

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

Application of Southern California Edison  
Company (U338E) for Approval of its 2012-  
2014 California Alternate Rates for Energy  
(CARE) and Energy Savings Assistance  
Programs and Budgets.

And Related Matters.

Application 11-05-017  
(Filed May 16, 2011)

Application 11-05-018  
Application 11-05-019  
Application 11-05-020

**ANNUAL REPORT OF PACIFIC GAS AND ELECTRIC COMPANY (U 39 M) ON THE  
RESULTS OF ITS ENERGY SAVINGS ASSISTANCE AND CALIFORNIA  
ALTERNATE RATES FOR ENERGY PROGRAMS**

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Dated: May 1, 2015

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RESULTS OF ITS ENERGY SAVINGS ASSISTANCE AND CALIFORNIA  
ALTERNATE RATES FOR ENERGY PROGRAMS**

In accordance with Decision 12-08-044, and the annual reporting directives contained therein, Pacific Gas and Electric Company files this Annual Report on the results of its Energy Savings Assistance and California Alternative Rates for Energy program efforts for the 2014 program year.

Respectfully submitted,

DARREN P. ROACH

By: \_\_\_\_\_/s/  
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Dated: May 1, 2015



# PACIFIC GAS AND ELECTRIC COMPANY

## Energy Savings Assistance (ESA) Program and California Alternate Rates for Energy

Program Annual Report  
For Program Year 2014

May 01, 2015

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### Energy Savings Assistance Program and CARE Program 2014 Summary Highlights

The tables below provide a summary of PY2014 ESA and CARE Program expenditures and activities.

#### ESA Program

2014 Energy Savings Assistance Program Summary			
2014	Authorized / Planning Assumptions	Actual	%
Budget <sup>1</sup>	\$166,669,284	\$145,940,449	88%
Homes Treated	119,940	123,539	103%
kWh Saved		43,073,444	
kW Demand Reduced		8,270	
Therms Saved		1,940,815	

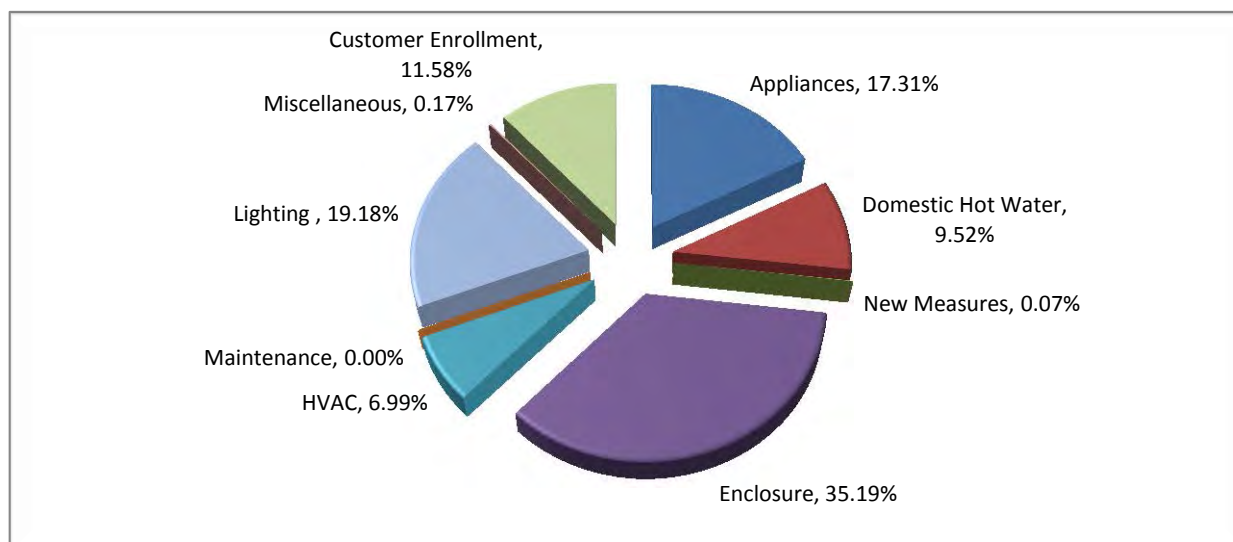
<sup>1</sup>The authorized budget and actuals include employee benefit costs approved in the GRC D.14-08-032 and the 2009-2011 carry-forward amount of \$2,849,505 shown in ESA Table 12: Fund Shifting.

#### CARE Program

2014 CARE Program Summary			
2014	Authorized Budget	Actual	%
Administrative Expenses <sup>1</sup>	\$15,790,513	\$12,281,846	78%
Subsidies and Benefits	\$605,950,000	\$607,206,765	100%
<b>Total Program Costs and Discounts</b>	<b>\$621,740,513</b>	<b>\$619,488,611</b>	<b>100%</b>
<b>2014 CARE New Enrollments</b>	<b>Automatically Enrolled via Data Sharing, ESA Participation, etc.</b>	<b>Self Certified as Categorically Eligible</b>	<b>Self Certified as Income Eligible</b>
Method	31,515	80,472	233,796
<b>2014 CARE Penetration</b>	<b>Estimated Eligible Participants</b>	<b>Participants</b>	<b>Penetration Rate</b>
Total Enrolled	1,648,774	1,413,334	86%

<sup>1</sup>The administrative budget and expenses include employee benefit costs approved in the GRC D.14-08-032.

#### PY2014 ESA Expenditures By Measure Group



## ENERGY SAVINGS ASSISTANCE PROGRAM

### 1. Energy Savings Assistance (ESA) Program

Pacific Gas and Electric Company (PG&E or the Company) has offered free energy efficiency programs to income-qualified customers in its 48 counties since 1983. The ESA Program's objective is to help income-qualified customers reduce their energy consumption and costs while increasing their comfort, health and safety. The ESA Program, formerly known statewide as the Low Income Energy Efficiency (LIEE) program and marketed to PG&E customers prior to 2011 as Energy Partners,<sup>1</sup> utilizes a prescriptive, direct install approach to provide free home weatherization, energy efficient appliances and energy education services to income-qualified PG&E customers throughout the Company's service area.

The ESA Program is ratepayer-funded and is available to PG&E customers living in all housing types (single family, multifamily, and mobile homes), regardless of whether they are homeowners or renters. To qualify for the ESA Program, the total customer household income must be equal to or less than 200 percent of the Federal Poverty Guidelines, with income adjustments for family size. The 2014 ESA Program treated 123,539 homes with a mix of measures and services, including energy education, energy efficient appliances, and home weatherization.

Authorization for the 2014 ESA Program is pursuant to California Public Utilities Commission (CPUC or Commission) Decision (D.) 12-08-044, issued on August 30, 2012, adopting the 2012-2014 ESA Program and budget, and General Rate Case (GRC) D.14-08-032, issued on August 20, 2014, authorizing the allocation of employee benefits to the respective Customer Program balancing accounts. The budget authorized in D.12-08-044 and D.14-08-032 for the 2014 ESA program and activities was \$163,819,779, and was adjusted in 2014 to include the 2009-2011 carry-forward amount of \$2,849,505 (see ESA Table 12 Fund Shifting). The 2014 adjusted authorized budget is \$166,669,284.

D.12-08-044 ordered PG&E to achieve a goal of treating 359,820 customers in its ESA Program between 2012 and 2014. PG&E exceeded that goal, treating a total of 362,334 customers during this program cycle.

**PG&E 2012-2014 ESA Goals**

	Goal	Treated	%
<b>2012</b>	119,940	115,229	96%
<b>2013</b>	119,940	123,566	103%
<b>2014</b>	119,940	123,539	103%
<b>Total</b>	<b>359,820</b>	<b>362,334</b>	<b>101%</b>

PG&E began to implement the 2012-2014 program authorized in D.12-08-044 in October, 2012. PG&E worked with the CPUC Energy Division (ED) to create this current annual reporting template to more completely capture all of the reporting requirements of D.12-08-044.

D.12-08-044 resulted in various measures being dropped and added to the 2012-2014 ESA Program. For example, central and room air conditioning (AC) were dropped in some climate zones, while microwaves, shower starts, and AC fan delays were added for this program cycle.

<sup>1</sup> D.08-11-031 and D.09-10-012 mandated that PG&E and the other investor-owned utilities develop a new statewide name and brand identity for the LIEE program. The investor-owned utilities (IOU) worked with Energy Division (ED) to develop a new statewide name during 2010, the Energy Savings Assistance Program. This name was implemented in 2011.

### 1.1. Alignment of ESA Program with Strategic Plan Goals and Strategy

The long-term California Strategic Plan vision for the ESA Program is to have 100 percent of all eligible and willing low-income customers receive all cost effective ESA Program measures by 2020. The California Strategic Plan lays out two goals in achieving the ESA Program vision: (1) by 2020, all eligible customers will be given the opportunity to participate in the ESA Program; and (2) the ESA Program will be an energy resource by delivering increasingly cost-effective and longer-term savings.

#### 1.1.1. Please identify the IOU strategies employed in meeting

##### Goal 1: Improve Customer Outreach

Implementation Plan and Timeline		
Strategies	Mid Term 2012-2015	IOU Strategy Employed This Program Year
1.1.1. a) Strengthen ESA Program outreach using segmentation analysis and social marketing tools.	Implement energy education designed to help customers understand and change behaviors in ways that support ESA savings.	<p>In 2013, PG&amp;E participated with SCE, SCG and SDG&amp;E in a Joint IOU Energy Education Study to identify ways to optimize and/or improve the educational component of the ESA Program concerning: (1) how energy education is provided, and (2) what materials and content are provided. These findings are being used to enhance energy education currently offered in ESA and to design more effective energy education for the 2015-2017 ESA Program Application. This Study is discussed further in Section 1.10.</p> <p>In 2014, PG&amp;E launched multi-touch acquisition campaigns that included direct mail, email and automated voice messaging, targeting customers with a high propensity for eligibility.</p> <p>Additionally PG&amp;E expanded its outreach to include channels such as: digital and social media, paid and earned media, community events and bill inserts. These channels targeted low income customers with an emphasis on those who speak Spanish and Chinese.</p>

Implementation Plan and Timeline		
Strategies	Mid Term 2012-2015	IOU Strategy Employed This Program Year
<b>1.1.1. b)</b> Develop a recognizable and trustworthy Brand/Tagline for the ESA Program.	Launch integrated EE/ESA/DSM brand.	PG&E worked closely with Energy Division and the other IOUs to finalize and launch a statewide program name and description for LIEE, the “Energy Savings Assistance Program.” This new name was launched in 2011 and continued to be used in all 2014 program communications and marketing.
<b>1.1.1. c)</b> Improve program delivery	<p>Use information from segmentation analysis to achieve efficiencies in program delivery.</p> <p>Leverage with local, state, and federal agencies as well as other organizations to increase seamless coordination, efficiency and enrollment.</p>	<p>PG&amp;E’s Household Market Segmentation study was finalized in 2012 and findings continued to be used in 2014. PG&amp;E also conducted additional segmentation analysis to supplement these findings. The information gained from this study and additional PG&amp;E research greatly improved the ESA Program’s outreach team’s ability to develop a more fine-tuned strategy, centered on being local and relevant to specific customer segments.</p> <p>The ESA Program outreach team leveraged various local government and community organizations’ programs and knowledge of their communities to promote the ESA Program and enroll customers.</p> <p>PG&amp;E participated with California Department of Community Services and Development (CSD) in several pilots, including: bulk purchasing, solar water heating and geographic coordination.</p>



Implementation Plan and Timeline		
Strategies	Mid Term 2012-2015	IOU Strategy Employed This Program Year
<b>1.1.1. d)</b> Promote the growth of a trained ESA Program workforce.	<p>Implement ESA workforce education and training.</p> <p>Coordinate resources for training related to ESA program needs to ensure delivery of ESA-trained resources to the program.</p>	<p>In 2014, PG&amp;E ESA Program staff participated in the Statewide WE&amp;T Team's efforts and continued development of a comprehensive workforce education and training guidance plan.</p> <p>PG&amp;E met with our contractors to discuss and evaluate ESA workforce data (gathered from contractors and reported by the IOUs in 2013), and developed recommendations pertaining to collecting and tracking demographic data.</p>

**1.1.2. Please identify the IOU strategies employed in meeting**

**Goal 2: ESA Program Is an Energy Resource**

Implementation Plan and Timeline		
Strategies	Mid Term 2012-2015	IOU Strategy Employed This Program Year
<b>1.1.2. a)</b> Increase collaboration and leveraging of other low income programs and services	Continue to expand partnerships with stakeholders and seek new opportunities for data sharing.	<p>As part of Residential Rate education campaign efforts, the ESA Program partnered with other community based organizations and PG&amp;E programs to participate in strategic community events.</p> <p>In 2014, PG&amp;E worked cooperatively with the other IOUs to put together a single Property Owner Waiver for ESA contractors to use in overlapping territories to make it easier for rental customers to leverage ESA program participation.</p>
<b>1.1.2. b)</b> Coordinate and communicate between ESA Program, energy efficiency and Demand-Side Management (DSM) programs to achieve service offerings that are	Continually reevaluate and update programs to take advantage of new technologies. Explore in-home displays; home area networks and/or "pay-as-you-go" technology to assist low income customers manage their	PG&E used an "Integration" team comprised of staff from its Energy Efficiency (EE) and the ESA Programs, as well as staff from Demand Response (DR) and Distributed Generation programs—which include the CSI

Implementation Plan and Timeline		
Strategies	Mid Term 2012-2015	IOU Strategy Employed This Program Year
seamless for the customer.	use.	<p>and Self-Generation Incentive Program—to provide marketing and integrated service and delivery.</p> <p>This team works to evaluate and consider new measures and technologies as they become available and feasible for inclusion in the ESA Program. The ESA Program design team is currently considering what new technologies may be ripe for inclusion in the 2015-2017 ESA Program. For example, in 2014 the ESA Program team started working with the EE Home Area Network (HAN) team so ESA can incorporate it into our Enhanced Energy Education for 2015.</p> <p>PG&amp;E continued distributing an integrated customer assistance program brochure in multiple languages in 2014 and began work on a similar brochure dedicated to Integrated Demand-Side Management programs.</p>
<b>1.1.2. c)</b> Provide low income customers with measures that result in the most savings in the ESA Program.	Assess opportunities to incorporate new energy efficiency measures into the ESA Program, e.g., plug-load reduction, new HVAC technology.	<p>PG&amp;E's 2014 ESA Program implemented the most cost-effective measures as described in our 2012-2014 Application.</p> <p>PG&amp;E continued to explore and assess new energy efficiency measures for inclusion in its 2015-2017 ESA Program Application.</p>
<b>1.1.2. d)</b> Increase delivery of efficiency programs by identifying segmented concentrations of customers.	Evaluate approach to determine whether additional segments are needed.	PG&E incorporated the findings of the Household Market Segmentation study finalized in 2012. PG&E enhanced these findings with findings from additional segmentation analysis conducted in-house as we continued to evaluate the

Implementation Plan and Timeline		
Strategies	Mid Term 2012-2015	IOU Strategy Employed This Program Year
		<p>effectiveness of our segmentation and targeting approach throughout 2014.</p> <p>PG&amp;E provided targeted referral lists to our subcontractors to help them locate and target areas with high poverty demographics. Additionally, PG&amp;E managed automated outbound voice, text messaging and direct mail campaigns in areas where customers were likely to qualify for the program.</p>

## 1.2. Energy Savings Assistance Program Overview

### 1.2.1. Provide a summary of the Energy Savings Assistance Program elements as approved in D.12-08-044:

PY 2014 ESA Program Summary			
	Authorized/Planning Assumptions	Actual	%
Budget	\$166,669,284	\$145,940,449	88%
Homes Treated	119,940	123,539	103%
kWh Saved	NA	43,073,444	N/A
kW Demand Reduced	NA	8,270	N/A
Therms Saved	NA	1,940,815	N/A

## 1.3. Marketing, Education and Outreach

PG&E identified and targeted neighborhoods with large populations of low income customers, usually by utilizing ZIP-7 boundaries. Program staff also used census tract information or even more uniquely defined areas when working with a local government or community agency.

