</b>			
SMUD Affordable Housing Energy Cost	CARE, EP Financial Assistance Prog to 10 Affordable Housing Operators	9/27/2001	Completed
San Francisco Folsom Street Fair	CARE, LIEE, other PG&E Residential programs to 1000 Residential/Low income customers	9/29/2001	Completed
CARE Raffle Winners	CARE, EP, Financial Assistance Prog to 10 Low-Income Hispanic customers	9/28/2001	Completed
Congress of CA Seniors Education & Research Fund	CARE program guidelines, review of applications (res, sm, ag, np), Outreach program to 10 Senior citizens	10/3/2001	Completed
TEAM Coalition	CARE, EP, HR, Financial Assistance to 20 Low-Income, Seniors/Disabled customers	10/4/2001	Completed
Tri-City Sr. Coalition Fair	CARE, EP Financial Assistance to 30 Senior citizens	10/5/2001	Completed
Marysville/Yuba Retirees	Summer 2001: CARE, LIEE, HEAP, 1-2-3 Cashback, Outages and Blackouts to Seniors - Retired PG&E Employees	10/8/2001	Completed
Affordable Housing Conference SF Hilton Towers	CARE, EP to Affordable Housing Operators	10/9/2001	Completed
Yuba City Colgate retirees	CARE, LIEE, other PG&E programs to 80 Seniors, retirees	10/9/2001	Completed
El Cerrito SIRS club	CARE, LIEE, other PG&E programs to 90 Seniors, retirees	10/10/2001	Completed
Community Energy Forum Cherryland HOA-Senator Liz Figuero's Office	CARE, EP, HR, Financial Assistance - Winter Tips to 30 Low-Income, Seniors/Disabled customers	10/10/2001	Completed
Asian and Pacific Islanders with Disabilities	CARE, LIEE, 1-2-3 Cashback	10/19/2001	Completed
CARE Drive - San Jose Area	CARE sign ups/CARE program guidelines, review of applications (res, sm, ag, np), Outreach program to 500 Low-Income, Seniors/Disabled customers	10/20/2001	Completed
San Mateo Health Services	CARE, EP, HR, Financial Assistance - Winter Tips to 30 Low-Income, Seniors/Disabled customers	10/23/2001	Completed
Community Energy Forum Glad Tidings Community Campus-Sen. Liz Figuero's Office	CARE, EP, Financial Assistance - Winter Tips to 30 Low-Income, Seniors/Disabled customers	10/23/2001	Completed
PG&E Humboldt Chapter Retirees	Summer 2001: CARE, LIEE, HEAP, & 1-2-3 Cashback, Outages and Blackouts to Humboldt Seniors - Retired PG&E Employees	10/23/2001	Completed
Dia de los Muertos - Oakland	CARE Outreach program to 3000 Hispanic, Low-Income, Seniors/Disabled customers	10/28/2001	Completed
Senior Citizens Conference So. SF	CARE, EP, Financial Assistance, CARE Outreach to 600 Seniors	10/31/2001	Completed