PG&E identified which areas were most likely to result in a high volume of enrollments and provided these to the implementation contractors on a regular basis via emails and monthly meetings. PG&E also broke out ZIP-7 areas eligible for “self-certification” enrollment (by having over 80 percent of households living at or below 200 percent of the Federal Poverty Guideline Level) so they could be specifically targeted by ESA Program contractors. Most implementation contractors then arranged their appointments geographically to minimize costs and typically worked through their assigned areas geographically for the same reason.

## 2014 ESA Outreach Campaign Activity Highlights

PG&E continued to conduct and build upon marketing education and outreach efforts authorized in D.12-08-044.<sup>2</sup>

In 2014, PG&E's ESA Program built on its integrated marketing strategy by focusing on the central valley. PG&E's 2014 campaign included a variety of outreach channels: direct mail, call/text messaging, web, media, events, and door-to-door canvassing. PG&E's direct mail projects targeted eligible households already enrolled in CARE and complemented these efforts with automated phone calls and text messaging. PG&E also encouraged ESA Program contractors to conduct their own door-to-door canvassing and outreach. Additionally, PG&E employed both ethnic and general media to build program awareness and used existing strategic partnerships to identify populations in need of assistance, specifically among Spanish-speaking customers and agricultural customers.

In 2014, PG&E worked closely with Richard Heath and Associates (RHA), PG&E's ESA Program Administrator, to continue a "Warm Transfer" outreach method, enhancing targeting and outreach efforts to streamline the enrollment and treatment process for qualified customers. The following sections provide a description of the Warm Transfer outreach method and the various outreach channels PG&E utilized to reach eligible customers during its 2014 ESA Program outreach campaign.

### Warm Transfer Outreach Method

To lessen barriers and encourage local support for each project area, PG&E, RHA and its ESA implementation contractors employed a "warm transfer" outreach method to enroll qualified customers. PG&E communicated its marketing strategies and shared pre-qualified data leads (i.e., customers enrolled in CARE that had not participated in ESA) with RHA and contractors on a regular weekly-to-monthly basis. Outreach tactics included the following: direct mail, phone/text messaging, media placement, participation in community events, and door-to-door canvassing. By working closely with RHA and its contractors on ESA's outreach plans, PG&E established a closer relationship with its customers in need of assistance with their energy bills. Contractors more familiar with PG&E's marketing materials were also able to easily reference ESA materials in the field to help discuss the ESA Program and its offerings.

The web interface between PG&E and RHA-contractors greatly improved when program materials and data leads were made more accessible through a secure SharePoint site. The web technology helped all program implementers socialize marketing materials from a central system. Having secure access to customer leads also contributed to sustained outreach in targeted project areas.

### Direct Mail

Bilingual ESA introduction letters were mailed to customers' homes, helping reduce barriers related to accessibility of program information in-language. PG&E rolled out the following ESA direct mail projects in 2014:

- CARE-enrolled: PG&E targeted customers enrolled in CARE that have not participated in ESA in PG&E's service area.

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<sup>2</sup> D.12-08-044 OP31 and OP32 ordered PG&E to continue to conduct approved ME&O efforts for ESA and CARE programs so not to lose any momentum and progress being made in those ongoing efforts.

- **High Energy Usage:** PG&E conducted a large-scale direct mail campaign to CARE-enrolled customers with energy use that is considerably above average, offering information about the ESA Program, and other helpful information about CARE, energy rates and bill assistance programs.

## **Partnerships**

In 2014, the ESA Program continued exploring new methods of partnering with community-based organizations (CBOs). As part of a comprehensive project to provide financial literacy education, PG&E worked to educate older adults, customers on fixed incomes, and customers with limited English proficiency about energy-saving practices and PG&E programs available to help them reduce their utility costs. A secondary goal was to inform the housing sponsors about available energy-saving opportunities, including the ESA, CARE, and Family Electric Rate Assistance (FERA) Programs. This effort is continuing in 2015.

## **Online**

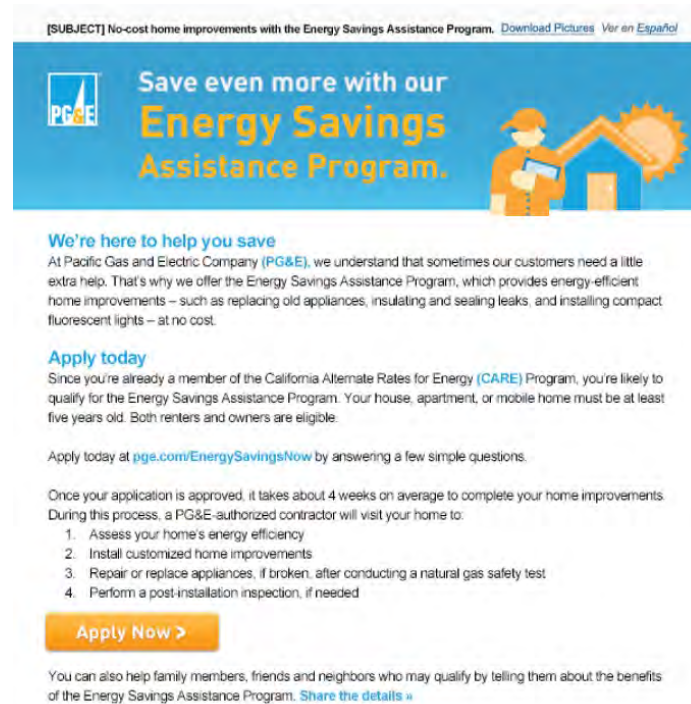
PG&E continues to utilize its website at [www.pge.com/energysavings](http://www.pge.com/energysavings) to promote ESA and encourage enquiries via phone and online referral form. Program information is available online in English, Spanish, Chinese, Vietnamese, Korean, Hmong and Russian, in a format that provides easy downloading and printing. Detailed information about the ESA Program is provided along with links to other assistance programs of potential interest to customers seeking information about the ESA Program.

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

During 2014, PG&E launched two multi-touch acquisition campaigns. These efforts included direct mail, email and automated voice messaging, targeting customers with a high propensity for eligibility. Throughout these efforts, PG&E continued to evaluate different channels, language, and design, identifying optimization opportunities and implementing learnings in real time for improved results, efficiency and cost-effectiveness.

PG&E launched the first wave of acquisition emails, direct mail, and automated voice messaging outreach through March and April. The emails garnered a 22% open rate with a 4% unique click-thru rate, above industry average. The campaign yielded over 4,300 new enrollments in its two-month duration.

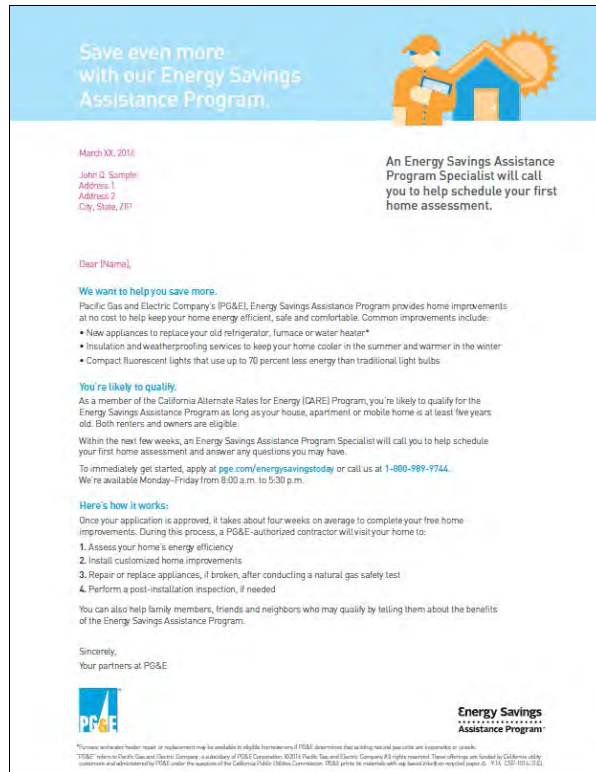
Sample email creative:



In November, PG&E launched the second wave of acquisition direct mail. We tested the performance of a letter versus a postcard to determine which one would be more effective in generating enrollments. The objective of direct mail was to introduce current CARE participants to the ESA Program as well as provide a warm-lead for the contractors. The campaign yielded over 7500 new enrollments in its two-month duration.

Sample direct mail creative:





Additionally, PG&E inserted more information about the ESA Program in current CARE participants' monthly bill packages twice throughout the year in May and October. The bill insert sent in May generated 173 visits to the vanity URL, 40% of these visits were Spanish speaking customers. The bill insert sent in October generated 474 visits to the vanity URL, 12% of these visits were Spanish speaking customers.



Sample bill insert:

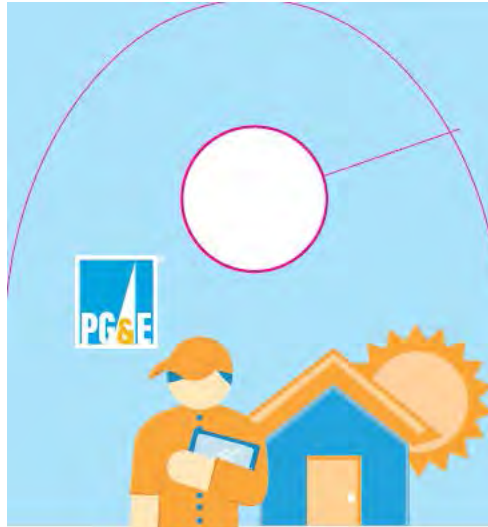


## Contractor Tools

Since the contractors conduct outreach for the ESA Program as well, PG&E launched a set of customizable tools to help contractors promote the ESA Program, as a result of direct feedback from the contractors. Available in both English and Spanish, the tools allow contractors to customize each piece with their company name and contact information while leveraging the PG&E logo and branding from existing ESA Program acquisition materials. The set of tools includes a door hanger for neighborhood canvassing, postcard for direct mail, and flyer for outreach at local events.



Sample contractor tool creative:



**Home improvements  
at no cost to you**

**Available for qualifying households**

Pacific Gas and Electric Company's (PG&E) Energy Savings Assistance Program provides home improvements at no cost to help keep your home more energy efficient, safe and comfortable. Common improvements may include:

- New appliances to replace your old refrigerator, furnace or water heater\*
- Insulation and weatherproofing services to keep your home cooler in summer and warmer in winter

Apply today by visiting [pge.com/EnergySavings](http://pge.com/EnergySavings) or by calling your Energy Savings Assistance Program Specialist at:

CONTRACTOR NAME  
XXXXXXXXXXXXXXXXXXXX  
CONTRACTOR TELEPHONE  
XXXXXXXXXXXXXXX

**Energy Savings  
Assistance Program**

\*Furnace and water heater repair or replacement may be available to eligible homeowners when PG&E determines existing natural gas units are inoperable or unsafe.  
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## Digital and Social Media

In April, PG&E added digital advertising to the marketing mix, with special focus on Spanish- and Chinese-speaking audiences, testing this channel's impact on awareness and acquisition for the ESA Program and CARE Program. Its main focus is on Spanish- and Chinese-speaking audiences, though it's also displayed on English sites. It is continuously optimized to ensure presence of top performing creative on the most effective sites. The digital advertising has generated over 90 million impressions and a 0.82% click rate, significantly more than the 0.06% industry benchmark.

Sample digital creative:

PG&E also leveraged its social media channels for the first time to spread awareness about the newly available online applications for the ESA Program in Spanish on PG&E's Facebook page and in Chinese on PG&E's Twitter handle.


Sample social media creative:



## Paid & Earned Media

On August 21, PG&E held a media event in Kern County, inviting the local media to an ESA participant's home to showcase the energy-efficient home improvements received through the program. Coverage included KGET-TV (NBC), KBAK-TV (CBS), KERO-TV (ABC), KKEY-TV (Telemundo), Azteca Bakersfield, and El Popular Newspaper and resulted in a 55.6% increase in website traffic the next day.

Sample media advisory:

 <b>Pacific Gas and Electric Company®</b>	Corporate Relations 77 Beale Street, B29D San Francisco, CA 94105 415/973-5930	<b>NEWS</b>
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### **\*\*MEDIA ADVISORY \*\***

#### **PG&E'S ENERGY SAVINGS ASSISTANCE PROGRAM HELPS CUSTOMERS MANAGE THEIR ENERGY USE AND SAVE MONEY**

*Partnership between PG&E and local contractors offers income-qualified renters and homeowners easy, free solutions*

**WHAT** PG&E's Energy Savings Assistance Program provides no-cost weatherization services to income-qualified households, which meet the income guidelines similar to those on the California Alternate Rates for Energy (CARE) Program. Services provided include attic insulation, energy efficient refrigerators, energy efficient furnaces, weather-stripping, caulking, low-flow showerheads, water heater blankets, and door repairs which reduce air infiltration.

Join us at the home of Rosie Serrata to learn more about the free program. The Serrata family enrolled in the Energy Savings Assistance Program and received more than \$3,000 in energy efficient upgrades at no cost. The services included a new window air conditioner, water cooler, new energy efficient doors, low-flow shower heads, and light fixtures. Rose Serrata also saw a significant savings on her monthly energy statement after the upgrades were installed.

**WHEN** Thursday, August 21  
10:00 a.m.

**WHERE** 3312 Monterey Street, Bakersfield

**WHO** Rosie Serrata, ESA Program recipient  
Katie Allen, PG&E Rep

**WHY** PG&E's Energy Savings Assistance Program provides income-qualified renters and homeowners with easy, free solutions to help manage their energy use and save money on their monthly energy bills. Local contractors are trained to implement the program on behalf of PG&E, which include energy specialists, weatherization specialists and natural gas appliance technicians. There are five local contractors to choose from in Kern County. To check the income guidelines or for more information on the program, call (800) 989-9744.

**VISUALS**

- Energy efficiency upgrades within the Serrata home
- Interview with homeowner who utilized the Energy Savings Assistance Program

**CONTACT** PG&E Corporate Relations, Katie Allen (661) 865-8637

From May to December, PG&E experimented with radio as a way to reach ethnic audiences through targeted mass channels. We targeted Spanish-speaking audiences in Fresno, Sacramento and San Francisco Bay Area, testing various stations to raise awareness for the ESA Program and CARE Program. We had over 6,700 radio spots run throughout 2014.

PG&E continued to participate in radio and television media interviews to promote the ESA Program and CARE Program with the following outlets:

- KFTV Univision's daily morning show *Arriba Valle Central* "Wake Up Central Valley" hosted by Lupita Lomeli, a Hispanic icon in the Central Valley, with coverage in Fresno and Visalia
- Hmong TV Network serving Hmong customers throughout Merced, Mariposa, Madera, Fresno, Tulare and King
- KABE Univision 39 *Bakersfield al Dia* with coverage in the Bakersfield DMA
- KFSO's public affairs show *Servicio a la Comunidad* with coverage in Stanislaus, Merced, Madera, Fresno, Tulare and Kings
- KIQI's community affairs show *Ventana a la Comunidad* with coverage in Marin, Sonoma, Napa, Solano, Contra Costa, Alameda, San Mateo, Santa Clara, San Francisco and Sacramento
- KLOQ Radio Lobo for coverage in Merced and Stanislaus counties
- KTRB ESPN Deportes with coverage in Northern California including San Francisco, Oakland, San Jose, Santa Rosa, Sacramento, Stockton and Modesto
- Radio Bilingue's show *Comunidad Alerta*, part of the Public Radio Network with coverage in Fresno, Modesto, Stockton, Salinas and Mendocino
- Sing Tao Radio offering programs in both Mandarin & Chinese in the San Francisco Bay Area
- Univision Radio 's community affairs show *Contacto Comunitario* for coverage in Greater Fresno and Madera, Merced, Visalia, Tulare and Kings counties

### Community Events

During the month of May, PG&E participated in Cinco de Mayo events in Fresno and San Jose to build awareness among Spanish-speaking communities. At the events, PG&E showcased an electric safety demonstration and shared information on public safety, energy efficiency, and financial assistance programs.

PG&E's presence during these events demonstrated that these events were successful at engaging customers in holistic solutions. Thus, PG&E participated in four Hispanic and Chinese community events throughout the month of September. These events were an opportunity to promote the ESA Program and CARE Program through radio endorsements leading up to and at the event as well as through one-on-one outreach.

- On September 6-7, PG&E joined the 24<sup>th</sup> Annual Autumn Moon Festival in San Francisco Chinatown, which had over 100,000 attendees
- On September 14, PG&E held a booth at the Fiestas Patrias Celebration in Placer County Fairgrounds, which had over 12,000 attendees
- On September 20-21, PG&E participated in the 19<sup>th</sup> International Dragon Boat Festival on San Francisco Treasure Island, which had over 80,000 people in attendance
- On September 28, PG&E contributed at the Festival de Sol in Santa Clara

Additionally, PG&E made the Integrated Programs brochure, which includes information on the CARE Program and ESA Program, available at safety events throughout the month of April as part of National Safe Digging Month. The events were held over the course of four Saturdays in Sacramento, San Jose, Emeryville, and Modesto.

## Sample Integrated Programs brochure:

## Three Simple Steps to Energy Bill Savings

1

## Monthly Discount

## California Alternate Rates for Energy (CARE) Program

Over 30 percent of PG&E customers have already enrolled in the CARE Program, saving an average of \$565 per year on their energy bills.

Check the chart below to see if you qualify. Apply at [pge.com/CARE](http://pge.com/CARE).

NUMBER OF PERSONS IN HOUSEHOLD	TOTAL COMBINED ANNUAL INCOME CARE*	FERR*
1-2*	Up to \$31,020	Not eligible
3	Up to \$39,060	\$39,061 - \$49,825
4	Up to \$47,100	\$49,826 - \$59,575
5	Up to \$55,140	\$59,576 - \$69,325
6	Up to \$63,180	\$69,326 - \$79,075
7	Up to \$71,220	\$79,076 - \$89,825
8	Up to \$79,260	\$89,826 - \$99,575
Each additional person, add	\$8,040	\$10,000 - \$10,000

\*Before taxes based on current income sources.

\*New as of January 1, 2014 and valid through May 31, 2014.

If you do not qualify for CARE, you may still be eligible for the Family Electric Rate Assistance (FERA) Program, which offers a discount on monthly bills for families of three or more. Apply at [pge.com/FERA](http://pge.com/FERA).

## Medical Baseline

If you depend on life-support or other equipment due to medical needs, you may be eligible for additional energy at the lowest price through the Medical Baseline Program. Apply at [pge.com/MedicalBaseline](http://pge.com/MedicalBaseline).

2

## One-Time Home Improvements

## Energy Savings Assistance (ESA) Program

If you are eligible for the CARE Program and your home is five or more years old, then you may also qualify for the ESA Program.

You could be eligible to receive free energy-efficient home improvements, such as:

- Appliances to replace your old refrigerator, furnace and water heater<sup>†</sup>.
- Weatherization services to keep your home cooler in the summer and warmer in the winter.
- Installation of compact fluorescent lights that use up to 70 percent less energy than incandescent lights.

## PG&amp;E and our authorized contractors will:

1. Assess your home's energy efficiency.
2. Install customized home improvements.
3. Repair or replace appliances, if needed, after conducting a natural gas safety test.
4. Perform a post-installation inspection, if needed.

Apply at [pge.com/ESA](http://pge.com/ESA).

3

## Ongoing Savings

## Manage your heating and cooling costs

In the winter, set your heater to 68 degrees Fahrenheit or lower during the day and 55 degrees Fahrenheit at night. In the summer, set your air conditioner to 78 degrees Fahrenheit or higher and visit a community cooling center when temperatures are unusually high. Visit [pge.com/CoolingCenter](http://pge.com/CoolingCenter).

## Stop paying to power unused electronics

Turn off and unplug computers, TVs, phone chargers, entertainment consoles, coffee makers and other devices. The average U.S. household spends \$100 per year powering electronics that have been turned off or are in standby mode.

## Wash full loads of laundry using cold water

Today's detergents work well in cold water, saving about 90 percent of the energy your washing machine would use to heat water.

## Use your refrigerator efficiently

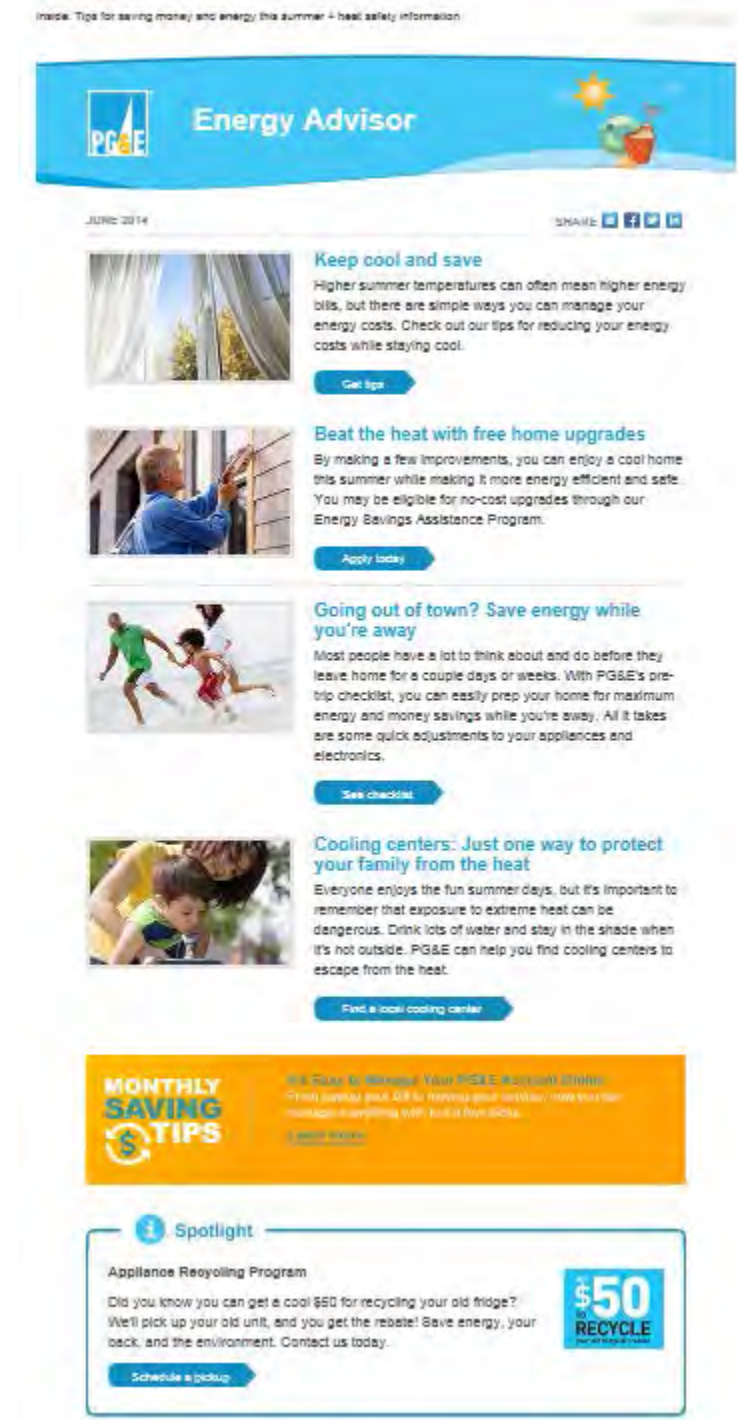
Set your refrigerator from 38 to 40 degrees Fahrenheit and your freezer from 0 to 5 degrees Fahrenheit. Make sure the coils are clean and have room for air circulation.

## Digital Newsletter and Home Energy Report

In March, PG&E kicked-off a monthly digital newsletter targeting customers with a high propensity for eligibility in the ESA Program and CARE Program with the purpose of building awareness for both programs. The ESA Program was featured in the June and November's digital newsletter. June's digital newsletter resulted in an overall 19% open and 7% click-thru rate, above industry average. November's digital newsletter resulted in an overall 24% open and 15% click-thru rate, above industry average. In the other months, the digital newsletter provided energy savings tools and tips to help customers better manage their energy usage and bill.

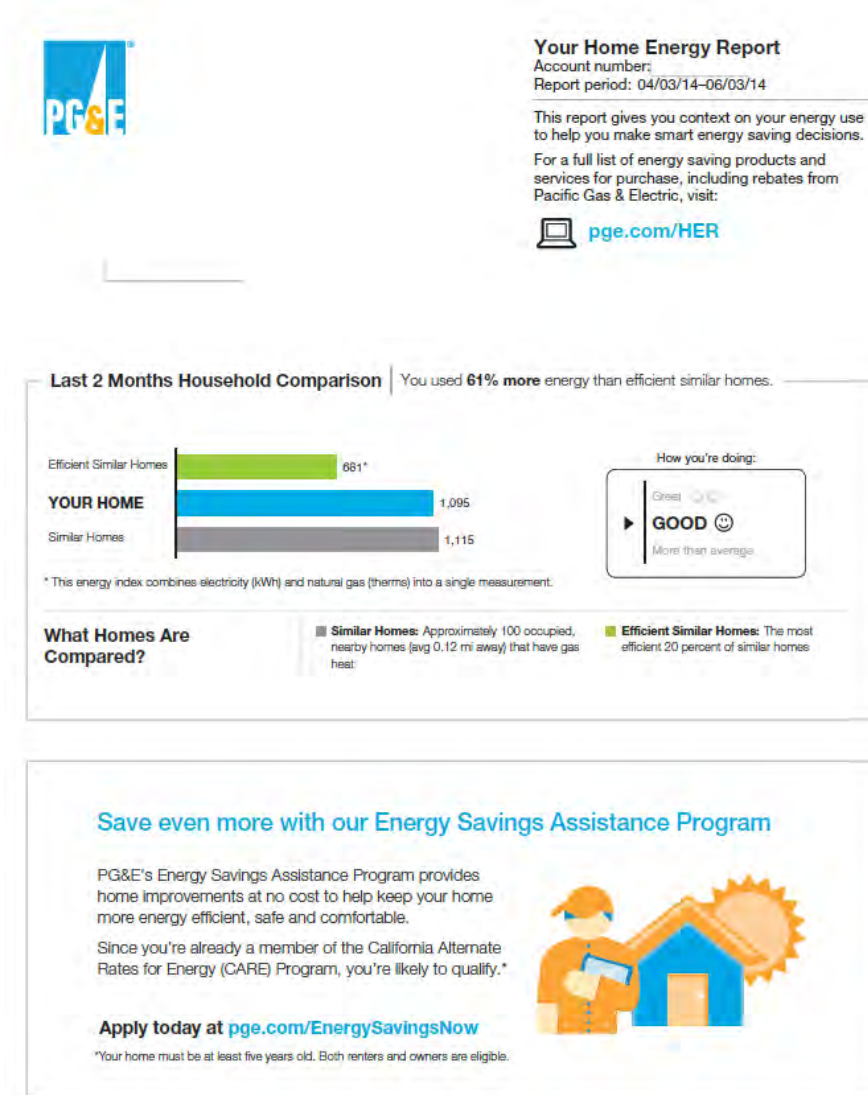


Sample digital newsletter creative:



Additionally, PG&E launched the ESA Program module for PG&E's Home Energy Report. This version will be sent throughout May, June and July to existing CARE customers who already receive PG&E's Home Energy Report.

## Sample Home Energy Report creative:



## Website

In November, PG&E outreach team optimized the design and messaging of the ESA Program main webpage. PG&E conducted an A/B test, which is a way to test messaging and layout to a randomly selected group so that we can understand what's most effective when communicating with customers. Results show a 22% increase in visits to the enrollment page by adding a banner at the top of the webpage with a link to the enrollment page.

## Sample webpage creative:

## Current Site

**Energy Savings Assistance Program**

PG&E's Energy Savings Assistance Program provides income-qualified renters and homeowners with easy, free solutions to help manage their energy use and save money on their monthly energy bills.

**You may be eligible for the following services provided by PG&E:**

- Improvements to your house, apartment or mobile home including compact fluorescent lights, caulking, showerheads, minor home repair and more.
- Replacement of your old refrigerator, furnace and/or water heater<sup>1</sup>.
- Energy savings tips.

Check the income guidelines below then complete an online application or speak with a program specialist at **1-800-999-9744**.

<sup>1</sup>Furnace and water heater repair or replacement may be available to eligible homeowners when PG&E determines existing natural gas units are inoperable or unsafe.

**Income Guidelines**

Number of Persons in Household	Total Gross Annual Household Income*
1-2	\$31,440 or less
3	\$39,580 or less
4	\$47,700 or less
5	\$55,820 or less
6	\$63,940 or less
7	\$72,060 or less
8	\$80,180 or less
Each additional person, add	\$9,120

\*Before taxes based on current income sources.  
Note: Valid through May 31, 2015.

**TDD/TTY: 1-800-452-4712** Monday-Friday 8:00 a.m. - 5:30 p.m.  
If unable to access the TDD/TTY number, please call the California Relay line at **1-800-735-2429**.

## Experiment Site

**Energy Savings Assistance Program**

We'll make your home more energy efficient for free.

[Apply Now](#)

**Saving Energy Can Save You Money**

Improving the energy efficiency of a home can significantly reduce energy bills. Not everyone, however, can afford to make these updates. That is why we offer the Energy Savings Assistance Program. It provides qualified customers with energy-saving improvements at no charge.

**Check the Guidelines**

Participants must live in a house, mobile home or apartment that is at least five years old. Income must meet the following guidelines, which are the same as those for CARE, the California Alternative Rates for Energy Program.

Number of Persons in Household	Total Gross Annual Household Income*
1-2	\$31,440 or less
3	\$39,580 or less
4	\$47,700 or less
5	\$55,820 or less
6	\$63,940 or less
7	\$72,060 or less
8	\$80,180 or less
Each additional person, add	\$9,120

\*Before taxes based on current income sources.  
Valid through May 31, 2015. \*Before taxes based on current income sources.

**Apply**

The online application only takes a few minutes to complete. No proof of income is necessary to apply and your answers will be kept confidential.

[Apply Now](#)  
[Solicite ahora](#)  
[申請](#)

**Set Up a Home Assessment**

Once your application has been reviewed, an energy specialist will contact you to schedule an assessment of your home. During the visit, the specialist will determine if your home qualifies for the program and, if so, the improvements to be made. At this time, you will also need to provide proof of household income.

If you would like to speak to a program specialist, please call **1-800-999-9744**.

**Program Information in Large Print**

- Information in English
- Information in Spanish
- Information in Chinese
- Information in Vietnamese
- Information in Korean
- Information in Hmong
- Information in Russian

**Additional Resources**

**Breathe Easy Solutions™**

PG&E is dedicated to assisting customers through numerous programs and community outreach projects.

**Learn More >>**

**Service Shut off for Non-Pay**

Learn more about the many steps we take to work with our customers and our "outreach process before disconnect."