CARE Initiative (A)	Summary (B)	Timeline (C)	Status (D)
<b>Presentations</b>			
EPA- Home Resource Fair	CARE, EP, Financial Assistance, CARE Outreach to 100 Hispanic, Low-Income, Seniors/Disabled customers	11/3/2001	Completed
Women's Club at St. Johns Church - San Lorenzo	CARE, EP Financial Assistance - Winter Tips to 45 Low - income, Seniors/Disabled customers	11/6/2001	Completed
CA Assoc. of Non-Profits	CARE, EP Financial Assistance, 1-2-3- Cashback to 500 Providers for Low-Income customers	11/8-9/01	Completed
CARE Drive - Salinas	CARE sign ups/CARE program guidelines, review of applications (res, sm, ag, np), Outreach program to 500 Hispanic, Low-Income, Seniors/Disabled customers	11/11/2001	Completed
West CC Senior Coalition Town Hall meeting	CARE, EP, Financial Assistance, CARE Outreach	11/14/2001	Completed
OCO Meeting	EP, CARE, Financial Assistance to 250 Low Income customers	11/15/2001	Completed
John 23rd Multi-Services Center	CARE, EP, 1-2-3 Cashback, medical baseline, Outage Safety to 60 Asian Seniors	11/29/2001	Completed
Sacramento Info Van	CARE, EP, Financial Assistance - Winter Tips to Low - income & Hard-To-Reach Seniors	12/4/2001	Completed
Network of Elders - Richmond	CARE, EP, Financial Assistance - Winter Tips to 45 Low - income, Seniors/Disabled customers	12/5/2001	Completed
San Mateo Senior Center	CARE, EP, Financial Assistance, CARE Outreach to 100 Hispanic, Low-Income, Seniors/Disabled customers	12/12/2001	Completed
Italian American Community Cntr. SF	Financial Assistance Programs, EP, CARE, Outages/Emergy Respns and Winter Tips to 25 Seniors	1/9/2002	Completed
SMUD Coalition	Financial Assistance Programs, EP, CARE to Care Providers for Sr. and Low-Income Customers	1/9/2002	Completed
California Foundation of Independent Living Centers Statewide Meeting (Disabled Community) Sacramento	Presentation on Financial Assistance Programs, EP, CARE. Shared outreach efforts we are doing to the disabled community. Obtained suggestions and recommendations from attendees on the programs, improving outreach to the disabled.	1/28/2002	Completed
Presentation to Widow/Widowers Club So. San Francisco	Financial Assistance Programs, EP, CARE to Care Providers for Sr. and Low-Income Customers	2/1/2002	Completed
Aster Park Sunnyvale	Financial Assistance Programs, EP, CARE, Outages/Emergy Respns and Winter Tips to 50 Seniors and Low-Income Customers (Vietnamese) HUD Housing	2/7/2002	Completed
Ginzton Terrace - Mtn. Vw.	Financial Assistance Programs, EP, CARE, Outages/Emergy Respns and Winter Tips to 35 Seniors (Russian) HUD Housing	2/11/2002	Completed
Homestead Park - Sunnyvale	Financial Assistance Programs, EP, CARE, Outages/Emergy Respns and Winter Tips to 50 Seniors and Low-Income Customers HUD Housing	2/11/2002	Completed



Abbreviations

CARE - California Alternate Rates for Energy

LIEE - Low Income Energy Efficiency Program

EP - Energy Partners (PG&E's LIEE Program)

SIRS - Sons in Retirement

RCP - Residential Contractor Program

CFL - Compact Fluorescent Light

HEAP - Home Energy Assistance Program (federal program)

REACH - PG&E bill assistance program administered by the Salvation Army

CARE Advertising Initiative (A)	Summary (B)	Timeline (C)	Status (D)
<b>Media Outreach</b>			
KTVU @ FLT's Home	Conservation Tips	1/28/2001	Completed
KVTO AM 1400 radio, "Community Hour" radio show	Energy crisis, low-income programs including CARE, LIEE, REACH, medical baseline, residential CEE programs and conservation effects for Bay Area Chinese-speaking audience	1/14/2001	Completed
KTSF, Ch26 TV, news interview	Safety measures during rolling blackout, CARE & LIEE for Bay Area Chinese-speaking audience	1/17/2001	Completed
Sing Tao AM1450 radio, "Consumer Action Hour" radio interview	Residential & small commercial energy efficiency programs, low-income CARE, LIEE, REACH, medical baseline for Bay Area Chinese-speaking audience	1/19/2001	Completed
KTSF Ch26 TV, news interview	Low income Programs: CARE, REACH and LIEE for Bay Area Chinese-speaking audience	1/25/2001	Completed
KTSF, Ch26 TV, news interview	CARE, REACH, LIEE & energy efficiency conservation tips for Bay Area Chinese-speaking audience	2/13/2001	Completed
Sing Tao AM1450 radio	CARE, REACH, LIEE & energy efficiency conservation tips for Bay Area Chinese-speaking audience	2/23/2001	Completed
KEST AM1450	CARE, REACH, LIEE, energy efficiency programs & conservation tips, SF Energy Fair for Bay Area Chinese-speaking audience	2/28/2001	Completed
KVTO AM 1400 radio	CARE, REACH, LIEE, energy efficiency programs & conservation tips, SF Energy Fair for Bay Area Chinese-speaking audience	3/1/2001	Completed
KEST AM1450	CARE, LIEE, REACH, HEAP, 1-2-3 Cashback, current appliance rebates, CFL rebates, RCP for Bay Area Chinese-speaking audience	4/2/2001	Completed
KTSF, Ch26 TV, Chinese Journal	CARE income guidelines, LIEE, REACH for Bay Area Chinese-speaking audience	4/4/2001	Completed
KTSF Ch 26 News	REACH, appliance rebates, CARE program, & income guidelines for Bay Area Chinese speaking audience	4/10/2001	Completed
Sing Tao Radio	CARE, LIEE, REACH, HEAP, 1-2-3 Cashback, current appliance rebates, CFL rebates, RCP for Bay Area Chinese speaking audience	4/18/2001	Completed
NY Times story ride-along Fresno	LIEE, CARE media re Low-Income programs	5/10/2001	Completed
Channel 21 - Fresno Ride-along	CARE, LIEE targeted to Low-Income Hispanic customers	5/18/2001	Completed
PG&E CARE Advertising Campaign	Participated in PG&E advertising campaign to promote energy saving tips and CARE awareness in various newspapers during June 2001.	June 2001	Completed
Santa Cruz Sentinel Paper Article	Energy Partners/LIEE Low-Income, Seniors/Disabled customers	7/5/2001	Completed
KVTO AM 1400 radio, "Community Hour" radio show	CARE, LIEE, HEAP, & 1-2-3 Cashback, to Bay Area Chinese speaking audience	7/22/2001	Completed

CARE Advertising Initiative (A)	Summary (B)	Timeline (C)	Status (D)
<b>Media Outreach</b>			
Spanish Television ride-along	CARE, LIEE to Modesto Low-Income, Seniors/Disabled customers	8/1/2001	Completed
Spanish Radio	CARE, LIEE, RCP & 1-2-3 Cashback to Bakersfield/Modesto/Fresno/Stockton area Hispanic, Low-Income, Seniors, Disabled customers	7/30-8/3/01	Completed
Spanish Television ride-along Dixon	CARE, LIEE to Dixon Low-Income, Seniors/Disabled customers	8/9/2001	Completed
KPST - interview (Mandarin)	CARE and LIEE to Bay Area Low-Income, Seniors/Disabled Mandarin Pop.	8/23/2001	Completed
KSOL - interview (Hispanic)	CARE, EP, Financial Assistance Prog to Bay Area Low-Income, Seniors/Disabled, Hispanic customers	8/26/2001	Completed
CARE Rapid Deployment Campaign	CARE Advertising Campaign Media Kick-off event in Oakland	23-Aug-01	Completed
CARE Program Internet Sub-Site	All applications and information regarding the current CARE programs, including information in Spanish, Chinese and Vietnamese, are available electronically at <a href="http://www.pge.com/care">www.pge.com/care</a> . Information regarding the SBX1 5 Capitation project is also posted on the site.	Aug-01	On-Going
CARE Toll-Free Line	PG&E launched a new information toll-free line for customers, 1-866-PGE-CARE. The line provides in-depth information about CARE to callers in five languages (Cantonese, English, Mandarin, Spanish and Vietnamese). Beginning September 2001, the line will also provide callers with local community organizations that can provide application assistance.	Aug-01	On-Going
CARE Campaign Launch	PG&E hosted a CARE launch event in the Fruitvale district in Oakland, CA, to announce the launch of an aggressive grassroots outreach and education effort. Numerous community outreach contractors attended as did eligible families and public officials. The event also was covered by 10 media outlets, all from the ethnic media in the Bay Area.	Aug-01	Completed
CARE Educational Materials	PG&E introduced a new CARE outreach brochure and table top display to COCs and community leaders. The colorful brochures provide information in four languages (Chinese, English, Spanish and Vietnamese) and encourage readers to call CARE's new toll-free line 1-866-PGE-CARE. Brochures were shipped to COCs, pay stations and elected officials across the service territory to distribute to the community.	Aug. 23	On-Going
CARE Brochure Distribution	To reach rural communities and hard-to-find urban dwellers, PG&E distributes CARE 750,000 brochures through Laundromats, gas stations, check cashing stations and other locations where low-income customers visit.	September-December 15	On-Going