**Learn More >>**

**Third Party Notification**

For a friend or relative who could overlook paying for her PG&E bill because of illness, financial hardship or other issues.

**Learn More >>**

**We Connect**

A national program that connects families to programs and services that can help them get ahead.

**Learn More >>**

**Contact Us**

Questions About Rebates or Energy Savings Programs?  
Call PG&E's Smarter Energy Line at 1-800-933-9335.

For General Questions, Please Contact PG&E's Customer Service Center at 1-800-743-5000.

[Email the Smarter Energy Line](#)

**Improvements that Make a Difference**

Energy-saving measures through the Energy Savings Assistance Program can include repairing or replacing your refrigerator, furnace or water heater<sup>1</sup> and installing insulation, weatherproofing, energy-efficient light bulbs, caulking, low-flow showerheads and more.

<sup>1</sup>Furnace and water heater repair or replacement may be available to eligible homeowners if PG&E determines that existing natural gas units are inoperable or unsafe.

**Information in Large Print**

Download easy-to-print Energy Savings Assistance Program information.

[English \(PDF\)](#)  
[Español \(PDF\)](#)  
[中文 \(PDF\)](#)  
[越南 \(PDF\)](#)  
[한국 \(PDF\)](#)  
[Hmong \(PDF\)](#)  
[Русский \(PDF\)](#)

## Focus on Ethnic Media (Radio, TV, Newspapers)

PG&E has continued to implement the Marketing, Education, and Outreach efforts as directed in Decision D.12-08-044 OP 31, to work to overcome the cultural and language barriers that stifle the low income communities' understanding of the low income programs. As described in section 1.3 above, PG&E has conducted thorough outreach to increase participation in the Energy Savings Assistance Program with a particular emphasis on overcoming language and cultural barriers through ethnic media, such as newspapers, radio, and television. PG&E included a focus on ethnic media with the following efforts. PG&E participated in media interviews to promote the ESA Program and CARE Program with the following outlets as a way to reach ethnic audiences through targeted mass media channels in ten different ethnic radio and TV media outlets. In addition, PG&E held a media event in Kern County, inviting the local media to an ESA participant's home to showcase the energy-efficient home improvements received through the program with coverage on KKEY-TV (Telemundo), Azteca Bakersfield, and El Popular Newspaper. PG&E conducted digital advertising to the marketing mix, with special focus on Spanish- and Chinese-speaking audiences, and leveraged its social media channels in Spanish on PG&E's Facebook page and in Chinese on PG&E's Twitter handle. PG&E participated in four Hispanic and Chinese community events including the Autumn Moon Festival, Fiestas Patrias Celebration, Dragon Boat Festival, and Festival de Sol.



## Statewide Marketing Education & Outreach

Decision D.12-08-044 OP 34 requires continued statewide marketing education and outreach efforts for the Energy Savings Assistance Program. The Center for Sustainable Energy (CSE) was direct awarded the contract to administer the Statewide Marketing, Education, and Outreach campaign under the direction and supervision of the Commission. Decision 13-12-038 issued on December 27, 2013 directed the Center for Sustainable Energy to immediately begin efforts to develop and implement the statewide outreach campaign through the end of 2015. The statewide campaign began conducting outreach through a rotating set of campaigns with a campaign focus on the Energy Savings assistance program in November and December 2014 timeframe. CSE's Integrated Communications plan for October 2014 through March 2015 indicated paid, earned, and social media, community outreach, and website support.

- 1.3.2. Describe how the current program delivery strategy differs from previous years, specifically relating to Identification, Outreach, Enrollment, Assessment, energy Audit/Measure Installation, and Inspections.

PG&E's 2014 ESA Program was a continuation of its 2012-2013 programs, and was the third year of the authorized 2012-2014 ESA Program cycle authorized in D.12-08-044. Most energy assessment, measure installation and inspection practices and procedures remained the same. PG&E continued to incorporate successful strategies to modify the existing ESA Program approach to program delivery, especially regarding identification and outreach strategies. Many of these activities are described in detail in Section 1.3.1.

In 2014, PG&E identified customers who may be most eligible for the ESA Program by reaching out to current CARE participants since we know that these customers are income-qualified. From there, we removed those customers who live in homes that are less than five years old as well as those customers who live in ESA treated homes. This was a new strategy for 2014.

### Multifamily

In 2014, the ESA Program made a concerted effort to increase enrollment of customers living in multifamily housing. These strategies included clearly defining multifamily production goals for the ESA Program administrator, and creating incentives for ESA contractors who were able to significantly increase service to multi-family units. Using these strategies, the penetration rate for the multifamily sector increased from 17% in 2012 to over 25% in 2014.

### Partnerships

In 2014, the ESA Program explored new methods of partnering with community-based organizations (CBOs). As part of a comprehensive project to provide energy literacy education, PG&E worked to educate older adults, customers on fixed incomes, and customers with limited English proficiency about energy-saving practices and PG&E programs available to help them reduce their utility costs. A secondary goal was to inform the housing sponsors about available energy-saving opportunities, including the ESA, CARE, and Family Electric Rate Assistance (FERA) Programs. This effort is continuing into 2015.

As part of Residential Rate education campaign efforts, the ESA Program partnered with other community based organizations and PG&E programs to participate in strategic community events. Whereby, ESA contractors presented customers with an array of energy and water measures to customers. For example, ESA contractor, Staples, brought samples of their measures (i.e. light fixtures, insulation, water-efficient showerheads, etc.), to a PG&E-hosted CARE Community Outreach Event in

Bakersfield to offer billing and energy efficiency support to underserved populations in Bakersfield. The ESA partnerships were instrumental in enabling PG&E to provide more holistic offerings with other PG&E programs and services.

#### **1.4. ESA Program Customer Enrollment**

- 1.4.1.** Distinguish between customers treated as “go backs” and brand new customers so that the Commission has a clear idea of how many new customers the IOUs are adding to the ESA Program.

In 2014, PG&E treated 17,556 “Go-Back” customers, which are customers treated prior to 2002. Although these customers are eligible to be treated again, D.08-11-031 stressed that the IOUs should first seek out new households that have not yet been treated, and report previously treated customers in our Annual Reports.

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

In 2014, PG&E’s ESA Program contractors streamlined customer enrollment strategies by continuing to incorporate categorical eligibility and self-certification into ESA Program processes where applicable. Contractors worked with property agents to get signed Property Owner Waivers for entire multifamily complexes in order to perform work on all of the units at the same time.

PG&E customers may enroll through categorical eligibility programs that are included on the ESA Program enrollment forms. This allows eligible customers to skip showing proof of household income. The Commission-approved categorical eligibility programs were also added to the ESA program database.

PG&E continued to encourage contractors to work in the 80 percent self-certification areas<sup>3</sup> by providing them with breakdowns of estimated eligible customers by ZIP-7 to use in their customer recruitment activities. PG&E discussed targeting strategies at contractor meetings and helped plan enrollment events with contractors and community organizations.

- 1.4.3.** If the IOU has failed to meet its annual goal of number of households served, please provide an explanation of why the goal was not met. Explain the programmatic modifications that will be implemented in order to accomplish future annual goals of number of households served.

PG&E treated 1243,539 customer homes in program year 2014, and reached 103% percent of the goal authorized in D.12-08-044. PG&E’s 2012-2014 cycle goal authorized in D.12-08-044 was 359,820 customers. PG&E exceeded that goal, treating a total of 362,334 customers during this program cycle.

<sup>3</sup> Customers living in Zip codes having 80% or more households at or below the ESA-qualifying 200% of Federal Poverty Guideline Level are allowed to self-certify their eligibility, per D.08-11-031, OP6.

## 1.5. Disability Enrollment Efforts

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

Disabled customers made up 22 percent of the ESA Program enrollees in 2014, exceeding the 15 percent penetration goal.

- 1.5.2.** Describe how the ESA Program customer segmentation for ME&O and program delivery takes into account the needs of persons with disabilities.

As stated above, PG&E exceeded the 15 percent penetration goal for disabled enrollees in 2014.

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

2014 Disability Enrollments			
Source	Total Enrollments	Disability Enrollments	% of Disability Enrollment
Various contractor recruiting and sign-ups			
<b>Total Enrollment Rate</b>	123,595	26,710	<b>22%</b>

At this time, PG&E has no data-sharing agreements with agencies serving disabled clients. PG&E will continue to explore new partnership opportunities and seek out new ways to better reach its disabled customers.

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

As stated above, PG&E's 2014 ESA Program disabled community participation was 22 percent – above the Commission's 15 percent goal.

## 1.6. Leveraging Success, Including Low Income Home Energy Assistance Program (LIHEAP)

D.08-11-031 defined leveraging as “an IOU’s effort to coordinate its ESA Program with programs outside the IOU serving low income customers. These include programs offered by the public, private, non-profit or for-profit, local, state, and federal government sectors that result in energy efficiency measure installations in low income households.” Progress is measured by tracking the following criteria:

- *Dollars saved.* Leveraging efforts are measurable and quantifiable in terms of dollars saved by the IOU (Shared/contributed/ donated resources, elimination of redundant processes, shared/contributed marketing materials, discounts or reductions in the cost of installation, replacement and repair of measures, among others are just some examples of cost savings to the IOU).
- *Energy savings/benefits.* Leveraging efforts are measurable and quantifiable in terms of home energy benefits/savings to the eligible households.
- *Enrollment increases.* Leveraging efforts are measurable and quantifiable in terms of program enrollment increases and/or customers served.

- 1.6.1.** Describe the efforts taken to reach out and coordinate the ESA Program with other related low income programs offered outside the IOU that serve low income customers.

PG&E continues to proactively seek out and take advantage of all leveraging opportunities for ESA with other programs offered in California, as mandated by D.12-08-044, OP17. Leveraging partnerships with CSD's LIHEAP provides one of the most obvious examples of leveraging opportunity, and PG&E's 2014 work with CSD is described in Section 1.6.3.

- 1.6.2.** In addition to tracking and reporting whether each leveraging effort meets the above criteria in order to measure the level of success, please describe the Other Measurable Benefits resulting from this particular partnership not captured under the 3 criteria described above.

See ESA Program Table 14 – Leveraging & Integration.

- 1.6.3.** Please provide a status of the leveraging effort with CSD. What new steps or programs have been implemented for this program year? What was the result in terms of new enrollments?

PG&E continued to implement its successful refrigerator leveraging program with Low Income Home Energy Assistance Program (LIHEAP) providers. Through this leveraging program, LIHEAP agencies in PG&E's service area that are not ESA contractors can receive ESA Program refrigerators for their qualified PG&E electric customers, thus freeing more LIHEAP funding to provide other services to low income households. PG&E counts these refrigerators and their savings, but not the CSD "treated" home. In 2014, 119 ESA refrigerators were provided through LIHEAP leveraging contracts.

In addition, PG&E, SCE, SDG&E and SoCalGas have been meeting with CSD and Energy Division staff monthly since October 16, 2012 to discuss other leveraging opportunities, in compliance with D.12-08-044 directives. These meetings continued throughout 2014.

D.12-08-044, OP25 a-b, specifically directed the IOUs to focus leveraging efforts with CSD on the development of a comprehensive statewide database system or bidirectional data sharing exchange to better enable identification of households served under both the LIHEAP and ESA Programs. Beginning in 2013 and continuing through 2014, the CSD leveraging team discussed data sharing protocols that could include customers previously served or on wait lists by either the utilities or LIHEAP agencies. The team discussed the efficacy and feasibility of implementing simple and less costly bidirectional data exchange processes for sharing customer information between LIHEAP agencies and the IOUs. Such data sharing strategies could help more low income customers receive ratepayer and taxpayer funded low income energy efficiency services. For example, PG&E customers requiring HVAC or other services which the utilities are unable to provide under ESA Program guidelines, could potentially be qualified through a data exchange to receive these services under the CSD programs.

Discussions regarding data sharing opportunities continued in 2014, and the parties continue to identify and address issues such as customer confidentiality and privacy, cost, infrastructure, and differing program processes. However, as a result of these discussions, new customer authorization language allowing IOUs to share customer data with CSD was developed and added to the ESA enrollment forms.

In addition to work on data sharing, PG&E and the other IOUs continued to implement two leveraging pilots with CSD in 2014. These focused on providing solar water heating and geographic coordination.

The solar water heating pilot began in 2013 and continued through 2014. Through this pilot, CSD is working with all of the IOUs to identify and inform ESA low income customers in qualifying State Enterprise Zone (EZ) Targeted Employment Areas (TEAs) that they may be eligible to receive additional federal rebates buying down the cost of purchasing and installing solar water heaters. This pilot has been particularly challenging due to various customer confidentiality and data sharing restrictions that had to be worked out prior to communicating with potentially eligible ESA customers.

PG&E and CSD also worked together on a geographic coordination pilot targeting high energy users and underserved rural populations, specifically those that use non-regulated fuel sources (wood, propane, and heating oil) that cannot be served by the IOU programs. Through this pilot, qualified customers in Butte and Fresno Counties received a full complement of measures and services through dual ESA-CSD providers acting as a single point of contact providing streamlined delivery of services. This pilot tested whether this more coordinated approach reduces overhead, administration and delivery costs as they relate to service delivery. The geographic coordination pilot began in December 2012 and was completed in 2014. It is described below.

### **PG&E's Geographic Coordination Pilot With CSD's LIHEAP Program**

In 2012-2014, a pilot study was conducted to develop and test improved coordination strategies between ESA and CSD's LIHEAP. Both of these programs offer residential EE measures and health and safety repairs to qualifying customers' homes. With few exceptions, these programs are run independently from one another. The purpose of this pilot was to explore opportunities to coordinate delivery of these two programs to the benefit of low income residents, federal tax payers, low income utility customers, and utility rate payers. The Geographic Coordination Pilot leveraged the two program models to expand capacity to serve more customers with a more efficient suite of EE measures. This leveraging pilot focused on high energy users and single utility fuel customers, two customer segments that the ESA Program has identified as harder to serve, and demonstrated the value that a leveraged program can bring to these customers.

Historically, coordination of the ratepayer-funded ESA Program and the federally-funded, state-run LIHEAP and WAP has not progressed due to differences in program design and implementation, and inflexibility of regulatory requirements. In order to overcome these barriers, pilot study stakeholders utilized a phased approach. The first phase, "Pilot Planning and Development" focused on aligning program policies and standards to allow successful leveraging within the framework of each program. During this phase, program stakeholders worked together to develop a streamlined, coordinated approach designed to achieve the desired results.

Upon completion of the development phase, LIHEAP and ESA staff were trained on the updated processes and tools, and set out to weatherize a total of 100 leveraged homes. During this phase, data was collected and evaluated, and unforeseen challenges were addressed as needed. Upon completion of the 100th home, all data was collected and analyzed to determine whether the three pilot goals (saving dollars, savings energy and/or increasing non-energy benefits, increasing enrollments) were achieved.

The Geographic Coordination Pilot was completed and evaluated in 2014.<sup>4</sup> The Geographic Coordination Pilot demonstrated that by leveraging LIHEAP and the ESA Program: (1) more low income customers can qualify for the ESA program; (2) they can receive more types of measures; and (3) receive

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<sup>4</sup> CSD/PG&E Weatherization Programs Geographic Coordination Pilot Final Report. October 1, 2014. Prepared by: RHA, Inc. Prepared for: CSD and PG&E.

increased number of measures in their homes. However, this Pilot did not demonstrate that these benefits can be realized while simultaneously reducing overall program administrative and diagnostic costs.

PG&E proposed a second phase pilot with CSD in its 2015-2017 ESA Application. This second pilot will address pilot evaluation recommendations, including clearly defining sustainable leveraging opportunities; defining data sharing process to facilitate leveraging; and developing leveraging protocols for areas where the ESA Program and LIHEAP are delivered by different entities.