CARE Advertising Initiative (A)	Summary (B)	Timeline (C)	Status (D)
<b>Media Outreach</b>			
CARE Media Partnerships in the Bay Area	As a part of the aggressive new grassroots campaign, PG&E entered into radio partnerships with KISS-FM in San Francisco and KSOL FM in San Jose. KISS FM reaches a strong cross section of African American and Latino listeners, many of whom are eligible for CARE. KSOL is one of the top Spanish-language stations in the market. As a part of the partnership, both stations attended the CARE launch event in Oakland.	Aug 15-30	Completed
CARE Media Partnership in Fresno	As a part of the aggressive new grassroots campaign, PG&E entered into a media partnership KFTV/Channel 21 in Fresno to reach the large Spanish-language market in the Central Valley. KFTV is the Univision affiliate serving California's Central Valley. As a part of the partnership, the station agreed to proceed and air public service announcements educating consumers on CARE. Additionally, the station is airing news features through December on the CARE program. KFTV is the No. 1 rated station in the Central Valley.	Aug-21-Dec-15	On-Going
Spanish-Language Insert Media Relations	As part of its grassroots media outreach efforts, PG&E is distributing 2.7 million applications in 11 Hispanic newspapers in Bakersfield, Fresno, Visalia, Sacramento, Stockton, Modesto, San Francisco, San Jose and Oakland. To promote awareness among newspaper readers, PG&E distributed news releases to weekly newspapers and Spanish-language radio stations announcing the pending distribution.	18-Sep	Completed
Spanish-language Radio Advertising	As part of its grassroots media outreach, PG&E CARE advertising aired on Spanish-language radio stations in San Francisco, Oakland, San Jose, Fresno, Visalia, Bakersfield, Stockton and Modesto.	September-December 15	On-Going
Chinese, Vietnamese Advertising	As part of its grassroots media outreach, PG&E CARE print advertisements appeared in Chinese and Vietnamese newspapers across its service territory.	September-December 15	On-Going
News Feature Airs in Fresno	KFTV-Channel 21, the Univision affiliate in Fresno, aired a news feature on CARE.	September	Completed
Photo and Caption Distribution	As part of its grassroots media outreach, PG&E distributed dozens of photos and captions highlighting CARE contractors to African American newspapers.	September	Completed
Spanish-language Applications Inserts	As part of its grassroots media outreach efforts, PG&E is distributing 2.7 million applications in 11 Hispanic newspapers in Bakersfield, Fresno, Visalia, Sacramento, Stockton, Modesto, San Francisco, San Jose and Oakland.	September-December 15	On-Goring