### **Leveraging with Other IOUs**

In addition to working with CSD to explore new leveraging strategies, PG&E also worked with the other IOUs in 2014 to share successful leveraging models and duplicate leveraging effort successes per D.12-08-044, OP21. For example, in 2014, PG&E worked cooperatively with the other IOUs to put together a single Property Owner Waiver for ESA contractors to use in overlapping territories to make it easier for rental customers to leverage ESA program participation. PG&E continues to actively explore new opportunities and to coordinate actual program delivery to promote long term enduring energy savings and cost efficiency.

### **1.7. Integration Success**

As defined in D.08-11-031, "Integration constitutes an organization's internal efforts among its various departments and programs to identify, develop, and enact cooperative relationships that increase the effectiveness of customer demand side management programs and resources. Integration should result in more economic efficiency and energy savings than would have occurred in the absence of integration efforts." D.12-08-044 (OPs14 and 16) ordered the IOUs to continue their tracking and report to the Commission on the status of each of their ESA Program specific integration efforts, and to identify and explain if those efforts meet at least two of the four ESA Program integration goals (interdepartmental coordination, program coordination, data sharing, and marketing education and outreach coordination).

See ESA Program Table 14 – Leveraging & Integration.

- 1.7.1.** Describe the new efforts in program year to integrate and coordinate the ESA Program with the CARE Program.

PG&E distributed a redesigned customer assistance program brochure called “Integrated Services Brochure” in multiple languages in 2014.

### Three Simple Steps to Energy Bill Savings

#### 1 Monthly Discount

**California Alternate Rates for Energy (CARE) Program**

Nearly 1.4 million of PG&E customers have already enrolled in the CARE Program.

Check the CARE website to see if you qualify. Apply at [pgae.com/care](http://pgae.com/care).

TOTAL DEPENDENT ANNUAL HOUSEHOLD INCOME	CARE Discount	PERK
1-2	\$11.00 or less	None
3	\$12.00 or less	\$20.00-\$29.99
4	\$13.00 or less	\$30.00-\$39.99
5	\$14.00 or less	\$40.00-\$49.99
6	\$15.00 or less	\$50.00-\$59.99
7	\$16.00 or less	\$60.00-\$69.99
8	\$17.00 or less	\$70.00-\$79.99
9	\$18.00 or less	\$80.00-\$89.99
10	\$19.00 or less	\$90.00-\$99.99
Each additional person, add	\$1.00	\$10.00-\$19.99

Income based on federal poverty guidelines. Visit [www.fpo.gov](http://www.fpo.gov) for more info.

If you do not qualify for CARE, you may still be eligible for the Family Electric Rate Assistance (FERA) Program, which offers a discount on monthly bills for households of three or more. Apply at [pgae.com/fera](http://pgae.com/fera).

**Medical Baseline**

If you depend on life-support or other equipment due to medical needs, you may be eligible for additional energy at the lowest price through the Medical Baseline Program. Apply at [pgae.com/medicalbaseline](http://pgae.com/medicalbaseline).

#### 2 Home Improvements at No Cost

**Energy Savings Assistance Program**

If you are eligible for the CARE Program, you may also qualify for the Energy Savings Assistance Program.

If you live in a home, apartment, or mobile home built in 1978 or older, you could receive free improvements to keep your home more energy efficient, safe and comfortable. Both renters and owners are eligible. Certain improvements may include:

- Appliances to replace your old refrigerator, furnace and water heater.
- Insulation and weatherproofing services to keep your home cooler in the summer and warmer in the winter.
- Compact fluorescent lights that use up to 75 percent less energy than incandescent lights.

**PG&E and our authorized contractors will:**

1. Assess your home's energy efficiency.
2. Install customized home improvements.
3. Repair or replace appliances, if needed, after confirming a national warranty.
4. Perform a post-installation inspection, if needed.

Apply at [pgae.com/energyassistance](http://pgae.com/energyassistance).

#### 3 Ongoing Savings

**Manage your cooling and heating costs**

In the summer, set your air conditioner to 78 degrees Fahrenheit or higher. Visit one of our community cooling centers when temperatures are unusually high. In the winter, set your heater to 68 degrees Fahrenheit or lower during the day and 55 degrees Fahrenheit at night. Visit [pgae.com/coolingsavings](http://pgae.com/coolingsavings).

**Stop paying to power unused electronics**

Turn off and unplug computers, TVs, phone chargers, entertainment centers, coffee makers and other devices. The average U.S. household spends \$100 per year powering electronics that have been turned off or are in standby mode.

**Wash full loads of laundry using cold water**

Today's detergents work well in cold water, saving about 90 percent of the energy your washing machine would use to heat water.

**Use your refrigerator efficiently**

Set your refrigerator from 38 to 40 degrees Fahrenheit and your freezer from 0 to 5 degrees Fahrenheit. Make sure the coils are clean and have room for air circulation.

Turning off use of power repair in household may be subject to utility's discretion. PG&E reserves the right to modify program details without notice.

### 1.7.2. Describe the new efforts in program year to integrate and coordinate the ESA Program with the EE Residential Program.

The ESA Program team continued to work closely with the EE statewide marketing team to coordinate efforts related to statewide branding. Web portal staff from multiple PG&E programs participated together in integrated program events to provide information to customers on many PG&E programs available to them.

The following activities also took place in 2014:

**Direct Install for Manufactured and Mobile Homes Program:** This program serves customers in mobile homes with direct install measures, including compact fluorescent lamps (CFLs), low-flow showerheads, faucet aerators, optimization of the refrigerant in central air conditioners, and replacing the blower fan motor in a central air conditioner with a new, energy-efficient brushless fan motor. The program implementer also implements the ESA Program, and through this program is able to install a comprehensive set of energy efficiency measures in the customer's mobile home in one trip, at no cost to the customer, billing the services to the appropriate program.

**Multifamily Energy Efficiency Rebate Program (MFEER):** This program offers property owners and managers incentives for installing energy efficient measures related to the retrofit of existing multifamily properties of two or more units. ESA Program outreach is integrated into outreach for MFEER.

- 1.7.3.** Describe the new efforts in program year to integrate and coordinate the ESA Program with the Energy Efficiency Government Partnerships Program.

The ESA Program team partnered with the Government Partnership program to enroll homes in the Moderate Income Direct Install (MIDI) Program in. Additionally, the ESA Program team worked with the Local Government Partnership team to begin closer coordination around delivery of the programs.

- 1.7.4.** Describe the new efforts in program year to integrate and coordinate the ESA Program with any additional EE Programs.

In 2014, all PG&E efforts to integrate and coordinate the ESA Program with other EE Programs occurred with the EE Residential Program and the EE Government Partnership Programs. These efforts are described in Sections 1.7.2 and 1.7.3.

- 1.7.5.** Describe the new efforts in program year to integrate and coordinate the ESA Program with the DR Programs.

In 2014, PG&E installed SmartAC devices as part as the leveraging effort between the ESA Program and the SmartAC team in 2013.

- 1.7.6.** Describe the new efforts in program year to integrate and coordinate the ESA Program with the CSI Programs.

### **Multifamily Affordable Solar Housing Program**

In 2014, the ESA Program continued to integrate with solar programs to fast-track qualifying low-income customers through the ESA Program prior to them receiving solar measures.

### **Single Family Affordable Solar Housing Program**

In 2014, PG&E's ESA Program continued to work with Grid Alternatives to deliver ESA services to customers that were approved to participate in the Single Family Affordable Solar Housing (SASH) Program. Grid Alternatives referred SASH-eligible homes into PG&E's ESA Program on a regular basis. Customers that had not yet participated in the ESA Program were placed in the program. The home was assessed and delivery of all eligible measures was expedited. Following measure installation, PG&E notified Grid Alternatives regarding the measures that were installed in the home. Grid Alternatives used this data in their calculations to accurately size the SASH solar unit installation. The ESA Program treated 56 homes that were selected for SASH Program participation. PG&E supplied ESA measure installation data for 139 SASH-selected homes that were treated through the ESA Program in previous years.



## 1.8. Workforce Education and Training

### 1.8.1. Please summarize efforts to improve and expand ESA Program workforce education and training (WE&T). Describe steps taken to hire and train low income workers and how such efforts differ from prior program years.

In 2014, PG&E had 39 ESA contractors, with approximately 1,825 staff implementing the program in the field. PG&E's ESA Program implementation subcontractors hire most in-home workers from the communities in which they will be working. These ESA Program field personnel bring their local, in-language knowledge to help recruit ESA Program participants from the communities in which they live and work. PG&E's training in ESA home assessment, energy education, weatherization services and measure installation, provides workers with skills and work experience that are transferable to other green jobs.

In compliance with D.12-08-044, OP 9, PG&E submitted a report on February 1, 2013, summarizing data collected from ESA contractors regarding workforce education and training.

Following submission of its ESA contractor workforce education and training report, PG&E participated in the ESA Program Workforce Education and Training (WE&T) Working Group, established in D.12-08-033. The Working Group developed recommendations pertaining to further efforts to collect and track demographic data, and submitted them to the Commission on July 17, 2013. The Commission has not yet addressed this outstanding D.12-08-044 Phase II issue.

In 2014, PG&E ESA Program staff continued to participate in the ongoing Statewide WE&T Team's efforts to respond to the recommendations in the Don Vial Center WE&T Guidance Plan (Guidance Plan). The ESA administrators will take steps to implement the plan—including collecting and reporting relevant data on the ESA workforce—when the plan is addressed and guidance provided by the Commission.

The Stockton Energy Training Center (ETC), has supported training for the ESA Program continuously for over 35 years and is the focal point for substantive integration of the WE&T EE program with ESA Program WE&T efforts. ETC provides training for the weatherization specialists (installation crews); and energy specialists (assessors/educators) that implement PG&E's ESA Program and will continue to train contractors and field staff for the ESA Program. The ETC trained over 678 contractor staff in 2014 to work as Energy Specialists, Weatherization Specialists, Duct Test and Seal technicians, and NGAT technicians in the ESA Program. Each of the students attending sessions at the ETC were hired by a participating contractor prior to attending.

During the 2012-2014 ESA program cycle, PG&E continues to work with the non-profit Rising Sun Energy Center in Berkeley to develop and implement a low income workforce education and training pilot. The first use of the PG&E provided training material will begin in April 2014. Graduates of the Rising Sun program will be given credit for 4 days of the 8 day Energy Specialist certification class. In addition PG&E will continue to work with Energy Division, Rising Sun and others to develop training curriculum and certifications acceptable for delivering ESA Program services.

In support of WE&T statewide ESA training standardization efforts, the four utilities sent representatives to each of their respective classes in 2013. Based on this effort, class length and content is currently under evaluation with potential changes to take place in the 2015 program year.

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

ESA Training conducted at the ETC in 2014 is shown in the following table:

**Table 1.8.2: 2014 ESA Program Training**

Type of training or recruitment Conducted	Length of Training	2014 Employees trained	Student Days
Energy Specialists (ES) Certification Training	8 day	255	2040
Weatherization Specialist (WS) Training	3 day	193	579
Returning Crew Certification	1 day	19	19
NGAT Training	6 day	100	600
ES & WS Combined Certification Training	10 day	15	150
Customer Quality Specialist (CQS) Training	4 day	11	44
Duct Testing & Sealing	1 day	85	85

ESA contractors were responsible for recruiting employees to implement the ESA Program. Contractors typically recruited and hired within their respective local communities, helping provide greater program awareness and acceptance within the communities served by the ESA contractor. These ESA Program field personnel bring their local, in-language knowledge and community ties to help locate and enroll ESA Program participants from the communities in which they live and work.

Some of the techniques used by ESA Program contractors to recruit potential employees include the following:

- Placing ads on Craig's List and other similar on-line sites
- Advertising in local newspapers
- Recruiting ESA program participants who express an interest in being an Energy or Weatherization Specialist
- Word of mouth within their respective communities

## **1.9. Legislative Lighting Requirements Status**

- 1.9.1.** Provide a summary on current and future compact fluorescent lamp (CFL) supply issues, as experienced by the IOU. Any current/future problems as well as potential solutions should be discussed in this paragraph.

In 2014, PG&E provided low income customers participating in the ESA program up to five (5) free CFLs. There were no significant supply issues in the program in 2014.

- 1.9.2.** Provide a summary explaining how IOU promotes the recycling/ collection rules for CFLs.

PG&E continued to provide a CFL Recycling fact sheet to all ESA Program participants in 2014. This was provided and discussed by the ESA Program Energy Specialist during the energy education/energy assessment home visit. The fact sheet explains what mercury is and why it is harmful to people and the environment and describes safe removal and storage of CFLs, safe disposal of used CFLs and what to do when a CFL breaks. Currently, ENERGY STAR® requires manufacturers to print a CFL recycling resource website on CFL packages. Safe CFL recycling practices are also covered during ESA Program contractor training modules.

In addition to the providing the CFL Recycling fact sheet through the ESA Program in 2014, PG&E's energy efficiency programs continued to work through various local government partnerships to promote CFL recycling and collection rules.

In collaboration with local governments as part of its Green Communities program, PG&E launched a Fluorescent Lamp Recycling Outreach and Marketing (FLR) Program in 2011 for the proper disposal of fluorescent lamps for residential customers. This sub-program provided a standard menu of marketing, education and outreach tools to local governments to educate their residents about the necessity and options for appropriately recycling fluorescent lamps to protect public health and the environment. Additionally, the FLR Program provides resources to assist local governments with actual implementation of fluorescent lamp collection infrastructure, such as recycling kits.

In addition to fluorescent lamp recycling, the Green Communities program collaborated with Alameda County StopWaste.Org to develop engaging and consistent marketing and branding materials to message the importance of proper disposal of fluorescent lamps. The program developed designs for web badges, posters, newspaper ads, shelf-talkers and counter-cards, bill inserts, school handouts and a variety of elements that make up a toolkit for any local government interested in launching their own fluorescent lamp recycling program. These free marketing and outreach templates are available to all local governments on the PG&E website at [www.pge.com/sustainablecommunities](http://www.pge.com/sustainablecommunities) and are customizable for any city and county that wants to communicate about collection locations. Several counties use these materials in their outreach with the goal of establishing a recognizable and actionable message to residents disposing of fluorescent bulbs.

In 2012, PG&E's Residential Upstream Lighting programs began supporting LEDs in addition to CFLs. In 2014, PG&E emphasized LEDs in our energy efficiency programs, even though CFLs and proper CFL recycling continued to be a large component in terms of volume.

- 1.9.3.** Complete Table 15 (in Appendix). In addition, please briefly summarize the CFL procurement process for the IOU, including manufacturers, distributors, warehousing, and contractor delivery.

During the 2014 program year, ESA Program Contractors directly purchased CFLs and other lighting products used in the program.

## **1.10. Studies**

- 1.10.1.** For each Study, provide (1) a summary describing the activities undertaken in the study since its inception; (2) the study progress, problems encountered, ideas on solutions; and (3) the activities anticipated in the next quarter and the next year.

Four statewide studies were authorized for the 2012-2014 ESA Program cycle. These included: (1) an impact evaluation of the 2011 ESA Program; (2) an ESA energy education study; (3) a low income needs assessment study; and (4) a low income multifamily segment study. Each of these is described below.

D.12-08-044 (the decision authorizing these four studies) was adopted at the end of August 2012. Consultants for each study were selected through bid processes conducted during the last quarter of 2012. Contracts were awarded and work on each study began in the first quarter of 2013.

All studies were completed in 2013, in time to be used to inform the 2015-2017 ESA program applications that were filed on November 18, 2014. The delay in the issuance of d.12-08-044, combined with the logistics and technical requirements required to execute each of the studies according to the objectives outlined in the decision, posed some challenges for each of the studies given the budgets allocated and their extremely aggressive schedules. Table 1.10.2 (directly below) provides an overview of the 2012-2014 studies, and a more expansive description of each study is provided further below.