CARE Advertising Initiative (A)	Summary (B)	Timeline (C)	Status (D)
<b>Media Outreach</b>			
Kmart Agrees To Corporate Partnership	The Kmart Corporation agreed to support PG&E's CARE outreach campaign by hosting enrollment events at its Super Kmart store in San Jose and Salinas. In addition, Kmart agreed to distribute CARE educational materials to its customers at these stores.	September	On-Going
CARE News Feature Airs in Amador County	TSPN-TV in Jackson, CA (Amador County) aired a news feature on the CARE program interviewing PG&E representative Carey Madill.	24-Sep	Completed
English Outdoor Advertising	As part of its grassroots media outreach efforts, PG&E launched English outdoor advertising in low-income neighborhoods in Chico, Redding, Monterey, Salinas, Sacramento, Stockton, Modesto, San Francisco, Oakland, San Jose, Eureka and San Luis Obispo	September-December 15	On-Going
CARE Applications in October Bill	PG&E distributes 4.7 million CARE applications in a special October bill insert to all its customers. PG&E created a special, multilingual envelope for the mailing, asking customers in four languages if they want to save \$20 on their PG&E bill.	October	On-Going
CARE News feature Airs in Santa Rosa	A CARE news feature aired on KFTY-50 in Santa Rosa during the 7, 10 and 11 p.m. newscasts informing viewers of the number of PG&E customers eligible for CARE's 20 percent discount.	1-Oct	Completed
CARE News feature Airs in Chico-Redding	A CARE news feature aired on KHLS-12 during the 11 p.m. newscasts informing viewers of the number of PG&E customers eligible for CARE's 20 percent discount.	1-Oct	Completed
Second CARE News feature Airs in Chico-Redding	A CARE news feature aired on KHLS-12 during the 6:30 a.m. newscasts informing viewers of the number of PG&E customers eligible for CARE's 20 percent discount.	2-Oct	Completed
CARE News feature Airs in Bakersfield	A CARE news feature aired on KBAK-17 in Bakersfield on the 5 p.m. newscasts informing viewers of the number of PG&E customers eligible for CARE's 20 percent discount.	2-Oct	Completed
CARE News Feature Re-air in Chico-Redding	The CARE news feature re-aired on KHLS-12 during the 6:30 and 11 p.m. newscasts informing viewers of the number of PG&E customers eligible for CARE's 20 percent discount.	5-Oct	Completed
Antelope Valley Edition of the LA Bay News Observer	CARE Day photo and captions featuring Black Women Organized are printed in the Sacramento Observer, the largest African American paper in the region.	5-Oct	Completed
VNFM Radio	VNFM Radio, a Vietnamese radio station that broadcasts in San Jose, aired numerous public service announcements to promote CARE Day in San Jose.	October 15-20	Completed
Radio Seoul	Radio Seoul, the Korean radio network, aired a news story promoting CARE Day in San Jose.	15-Oct	Completed