**TABLE 1.10.2: 2012-2014 ESA PROGRAM STUDIES**

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

#### **Joint Utility<sup>5</sup> Low Income Multifamily (MF) Segment Study**

PG&E was the contract manager for the MF Segment Study. The research contractor for this study was The Cadmus Group.

The central goal of the Multifamily Segment Study was to develop market segment profile information to investigate promising comprehensive multifamily segment strategies for the ESA Program to help develop and advance long-term plans to meet the needs of low income customers living in California multifamily housing as either owners or renters.

There were six key activities in this Study designed to meet the Decision's research objectives:

1. Gather California multifamily housing data relevant for low income customer programs.
2. Catalog existing multifamily energy efficiency programs relevant for low income customers.
3. Review and evaluate multifamily programs and research relevant for low income customers.
4. Identify and assess alternative program designs and delivery strategies.
5. Identify financing and funding options.
6. Solicit Public comment at key decision points.

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

The study findings included the following. Statewide, 30% of all California residential households qualify for the ESA Program; low income multifamily households represent approximately 9% of total California

<sup>5</sup> The Joint Utilities are PG&E, Southern California Edison Company (SCE), Southern California Gas Company (SCG), and San Diego Gas and Electric Company (SDG&E).

residential households. Seven percent of these low income multifamily households live in market-rate buildings, 2% in affordable housing, and less than one percent own their unit. Changing the focus to *all* low income households, the study found that 32% of low income households reside in multifamily buildings with five or more units. The percentage of low income multifamily households varies across the four IOUs, ranging from 39% to 27%. Furthermore, when viewed across the spectrum of all California *multifamily* households, 42% qualify as low income.

This study focused on the needs and issues of multifamily property owners and operators in their role as the ultimate decision-makers responsible for program participation in a whole building approach. This focus was a response to the Decision directive to explore a whole building approach.

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

A public workshop to discuss the Research Plan was held on March 5, 2013 in San Francisco. Two additional workshops were held to solicit public comments on the preliminary results (September 25, 2013) and the draft report (November 13, 2013). The Final Report was issued and posted on December 4, 2013. The Joint Utilities will use the results from this study in developing the 2015-2017 ESA Program Applications.

### **Joint Utility ESA Energy Education Study**

The prime research contractor for the energy education study was Hiner and Partners with KEMA as a subcontractor; SCE was the contract manager.

The overall purpose of the Energy Education Study was to identify ways to optimize and/or improve the educational component of the program. Along these lines, the two primary objectives of the Energy Education Study were to find improvement opportunities concerning: (1) how energy education is provided, and (2) what materials and content are provided. The study examined both current and potential practices best practices across the IOUs and comparable efforts done elsewhere to inform potential improvements to this component of the program.

Overall, the study found that energy education as delivered through the ESA Program's assessment process assisted participants by providing information that helped them save money on their energy bill and addressed some of the barriers to reducing energy consumption in their homes.

In terms of overall delivery of the education component, the study found that the interactive customer specific delivery process is effective and follows best practices. In addition, assessor recruitment, selection, and retention processes as well as training were reported to be largely effective; though varied across the IOUs. Recommendations for potential improvements were offered around the use of some of the 'best practices' that may be adopted across the joint utilities. In addition, the study found that the benefits of the education component are such that it may be prudent to support the provision of education at the time of the assessment even if the home does not qualify for other measures.

Regarding educational content, the study found that while the materials were relatively comprehensive, some suggestions for modifications and improvements were offered. Most notably, the study found

that customers reported seeking more information on specific and practical appliance cost of use information.

The final study results were presented at a public workshop on October 17, 2013. The final report was issued and posted on October 31, 2013. PG&E used the results from this study in developing our 2015 2017 ESA Program Application.

### **Joint Utility Low Income Needs Assessment Study**

The Low Income Needs Assessment (LINA) Study was a statewide study managed by SCE. Evergreen Economics was the research contractor.

The previous low income needs assessment study was completed over five years ago and was based on data collected nearly 10 years ago.

The overall study objective for the 2013 study was to provide information on the needs of the low-income customers eligible for ESA and CARE. In particular, the study was expected to: report estimates of eligible households; update remaining energy savings potential; assess customer perceptions and accessibility of the programs along with willingness and barriers to participate; assess energy burden and insecurity; and identify energy-related needs and non-energy benefits.

The study's key findings included the following:

- Roughly 32% of California IOU households are eligible for CARE and ESA. Of these, 95% were enrolled in CARE as of the end of 2012,<sup>6</sup> and 59% of eligible households have been treated by ESA.
- Both the CARE and ESA Programs have been effectively reaching households in areas with key markets in need. The programs have been less successful reaching areas with more renters, extreme poverty and higher energy usage.
- Key barriers to ESA participation include: lack of customer trusting of contractors; difficulty getting the landlord's approval for rental customers to participate; customers having to be home for appointments; and homes not needing measures or services the program offers. The requirement to provide income documents was not found to be a barrier.
- Roughly 52% of non-participants are willing to participate in ESA. This is significantly less than was estimated by the previous Needs Assessment (95%).
- The mean energy burden is estimated at 8%.<sup>7</sup> This is statistically unchanged from 2005 data collected for the prior Needs Assessment study.
- Single-family renters have greater energy-related needs and barriers to participation than single-family homeowners and multi-family dwellers.
- The average CARE customer saves \$29 per month (33% savings) on their electric bill and \$6 per month (18% savings) on their gas bill.
- 81% of ESA participants reported noticing a reduction in their energy bills, and between 44 to 64% reported noticing improvements in health, comfort, and safety.
- Customers reported that HVAC and weatherization measures are more likely to generate savings and improvements in health, comfort, and safety. The next most beneficial measure reported was a refrigerator.

<sup>6</sup> As the IOUs increase post-enrollment verification, the penetration rate is going down as more households are removed from the program.

<sup>7</sup> Based on taking the mean of customer-level ratios of energy burden.

The final study results were presented at a public workshop on December 3, 2013. The final report was issued in three volumes and posted on December 16, 2013. PG&E used the results from this study in developing our 2015 2017 ESA Program Application.

### **Joint Utility 2011 ESA Program Impact Evaluation**

The Impact Evaluation was a statewide study managed by SDG&E. The prime research contractor for the 2011 ESA Program Impact evaluation was Evergreen Economics.

The primary objective of this evaluation was to estimate first-year electric and gas savings and coincident peak demand reduction attributable to the 2011 ESA program. The results are used to quantify the 2011 program achievements, document the relative value of various measures in producing energy savings, produce savings forecasts, and meet filing and reporting requirements (including informing the development of the 2015-2017 ESA Program Application).

The methodology used in the study was a fixed effects billing regression model. Savings estimates were developed at the measure and household level. The study also conducted a customer phone survey of 602 participants whose billing data indicated increased usage in the period directly after program intervention.

In an effort to find the best fit, various model specifications were used in the analysis. The final measure-level estimate values were chosen based on whether or not the ex-ante value fell within the resulting 95 percent confidence interval of the impact estimate; if not, evaluator judgment was used to assign a value from either an alternate model or the ex-ante value.

The impact study found that savings from the ESA Program measures was a small fraction of overall household energy consumption and that a significant number of ESA participant households are actually using more energy after their participation in the ESA Program. Evergreen Economics posited that customers may be unaware that they are using more energy.

The final impact estimates were generally consistent with the ex ante savings values, although there is some deviation from the previous evaluation and from DEER values. Some natural variation across years was expected due to a variety of factors, including weather, measure mix and participant demographics.

The final study results were presented at a public workshop on August 7, 2013. The final report was issued in two volumes and posted on August 30, 2013. PG&E used the results from this study in developing our 2015 2017 ESA Program Application.

- 1.10.2.** If applicable, submit Final Study Report describing: (1) overview of study; (2) budget spent vs. authorized budget; (3) final results of study; and (4) recommendations.

All four Statewide Joint IOU studies were completed in 2013 and final reports are available at [www.energydataweb.com](http://www.energydataweb.com) as well as [www.calmac.org](http://www.calmac.org). Budgets spent compared to authorized budgets are included in Table 1.10.3.

**TABLE 1.10.3: 2012-2014 ESA PROGRAM STUDIES:  
AUTHORIZED VS. EXPENSED BUDGETS**

ESA Program Study	Lead Consultant	Managing Utility	Budget Authorized <sup>1</sup>	Budget Expensed	%
ESA Multifamily Segment Study	The Cadmus Group, Inc.	PG&E	\$400,000	\$399,340	100%
ESA Energy Education Study	Hiner & Partners, Inc.	SCE	\$300,000	\$243,427	81%
Low Income Needs Assessment Study	Evergreen Economics	SCE	\$700,000	\$699,997	100%
ESA PY2011 Impact Evaluation	Evergreen Economics	SDG&E	\$600,000	\$489,364	82%

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

#### **1.11. Pilots**

**1.11.1.** For each Pilot, provide (1) a summary describing the activities undertaken in the study since its inception; (2) the study progress, problems encountered, ideas on solutions; (3) the activities anticipated in the next quarter and the next year; and (4) status of Pilot Evaluation Plan (PEP).

No ESA Program pilots were authorized for the 2012-2014 program cycle.

**1.11.2.** If applicable, submit Final Pilot Report describing: (1) overview of pilot; (2) description of PEP; (3) budget spent vs. authorized budget; (4) final results of pilot (including effectiveness of the program, increased customer enrollments or enhanced program energy savings); and (5) recommendations.

No ESA Program pilots were authorized for the 2012-2014 program cycle.

#### **1.12. "Add Back" Measures**

For measures that fall below the cost effectiveness threshold under D.12-08-044, we require additional reporting to show the cost, energy savings impacts, and related metrics, per D.12-08-044, OP 38b.

**1.12.1.** If the "add-backs" compromise the IOUs' ability to meet the 2020 Plan goal that 100 percent of eligible and willing customers will have received all cost effective ESA Program measures, how does the IOU propose to address the shortfall in other parts of the ESA Program?

PG&E's 2014 ESA Program ensured installation of the measures based on the current cost effectiveness framework, with continued focus on the measures that met the 0.25 standard, in compliance with D.12-



08-044, OP 36. Nevertheless, some measures with cost effectiveness scores below the adopted threshold were “added-back” into PG&E’s ESA Program, either at PG&E’s request or the Commission’s. PG&E’s add-back measures for 2012-2014 were determined by Appendix H.1 and Appendix H.2 in D.12-08-044. Add-back measures are measures having cost effectiveness scores below 0.25 in the Utility Cost Test and/or the Modified Participant Cost Test.<sup>8</sup> Add-backs include both measures requested by PG&E and included in its 2012-2014 ESA budget application, as well as measures ordered through D.12-08-044 that were not included in PG&E’s budget application.

The add-back measure expenditures (\$17,507,112) comprised 14 percent of PG&E’s total \$125,799,039 ESA measure expenditure in 2014 and are well within the program’s approved budget. Installation of add-back measures in 2014 did not compromise PG&E’s ability to meet the 2020 Plan goal that 100 percent of eligible and willing customers will have received all cost effective ESA Program measures. See Table 16 – Add Back Measures and Table 2 – Expenses and Energy Savings by Measures Installed.

### **1.13. Low Income Working Groups**

D.12-08-044 authorized Energy Division to form three Working Groups during the 2012-2014 program cycle: (a) the Energy Savings Assistance Program Cost-effectiveness Working Group, (b) the Energy Savings Assistance Program Workforce, Education and Training Working Group, and (c) the Mid-Cycle Working Group to review those components of the Commission’s Energy Savings Assistance Program and California Alternate Rates for Energy Programs to make recommendations for refinements to improve, wherever possible, the design, administration, delivery and ultimate success of these programs.

PG&E staff participated in each of the three Working Groups, which submitted final reports and sunsetted in 2013. There was no new Working Group activity in 2014, although PG&E used the Working Group recommendations in 2014 to prepare its 2015-2017 ESA and CARE Program Applications. Following is a summary describing PG&E’s participation in each Working Group.

#### **ESA Program Cost Effectiveness Working Group**

In 2013, PG&E participated in the ESA Program Cost Effectiveness Working Group. The Working Group submitted a White Paper to the Commission with cost effectiveness recommendations on February 14, 2013. Following further research, the Working Group submitted an Addendum on July 15, 2013. The Working Group recommended using a new program-level ESA Cost Effectiveness Test (“ESACET”) as well as a Resource Measure TRC to assess cost effectiveness for the ESA Program and determine approval, although they did not resolve what specific cost effectiveness thresholds to use for the ESA Program, or an appropriate adder value for NEBs.

In 2014, PG&E used the two new tests to assess cost effectiveness of the ESA Program proposed in its 2015-2017 ESA Application, submitted on November 18, 2014.

#### **ESA Program Workforce Education and Training Working Group**

In 2013, PG&E participated in the ESA Program Workforce Education and Training (WE&T) Working Group, established in D.12-08-033. Between November 15, 2012 and July 15, 2013 the WE&T Working Group convened a total of ten meetings. The Working Group evaluated workforce data gathered by the

<sup>8</sup> Previously existing ESA measures only had to pass the cost effectiveness threshold of 0.25 for one test; new measures proposed to be added into the 2012-2014 had to pass the threshold for *both* tests.

IOUs from their ESA Program contractors and reported by the IOUs in compliance with D.12-08-044. The Working Group developed a list of researchable questions and recommendations pertaining to collecting and tracking demographic data and submitted them to the Commission on July 17, 2013.

### **Mid-Cycle Working Group**

In 2013, PG&E participated in the Mid-Cycle Working Group. The Working Group met 15 times, and hosted one public workshop to solicit input on the proposed updates and revisions to the two ESA Program Manuals: the Statewide ESA Program Policy and Procedures (P&P) Manual, and the California ESA Program Installation Standards Manual. On February 15, 2013, the Working Group submitted a Progress Report to the Commission including redlined updates to the P&P Manual. On July 15, 2013, the Working Group submitted its Final Report, including a summary of the Final P&P Manual Updates, and a summary of proposed updates to the California Installation Standards Manual.

#### **1.14. Annual Public ESA-CARE Meeting**

D.12-08-044 ordered the IOUs to convene a minimum of one public meeting per year, within 60 days of their filing of the annual report, and other public meetings as deemed necessary by the IOUs, the Energy Division, the ALJ, or the Commission. Additionally, IOUs were directed to use these meetings as a forum to host the working groups.

In compliance with D.12-08-044, PG&E and the other IOUs held a public forum in San Ramon on June 3, 2013. The IOUs presented an overview of 2013 ESA and CARE results, and discussed the Proposed Decision and Guidance Document for the 2015-2017 ESA-CARE Program cycle.

#### **Public Meetings for the 2015-2017 ESA-CARE Program Application**

PG&E held a public meeting in San Francisco on October 7, 2014 to discuss plans for the 2015-2017 ESA-CARE Program cycle. (A public meeting previously scheduled for May 20, 2014 was postponed when the July 1, 2014 Application filing date was extended by the Assigned Commissioner Ruling Extending the Deadline for Filing the ESA and CARE Program Application for 2015-2017, dated June 16, 2014.) In addition to the public meeting, PG&E held multiple meetings during 2014 with individual stakeholders and contractors to solicit ideas and input.

## CALIFORNIA ALTERNATE RATES FOR ENERGY PROGRAM

### 2. California Alternate Rates for Energy (CARE) Program

The CARE program provides a monthly discount on energy bills for qualifying residential single-family households, tenants of sub-metered residential facilities, nonprofit group living facilities, agricultural employee housing facilities and migrant farm worker housing centers throughout PG&E's service area.

The CARE program was originally referred to as the Low Income Rate Assistance (LIRA) Program, as authorized in D.89-07-062 and D.89-09-044 by the CPUC on November 1, 1989, to provide a 15 percent discount on energy rates to residential households with income at or below 150 percent of the Federal Poverty Guidelines. The program name was later changed from LIRA to CARE as authorized in D.92-04-024.

In D.01-06-010 and D.02-01-040, the CPUC authorized an increase in CARE eligibility from 150 percent to 175 percent of Federal Poverty Guidelines (FPG) and the rate discount from 15 percent to 20 percent. The CARE eligibility level was later increased to 200 percent of the FPG in D.05-10-044.

D.12-08-044, issued on August 30, 2012, adopted the 2012-2014 CARE Program. General Rate Case D.14-08-032 issued on August 14, 2014 approved employee benefit costs for 2014-2016. For the 2014 program and activities, the authorized administrative budget was \$15,790,513 which included \$134,904 for PG&E's Cooling Centers Program and \$222,491 for Community Help and Awareness with Natural Gas and Electricity Services (CHANGES) Pilot Program per D.12-12-011.

D.12-12-011 approved continued funding of the CHANGES Pilot Program through the CARE Outreach budget at the current statewide funding level of \$60,000 a month until the end of 2014. PG&E is responsible for 30%, or \$18,000 a month, of the Joint Utility pilot program cost. The CHANGES Pilot Program provides funding to Community Based Organizations (CBOs) to assist Limited English Proficient (LEP) customers with energy education and billing issues.

The CHANGES Pilot Program adopted new reporting procedures for PG&E and other investor-owned utilities to report expenditures, and evaluate individual cases and group workshops/presentations conducted by community based organizations. The new reporting requirements are included in CARE Tables 9, 10 and 11 in the monthly filed ESA/CARE reports.

Assembly Bill (AB) 327 (Perea 2013) revised Public Utilities Code Section 739.1. (a) to require that the CARE income eligibility level for one-person households to be based on two-person household guideline levels effective January 1, 2014. AB 327 also establishes that the CARE electric discount be no less than 30 percent and no greater than 35 percent of revenue.

#### 2.1. Participant Information

- 2.1.1.** Provide the total number of residential CARE customers, including sub-metered tenants, by month, by energy source, for the reporting period and explain any variances of five percent or more in the number of participants.

See CARE-Table 8 – Participants per Month.

During the 2014 program year, no monthly variances of five percent or more occurred.

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

PG&E and the other California IOUs used the joint utility methodology adopted by the CPUC in D.01-03-028 for developing monthly penetration estimates in 2014. This method entails annual estimation of eligibility for CARE, ESA, and other income-by-household size parameters at the small area (block group, census tract, ZIP+2, etc.) for each IOU territory and for the state as a whole.

The most recent important change affecting the eligibility estimates was the passage of AB 327, which combined the income limits for one- and two-person households, effective January 1, 2014. The requirements for 2014 eligibility, corresponding to the current estimation, again used the January Health and Human Services (HHS) Poverty Guidelines [Federal Register /Vol. 79, No. 14 /Wednesday, January 22, 2014 /Notices; p.593], but returned to "bundling" one- and two-person households at the HHS-defined 200% FPG limit. This difference in treatment of one-person households restores approximately two percent to the eligibility that would have been estimated if the separate HHS limits approach had been retained.

Sources for the estimation include the current HHS guidelines, current year small area vendor marginal distributions on household characteristics, Census Public Use Microdata Sample (PUMS) 2010 and PUMS 2008-2011 survey data, utility meter and master meter household counts, Department of Finance Consumer Price Index series, and various Geographic Information System sources. An important change has been implemented since 2011, which involves adjusting small area (block group) income distributions to match the latest American Community Survey distributions at the Public Use Microdata Area.

Estimates from the block group level are aggregated to county/utility and whole utility level, among other aggregations. Annually, PG&E applies county/utility level eligibility fractions to a new set of "technical eligibility counts" (for CARE these are metered and sub-metered occupied housing units) obtaining an estimate of income/demographic eligibility in household count form.

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

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

In 2009, the method was augmented to better incorporate the impact of labor force changes (unemployment and other forms of job separation, as well as positive changes that are expected to occur in California subsequent to the recession). The method adjusted block group marginal distributions on household income based on sub-state modeling that incorporated Current Population Survey, Integrated Public Use Microdata Survey data, American Community Survey Data, and California Employment Development Department county and Metropolitan Statistical Area level labor force series. This adjustment to block group income marginal is then incorporated into the otherwise "standard" estimation approach to produce small area estimates reflecting small area income changes due to labor market forces.

In 2012, Athens developed an improved method for estimation of payer status-specific eligibility. This method took into consideration American Community Survey microdata relationships between guideline status (above/below 200 percent FPG), tenure, and fuel payment relationships. These

cross-classifications are fitted to small area (block group) marginal to produce payer-type specific distributions, which can be aggregated to various other geographical levels.

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

The joint utility methodology, as described above, was used throughout 2014.

- 2.1.2.2.** Describe how the estimates of current CARE-eligible meters were derived. Explain how total residential meters were adjusted to reflect CARE-eligible meters (i.e., master meters that are not sub-metered or other residential meter configurations that do not provide residential service.).

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

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

See PG&E’s response above to Section 2.1.2. Note that the methodology is based on estimating small area (block group) level household size by income and householder-age tabulations for the current year and connecting these estimates with small area counts of households that are individually metered or sub-metered. Block group/utility-specific estimates are then disaggregated/aggregated to various geographic levels within a given utility area: zip+2, zip, tract, county, territory, etc. Statewide estimates, regardless of utility boundaries, are also provided at small and large area levels.

- 2.1.2.4.** Describe how current CARE customers were counted.

PG&E runs a monthly report of the billing system for all accounts currently enrolled in CARE. This monthly report incorporates all CARE customer information necessary for reporting, including energy source information (electric, gas, or both) and CARE enrollment and recertification dates.

In the case of sub-metered tenants receiving CARE discounts from their master-metered facilities, PG&E runs a separate monthly report to count the number of sub-metered dwelling units that are flagged as being enrolled in CARE.

- 2.1.2.5.** 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 energy source divided by the estimated eligible CARE population by energy source.

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

Electric-only:	33.3%
Gas-only:	34.9%
Combined electric/gas:	30.1%
Total:	31.5%

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

PG&E estimates that 53,433 electric and 41,278 gas sub-metered tenants were eligible for CARE at year-end.

**2.1.5.** Provide the current CARE sub-metered tenant counts by energy source at year-end.

As of year-end 2014, there were 28,973 electric and 25,090 gas sub-metered tenants enrolled in CARE.

**2.1.6.** Provide the current CARE sub-metered penetration rates by energy source at year-end.

As of year-end 2014, approximately 54 percent of the estimated CARE-eligible sub-metered electric tenants and 61 percent of the estimated CARE-eligible sub-metered gas tenants were enrolled in CARE.

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

To make the CARE program available to eligible tenants of sub-metered residential facilities, PG&E mails information packages containing program applications and posters to landlords/managers annually. However, some of these packages are either returned or undelivered due to the high turnover of landlords/managers. This results in lower new enrollments than expected.

Some landlords/managers were concerned that their CARE-enrolled tenants used more energy than the average tenant in the facility. This resulted in the master-metered customer having to pass on more of a discount than they received from PG&E. In these cases, PG&E explained to the landlord/manager how the sub-metered discount works. If the landlords/managers were not satisfied, PG&E advised the landlords/managers to contact the CPUC or their County's Department of Weights and Measures.

Another problematic issue was the insufficient discount information on the tenant bill from the facility billing agency. For example, the CARE discount might not be shown as a separate line item, making it difficult for the tenant to verify whether they were receiving the discount. When a tenant called PG&E with questions, PG&E confirmed that the tenant was certified for the program and reviewed the bill with the tenant to ensure they were receiving the discount. If it appeared the tenant was not receiving the CARE discount, the tenant was advised to contact their manager or billing agency for further clarification. California Civil Code Section 798.43.1(c) requires that: "The management shall notice the discount on the billing statement of any homeowner or resident who has qualified for the CARE rate schedule as either the itemized amount of the discount or a notation on the statement that the homeowner or resident is receiving the CARE discount on the electric bill, the gas bill, or both the electric and gas bills."

If the tenant did not obtain resolution with their billing agency and/or sub-metered facility manager, PG&E advised the tenant to contact their County's Department of Weights and Measures (DWM). DWM helps tenants with meter reading accuracy/testing, proper meter installation, billing accuracy, and verification of correct rate. If contacting the DWM did not resolve the tenant's billing question, the tenant was advised to file a complaint with the CPUC.

PG&E provides a CARE certification report to landlords/managers at regular intervals. PG&E also requests landlords/managers to contact PG&E when updated information is needed. Nonetheless, some landlords/managers still fail to notify PG&E when a CARE-certified tenant moves out of the facility. In 2014, PG&E observed a continued increase in turnover within Mobile Home Park (MHP) ownership and management. When changes in ownership happened, PG&E worked with the new owners to

transfer existing CARE-certified tenant data to new accounts, and informed them about the CARE Program and the processes involved. When landlords change managers, they often fail to notify PG&E with new contact information which results in undelivered reports and delayed communications.

Many new tenants also did not know about the processing cycle for CARE applications for sub-metered tenants, and called in to complain that their applications had not been processed. PG&E explained it was unable to process their CARE applications until their MHPs' processing cycle date, which was typically six weeks. To improve this process, PG&E built a new database called the CARE One system to replace the old Sub-Metered Access database. The new database improved the processing of tenant applications, shortened the processing cycle from six to four weeks, and allowed PG&E to go paperless as all related reports were saved electronically.

Some tenants move from one MHP to another MHP or from a residential house to a MHP and thought their CARE discount would transfer. PG&E had to explain to them that their CARE discount was not transferable, and advised them to fill out a Sub-Meter application to re-apply for the CARE Program. Some new MHP owners or managers did not know how to calculate electricity and gas discounts for their tenants. PG&E's CARE staff provides high-level information regarding the tiered rate structure or refers them to the billing department for more detailed explanations.

Many MHPs have multiple account numbers or have different account numbers for either electric or gas which causes a great deal of confusion to MHP owners, tenants and CARE staff when enrolling and administering the discount. The owner or the tenant often provides the wrong account number or does not provide all of the applicable account numbers during the enrollment process, resulting in CARE staff mis-certifying or not being able to certify the tenant on all accounts.

## 2.2. CARE Budget Summary

### 2.2.1. Please provide CARE program summary costs.

CARE Budget Categories	Authorized Budget[1]	Actual Expenses[1]	% of Budget Spent
Outreach	\$5,846,455	\$5,635,990	96%
Processing, Certification and Recertification	\$3,961,081	\$1,589,652	40%
Post Enrollment Verification	\$2,097,136	\$1,275,340	61%
Information Technology (IT) Programming	\$735,794	\$1,162,891	158%
Cool Center	\$134,904	\$110,262	82%
CHANGES Pilot Program	\$222,491	\$250,241	112%
Measurement and Evaluation	\$48,000	\$72,684	151%
Regulatory Compliance	\$387,587	\$246,749	64%
General Administration	\$2,229,066	\$1,893,641	85%
CPUC Energy Division Staff	\$128,000	\$44,395	35%
<b>Total Expenses</b>	<b>\$15,790,513</b>	<b>\$12,281,846</b>	<b>78%</b>
<b>Subsidies and Benefits</b>	<b>\$605,950,000</b>	<b>\$607,206,765</b>	<b>100%</b>
<b>Total Program Costs and Discounts</b>	<b>\$621,740,513</b>	<b>\$619,488,611</b>	<b>100%</b>

[1] Program authorized budget per D.14-08-030 and actual expenses have been updated to include employee benefits costs approved in the GRC D.14-08-032

**2.2.2.** Please provide the CARE program penetration rate to date.**CARE Penetration**

Participants Enrolled	Eligible Participants	Penetration rate	Target Met?
1,413,334	1,648,774	86%	No

**2.2.3.** Report the number of customer complaints received (formal or informal, however and wherever received) about their CARE recertification efforts, and the nature of the complaints.

Month	Complaints Received	Nature of Complaint	Cases Resolved
January		n/a	n/a
February		n/a	n/a
March		n/a	n/a
April		n/a	n/a
May		n/a	n/a
June		n/a	n/a
July		n/a	n/a
August		n/a	n/a
September		n/a	n/a
October		n/a	n/a
November		n/a	n/a
December		n/a	n/a

**2.3. CARE Program Costs****2.3.1. Discount Cost****2.3.1.1.** State the average monthly CARE discount received, in dollars, per CARE customer by energy source.

Electric: \$37.54  
Gas: \$6.69

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

Electric: \$522,526,187  
Gas: \$84,680,578  
Total: \$607,206,765



### **2.3.2. Administrative Cost**

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

See CARE-Table 1 – Overall Program Expenses.

#### **2.3.2.2.** Explain what is included in each administrative cost category.

**Outreach:** This cost category includes:

- Marketing and outreach campaigns, such as direct mail, e-mail, telemarketing, AVR, digital media and radio
- Printing of bill inserts, applications, advertising and promotional materials, annual notifications to Sub-metered facilities (SB 920), and other CARE Program materials.
- Postage and handling fees
- Purchase and storage of promotional items, other goods and supplies
- CARE toll-free line maintenance and operation
- Capitation fees to Community Outreach Contractors for new CARE enrollments and assistance with the Post Enrollment Verification process, community event costs, community outreach activities and partnerships
- Staff labor related to marketing and outreach
- Other expenses include travel, membership fees, sponsorships, conferences, catering and other outreach-related costs

**Processing, Certification and Recertification:** This cost category encompasses day-to-day administrative tasks associated with processing CARE applications, including:

- Opening, sorting, scanning, processing, and data entry of CARE applications
- Initiating and responding to customers' inquiries by mail, e-mail or phone regarding Program participation
- Resolving billing issues related to Program enrollment
- Tracking CARE enrollment and recertification statistics in support of operations, management and regulatory
- Training and other related costs

**Post Enrollment Verification (PEV):** This cost category encompasses day-to-day administrative tasks associated with completing PEV and High Usage verifications, including the following:

- Opening, sorting, scanning, data entry and processing of CARE PEV and High Usage correspondences
- Initiating and responding to customers' inquiries by mail, e-mail or phone regarding the PEV and High Usage process
- Resolving billing issues
- Tracking CARE PEV and High Usage statistics in support of operations, management and regulatory support
- Training and other related costs

**IT Programming:** This category includes:

- Ongoing software enhancements and licensing for PG&E's current technology supporting CARE Program activities
- Routine and non-routine system maintenance
- Automated CARE enrollment internal data exchanges among CARE, ESA, REACH and LIHEAP Programs
- External data exchanges with IOUs, municipalities and water utilities
- Data reporting and analysis
- CARE system enhancement and maintenance
- Online applications enhancement and maintenance
- Website and IVR enhancement and maintenance
- Other IT-related obligations

**Cooling Centers:** This cost category encompasses day-to-day administrative tasks associated with operating cooling centers, including:

- Direct funding to cooling centers/program administrators
- Printing of bill insert, brochures and other materials
- PG&E's Cooling Centers website and toll-free line maintenance and support
- Staff labor
- Travel expenses and other program management related costs

**Pilots:** This cost category includes any pilot projects for the program. For 2014, this includes the annual budget for the CHANGES Pilot Program and staff labor to support the pilot.

**Measurement & Evaluation:** This cost category includes all measurement and evaluation related to the CARE Program, including contract expenses for the annual study of CARE customer eligibility estimates and other studies where appropriate.