CARE Advertising Initiative (A)	Summary (B)	Timeline (C)	Status (D)
<b>Media Outreach</b>			
CARE Day Partnership Begins KSOL-FM in San Jose	As a part of the aggressive grassroots campaign, PG&E entered into a media partnership KSOL in San Jose to encourage CARE eligible customers to attend CARE Day in San Jose. The station is promoting the event for 10 days and will attend the event to promote enrollment.	October 9-20	Completed
CARE Day Partnership Begins KSTS-TV Channel 48 in San Jose	As a part of the aggressive grassroots campaign, PG&E entered into a media partnership KSTS-TV, the Telemundo affiliate in San Jose to encourage CARE eligible customers to attend CARE Day in San Jose. The station is promoting the event for 10 days and will attend the event to promote enrollment.	October 13-20	On-Going
CARE Day Event Fliers	To promote CARE Day in San Jose, PG&E distributed 10,000 fliers in English, Spanish and Vietnamese to Kmart, pay stations, elected officials and organizations in the San Jose area.	10-Oct	Completed
Sacramento Observer	CARE Day photo and captions featuring Black Women Organized are printed in the Sacramento Observer, the largest African American paper in the region.	18-Oct	Completed
CARE Day in San Jose	To enhance enrollment efforts among San Jose large Latino and Vietnamese communities, PG&E hosts CARE Day in San Jose in conjunction with Super Kmart, KSOL radio and Telemundo Television.	20-Oct	On-Going
Media Partnership with KLOK in San Jose	KLOK is a sponsor of a major Hispanic festival called Dia de los Muertos, which attracts 70,000 visitors each year. To enroll folks in CARE during the event, PG&E has signed on as a sponsor. In addition, as part of a sponsorship agreement with KLOK PG&E is encouraging customers to bring their PG&E bill to the event so they can sign up on the spot.	October 22-28	On-Going
Asian Newspaper Coverage	A number of Asian newspapers covered CARE Day in San Jose, including the Sing Tao Daily, a leading Chinese newspaper; Korean Central Daily, International Daily News, Chinese Times and Thoi Boa (Vietnamese).	22-Oct	Completed
Hmong, Chinese and Vietnamese Flier Distribution	PG&E distributed 5,000 Hmong, Chinese and Vietnamese CARE information fliers to CARE contractors to enhance outreach efforts to these populations. Additionally, all COCs received camera-ready PDF files so they can reprint the fliers as needed.	October	Completed
CARE Day in San Jose News Releases Distributed	In an effort to increase enrollment at CARE Day in San Jose, PG&E distributed news releases announcing the event to English, Spanish, Vietnamese and Chinese media outlets in the San Jose area.	October 10-20	On-Going
CARE Day in Salinas	To enhance enrollment efforts among Salinas large Spanish and English communities, PG&E will host CARE Day in San Jose in conjunction with Kmart, KLOK radio and Univision Television.	11-Nov	On-Going

CARE Advertising Initiative (A)	Summary (B)	Timeline (C)	Status (D)
<b>Media Outreach</b>			
CARE Media Outreach	Schedule media interviews for PG&E representatives with the Asian media to heighten awareness about the CARE Program.	October	On-Going
CARE Day in San Jose	Provide translation of the media advisory in Asian languages about the CARE Program sign-up event at KMART in San Jose.	October	Completed
Radio Bilingue	Liz Gomez, PG&E's Fresno representative, interviewed on Radio Bilingue for 45 minutes on the CARE program.	24-Oct	Completed
Chico Television	Chico Television station KRCR/Channel 7 ran a report on the CARE program in response to PG&E's media outreach efforts.	19-Oct	Completed
Telemundo/San Jose	KSTS-TV, the San Jose Telemundo affiliate, airs public service announcements to promote CARE Day in San Jose.	October 12-19	Completed
KSOL Media Partnership	KSOL, the No. 1 rated Spanish-language radio station in the Bay Area, airs public service announcements to promote CARE Day in San Jose.	October 12-19	Completed
KLOK Media Partnership	KLOK, a major Hispanic festival called Dia de los Muertos, agrees to promote CARE enrollment during the event through a sponsorship agreement.	October 23-28	Completed
Telemundo Interview	KSTS-TV, the San Jose Telemundo affiliate, airs a news feature interview with Claudia Mendoza of PGE to promote CARE Day in San Jose.	19-Oct	Completed
Afro-Centric Collateral Materials	PG&E distributes Afro-Centro collateral materials to assist the CARE contractors in its outreach efforts, including 5,000 church fans, 1,500 posters and 15,000 bookmarks.	October-November	Completed
KFTV-Fresno	Claudia Mendoza of PG&E promotes CARE program during an interview on KFTV's Arriba Valle Central show in Fresno.	7-Nov	Completed
KGST Radio in Fresno	Claudia Mendoza of PG&E promotes CARE program during an interview on KGST's La Mexicana show. She answers calls from listeners during the program. The show is rebroadcast on KLBN "La Buena" and KMMM "Radio Amor" on November 11.	6-Nov	Completed
Radio Bilingue	Radio Bilingue translated a PSA to air on its Hmong broadcast.	November	On-going
Bakersfield's Spanish Radio Interviews	KWAC "La Consentida", KIWI's "Radio Lobo", and KCHJ's "El Gallito" interview Claudia Mendoza live on the air about the CARE program. Numerous listeners called into to ask questions.	7-Nov	Completed
KABE-TV in Bakersfield	Claudia Mendoza interviews on KABE/Channel 39, the Bakersfield Univision station on "Bakersfield al Dia."	10-Nov	Completed
KPSL Radio in Bakersfield	Claudia Mendoza interviews on KPSL's "Power" to promote CARE program.	11-Nov	Completed



CARE Advertising Initiative (A)	Summary (B)	Timeline (C)	Status (D)
<b>Media Outreach</b>			
The California	The California, the Salinas daily paper, runs a story on CARE Day in Salinas.	8-Nov	Completed
KLOK Media Partnership	KLOK joins the CARE campaign as a media sponsor promoting CARE Day in Salinas.	Nov. 5-11	Completed
KSMS/Univision Media Partnership	KSMS/Univision in Monterey joins the CARE campaign as a media partner airing public service announcements to promote the CARE campaign. The PSA's feature veteran anchor Fidel Soto.	Nov. 7-10	Completed
KTXS in Salinas	PG&E's Jeff Smith interviews on KTXS in Salinas to promote CARE Day in Salinas and discuss energy efficiency.	6-Nov	Completed
KLOK in Salinas	Claudia Mendoza is interviewed on KLOK in Salinas to promote enrollment at CARE Day in Salinas.	9-Nov	Completed
KSMS/Univision in Monterey	Claudia Mendoza is interviewed on KSMS/Univision in Monterey to promote enrollment at CARE Day in Salinas.	9-Nov	Completed
Fox Television/Monterey	Fox Television in Monterey attends CARE Day in Salinas to cover PG&E's successful enrollment efforts.	11-Nov	Completed
KSBW-TV in Salinas	KSBW-TV in Salinas covers PG&E's CARE Day in Salinas.	11-Nov	Completed
African American Newspaper Advertising	PG&E places advertisements numerous African American community papers, including Post Newspaper Group (Oakland, Berkeley, Richmond, San Francisco), Sun Reporter News Group (San Francisco, San Jose, Vallejo, Berkeley, Richmond), The California Advocate (Fresno and the Central Valley), Bakersfield Observer (Bakersfield).	November-December	On-Going
Soul Beat	PG&E places advertising on Soul Beat, KSBT-TV Channel 27 in the East Bay. Soul Beat has a large African American audience.	November-December	On-Going
KIDE-FM Media Partnership	KIDE-FM in Eureka, the first Native American owned radio station in the United States, agrees to join the CARE campaign as a media partner.	November	On-Going
Sears Signs on As Corporate Partner	Bay Area Sears stores agree to support PG&E's CARE program as a corporate partner. Sears will host a CARE Day at Bay Area Sears stores on December 1	November	On-Going
News Releases Promoting CARE Contractors	PG&E distributes 10 news releases to African American newspapers promoting local CARE contractors enrolling customers in CARE.	November	Completed
San Francisco Chronicle	The San Francisco Chronicle writes an article on the CARE program and the availability of CARE dollars to PG&E customers.	26-Nov	Completed
Announcer Ready Scripts	PG&E distributes announcer-ready public service scripts to African American radio stations across its service territory.	November	Completed



CARE Advertising Initiative (A)	Summary (B)	Timeline (C)	Status (D)
<b>Media Outreach</b>			
Five-language promotion for CARE Day at Sears Radio/TV Promotions	In an effort to increase enrollment at CARE Day at Sears in the Bay Area, PG&E promotes CARE information on 13 radio stations and one television station, Univision, the No. 1 rated Spanish-language station in the market. The English radio stations include: KABL, KBLX, KYLD, KMEL and KFRC-FM/AM. The Spanish radio stations included: KSOL/KZOL, KBRG and KLOK. The Cantonese stations included: KVTO, KEST. The Mandarin stations included: KSQQ and KSJX. The Vietnamese stations included: VNFM, Radio San Jose, and Saigon Radio Hai Ngoai.	November-December	Completed
CARE Day at Sears Newspaper Coverage	In an effort to expand outreach opportunities for CARE Day at Sears, PG&E does extensive media outreach opportunities in the Bay Area. The Oakland Tribune and Sing Tao Daily write articles on the CARE program and the Sears outreach event.	November-December	Completed
CARE Day at Sears Radio Coverage	KCBS Radio in San Francisco, KABL and KSRO air CARE Day at Sears stories.	30-Nov	Completed
CARE Day at Sears Television Coverage	Univision, the No. 1 rated Spanish-language station in the Bay Area, aired a story on PG&E's CARE Day outreach effort at eight Bay Area Sears stores. The piece aired on the 6 and 11 p.m. news broadcasts.	30-Nov	Completed
Holiday Media Outreach	As a part of the outreach efforts, the Alameda County Community Food Bank distributes CARE materials to Bay Area families. To promote this important effort and educate customers, the Food Bank and PG&E are distributing news releases to media outlets across the Bay area.	December	On-Going
Radio Bilingue Partnership	In an effort to reach eligible customers in the Central Valley, particularly agricultural workers, PG&E signs a media partnership with Radio Bilingue, the non-profit Spanish-radio network.	December	Jan.-Mar. 2002
KVTO Radio Interview	Laura Chiu of PG&E interviewed re. CARE, EP, 1-2-3 Cashback, Outage Safety, Conservation Tips in Bay Area Chinese language radio interview	12/3/2001	Completed
SF Spanish TV Interview - Ch.14	Presentation of EP pre-inspection process, incl CAS	12/26/2001	Completed
Radio Bilingue	Claudia Mendoza of PG&E interviewed on the Radio Bilingue network discussing the benefits of the CARE program. The interview was translated into Miztec.	26-Dec	Completed

CARE Advertising Initiative (A)	Summary (B)	Timeline (C)	Status (D)
<b>Media Outreach</b>			
Kwanzaa Media Coverage	In conducting an enrollment in conjunction with Soul Beat Cable TV in Oakland, PG&E received television, radio and newspaper coverage, including: KRON-4, KBWB-20, KMEL (radio). Soul Beat also broadcast a 2 1/2 hours of public affairs time on Friday, December 28 and 1 1/2 hours of live on air time and a public affairs interview and presentation of the proclamation from Councilman Moses Mayne, Jr.	December 29-30	Completed
KE Buena	To reach the Spanish-language audience in Sacramento, Claudia Mendoza was interviewed on KE Buena.	10-Jan	Completed
Radio Bilingue	Claudia Mendoza of PG&E was interviewed on the Radio Bilingue network, where she discussed the benefits of the CARE program.	16-Jan	Completed
Napa Valley, Solano County Interviews	Claudia Mendoza of PG&E was interviewed on La Vaqueria (KSQR). The interview will be broadcast in the Napa Valley and Solano County.	20-Jan	Completed
CARE Enrollment Events Media Coverage	PG&E generated extensive media coverage for its enrollment events on the Central Coast in February, including television coverage on KTAS-TV, the local Telemundo affiliate, KSBY-TV, the local NBC affiliate. Newspaper coverage included an article in SLO's Tribune, New City and the Santa Maria Sun. Claudia Mendoza also interviewed on four Santa Maria area radio stations to promote the CARE enrollment events: KTAP-AM, KLMM-FM, KSBQ-AM, KLUN-FM,.	January-February	Completed

#### Abbreviations

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EP - Energy Partners (PG&E's LIEE Program)

SIRS - Sons in Retirement

RCP - Residential Contractor Program

CFL - Compact Fluorescent Light

HEAP - Home Energy Assistance Program (federal program)

REACH - PG&E bill assistance program administered by the Salvation Army



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