**Regulatory Compliance:** This category includes costs for staff labor and travel expenses associated with preparing regulatory filings, including:

- Program applications
- Advice letters
- Tariff revisions, comments and reply comments
- Hearings
- Preparation of regulatory compliance reports
- Preparation of data request responses
- Attendance at working group sessions, public input meetings and public workshops
- Travel expenses and other related costs

**General Administration:** This category includes:

- Program management labor
- Retention outreach and pre-notifications of any CARE rate changes (AB 327)
- Office supplies and equipment
- Envelopes and printing of CARE letters
- Customer research
- Propensity model costs

- Other expenses include training, travel, membership fees, sponsorships, conferences, catering and other administrative-related costs

**CPUC Energy Division Staff:** This cost category includes funding for Energy Division staff.

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

The year-end December 31, 2014 balance for the CARE balancing accounts (electric and gas) was over-collected and reflects a year-end credit balance of \$42,544,396.

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

D.02-09-021 authorized the recording of all CARE administrative costs as well as the revenue shortfall associated with the CARE discount in the CARE balancing account.

**2.3.5.** Provide a table showing, by customer class, the CARE surcharge paid, the average bill paid, the percentage of CARE surcharge paid relative to the average bill, the total CARE surcharge collected, and the percentage of total CARE revenues paid.

See CARE-Table 10 – CARE Surcharge & Revenue.

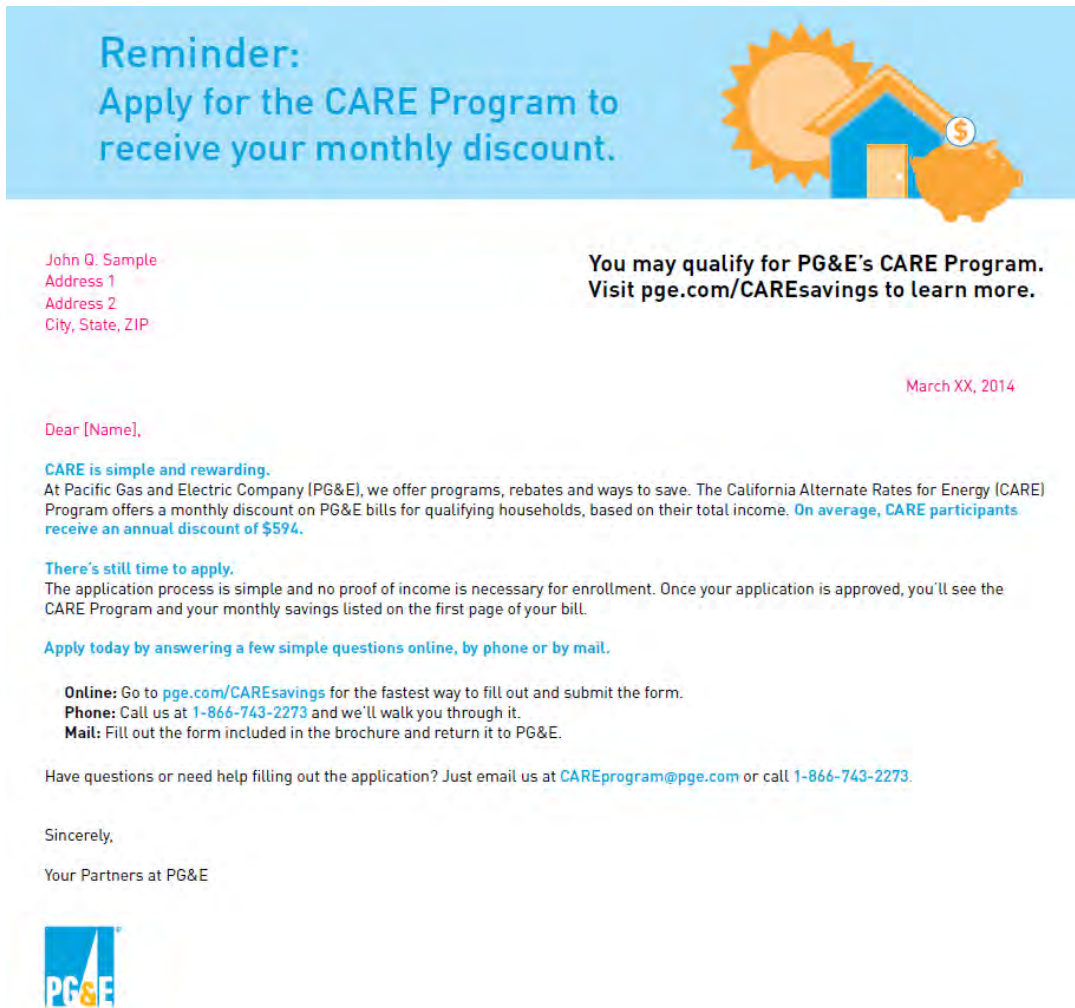
## **2.4. Outreach**

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

During 2014, PG&E launched several multi-touch acquisition campaigns. These efforts included direct mail, email, automated voice messaging and telemarketing. As well as targeting customers with a high propensity for eligibility and those who participated in the program earlier in the year but did not recertify. Throughout these efforts, PG&E continued to evaluate different channels, language and design. Also, identifying optimization opportunities and implementing learnings in real time for improved results, efficiency and cost-effectiveness.

PG&E launched the first wave of acquisition emails, direct mail and automated voice messaging outreach through March and April. The emails garnered a 27% open rate with a 5% unique click-thru rate above industry average. Moreover, the emails targeting those who did not recertify garnered an unprecedented 41% open rate with a 13% click-through rate, above industry average. Overall the email generated close to 7,500 new enrollments with a 2.2% response rate and the direct mail generated close to 13,000 new enrollments with a 2.6% response rate.


Sample direct mail creative:




In July, PG&E launched the second wave of acquisition email, direct mail and automated voice messaging outreach through September. Results show that emails have generated an overall 40% open rate with a 7% unique click-thru rate, above industry average. Overall the email generated over 9,300 new enrollments with a 1.8% response rate and the direct mail generated close to 22,000 new enrollments with a 2.4% response rate.


Sample email creative:

Need help paying hot weather energy bills? [Download Pictures](#) Ver en [español](#)




## Apply for the CARE Program to receive a monthly discount.

[Apply Now >](#)




### We're here to help you save.

At Pacific Gas and Electric Company (PG&E), we understand that financial challenges can happen to anyone, at any time. The California Alternate Rates for Energy (CARE) Program is just one more way we can help you save. **Nearly 1.4 million customers already benefit from the CARE discount.** Apply today to begin receiving your monthly discount.



### CARE is simple and rewarding.


The CARE Program offers a significant monthly discount on PG&E bills for qualifying households, based on the total income of everyone living in the home. Once your application is approved, you'll begin receiving your monthly discount within two billing cycles.



### Getting started is easy.

You're likely to qualify for CARE. For specific details, requirements and program benefits, visit [pge.com/care](http://pge.com/care). Make sure to have your PG&E account number handy. Apply today by answering a few simple questions. No proof of income is necessary for enrollment.

[Apply Now >](#)



You can also help family, friends and neighbors who may qualify by telling them about the CARE Program. [Share the details >](#)

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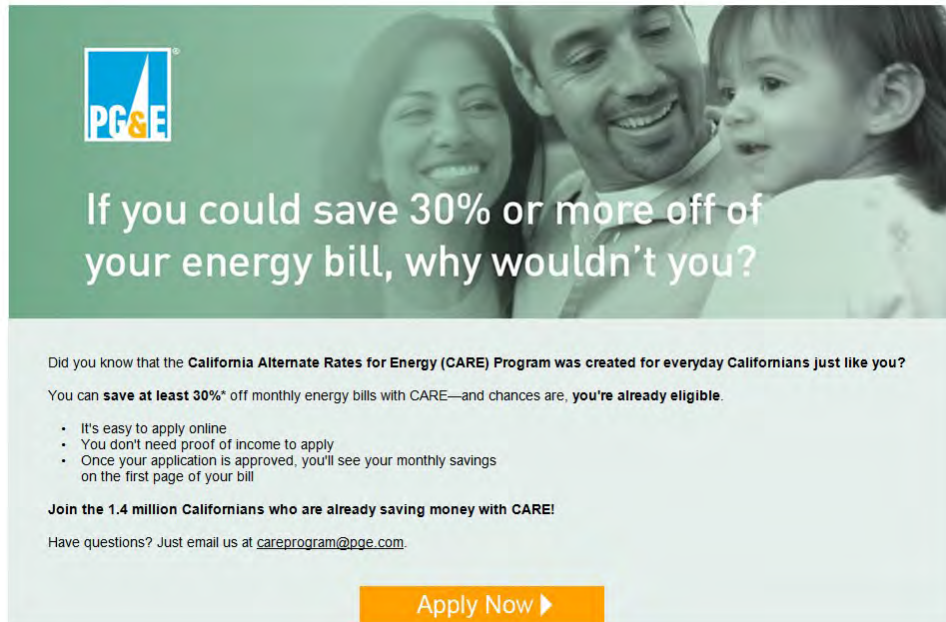
To be removed from this email list, please click to [unsubscribe](#) to send an email to Pacific Gas and Electric Company.

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In October, PG&E launched the third wave of acquisition email, direct mail and automated voice messaging outreach through December. To increase our response rates for email, PG&E conducted an email message test to better understand how we can leverage our messaging to break down identified barriers to participation. Results show that email have generated an overall 24% open rate with a 4% unique click-thru rate, above industry standards. Initial results show that the campaign yielded close to 13,000 new enrollments in its three-month duration. However, we anticipate more enrollments coming in through the beginning of the 2015 as well.

## Sample email creative:



PG&E tested telemarketing from September to November to determine if it is a viable channel to further enroll customers into the CARE Program. We reached out to seniors and those customers who previously received an email in 2014 but never responded for our initial test. Overall the telemarketing test generated close to 3,250 new enrollments with a 7.9% response rate.

Additionally, PG&E inserted the CARE Program application in customers' monthly bill packages four times throughout the year in June, September, October and November. This yielded close to 21,250 new enrollments.

## Sample bill insert:



## Digital and Social Media

During the second half of 2014, PG&E added digital advertising to the marketing mix, with special focus on Spanish- and Chinese-speaking audiences, testing this channel's impact on awareness and acquisition. Due to its success, we continued digital ad and online search campaign throughout 2014, updating the creative mid-year.

Its main focus continues to be on Spanish- and Chinese-speaking audiences, though it's also displayed on English sites. It is continuously optimized to ensure presence of top performing creative on the most effective sites. The digital advertising has generated over 103 million impressions and a 0.8% click rate, more than the 0.06% industry benchmark.



Sample digital creative:



PG&E also leveraged its social media channels for the first time to spread awareness about the CARE Program. PG&E tested messaging on Chief Customer Officer Helen Burt's Twitter account in which customers were encouraged to share program information or a customer story with someone who needs help with their PG&E bill. The initial results showed the online community was very engaged, with nearly 1,000 clicks and 50 shares or retweets in total.

Social media creative:



## Paid & Earned Media

In February, a testimonial ad featuring the Vega Family (CARE participants from Bakersfield, CA) was published in Focus Forward magazine – a Fresno area publication with uplifting personal stories. This magazine was distributed over the course of the year in events, to local businesses, medical facilities, mentoring programs for youth in the juvenile justice system and in youth employment programs through the Workforce Investment Board. PG&E also published a Chinese advertorial promoting CARE and ESA in Sina.com and World Journal.

**Save on monthly energy bills with the CARE Program**

When you have eight growing children, it's hard enough to make ends meet. It was even harder after Mr. Vega was laid off.

The Vega family was relieved to learn how the CARE Program can help them save money on their energy bills during challenging times. See their story and learn how CARE can help you too at [pgandethevegas.com](http://pgandethevegas.com).

"Our bills are stacking fast. Everything seems to pile up and there's nothing coming in... The CARE Program sounded good to me and I was quick to say 'yes!'"

The Vega Family (Bakersfield, CA) CARE Customer

**We're here to help you save**

At Pacific Gas and Electric Company (PG&E), we offer programs, rebates and ways to save, because sometimes our customers need a little assistance. We understand that financial challenges can happen to anyone, at any time. The CARE Program is just one more way we can help you save. PG&E has helped over 1.4 million households save on their energy bills with CARE.

**Why should you sign up?**

The California Alternate Rate for Energy (CARE) Program offers a discount on monthly energy bills for income-qualified households. Once your application is approved, you'll see the CARE Program and your monthly savings listed on the first page of your bill. On average, CARE participants receive an annual discount of \$596.

**Here's how to get started**

It's quick, easy and safe to enroll. Apply today by answering a few simple questions at [pgandethevegas.com](http://pgandethevegas.com) or call 1-866-745-2273 to learn more about the CARE Program's benefits and requirements. No proof of income is needed for enrollment.

Additionally from May to December, PG&E experimented with radio as a way to reach ethnic audiences through targeted mass channels. We tested various stations to raise awareness for the CARE Program and ESA Program and targeted Spanish speaking audiences in Fresno, Sacramento and San Francisco Bay Area. We had over 6,700 radio spots run throughout 2014.

PG&E continued to participate in radio and television media interviews to promote the CARE Program and ESA Program with the following outlets:

- KFTV Univision's daily morning show *Arriba Valle Central* "Wake Up Central Valley" hosted by Lupita Lomeli, a Hispanic icon in the Central Valley, with coverage in Fresno and Visalia
- Hmong TV Network serving Hmong customers throughout Merced, Mariposa, Madera, Fresno, Tulare and King
- KABE Univision 39 *Bakersfield al Dia* with coverage in the Bakersfield DMA
- KFSO's public affairs show *Servicio a la Comunidad* with coverage in Stanislaus, Merced, Madera, Fresno, Tulare and Kings
- KIQI's community affairs show *Ventana a la Comunidad* with coverage in Marin, Sonoma, Napa, Solano, Contra Costa, Alameda, San Mateo, Santa Clara, San Francisco and Sacramento
- KLOQ Radio Lobo for coverage in Merced and Stanislaus counties
- KTRB ESPN Deportes with coverage in Northern California including San Francisco, Oakland, San Jose, Santa Rosa, Sacramento, Stockton and Modesto
- Radio Bilingue's show *Comunidad Alerta*, part of the Public Radio Network with coverage in Fresno, Modesto, Stockton, Salinas and Mendocino
- Sing Tao Radio offering programs in both Mandarin & Chinese in the San Francisco Bay Area



- Univision Radio's community affairs show *Contacto Comunitario* for coverage in Greater Fresno and Madera, Merced, Visalia, Tulare and Kings counties

## Community Events

During the month of May, PG&E participated in Cinco de Mayo events in Fresno and San Jose to build awareness among Spanish-speaking communities. At the events, PG&E showcased an electric safety demonstration and shared information on public safety, energy efficiency, and financial assistance programs.

PG&E's presence during these events demonstrated that these events were successful at engaging customers in holistic solutions. Thus, PG&E participated in four Hispanic and Chinese community events throughout the month of September. These events were an opportunity to promote the CARE Program and ESA Program through radio endorsements leading up to and at the event as well as through one-on-one outreach.

- On September 6-7, PG&E joined the 24<sup>th</sup> Annual Autumn Moon Festival in San Francisco Chinatown, which had over 100,000 attendees
- On September 14, PG&E held a booth at the Fiestas Patrias Celebration in Placer County Fairgrounds, which had over 12,000 attendees
- On September 20-21, PG&E participated in the 19<sup>th</sup> International Dragon Boat Festival on San Francisco Treasure Island, which had over 80,000 people in attendance
- On September 28, PG&E contributed at the Festival de Sol in Santa Clara

In one month, PG&E activated four events, engaging with over 2,700 customers in Chinese and Spanish, with many bringing energy bills to booths.

Additionally, PG&E made the Integrated Programs brochure, which includes information on the CARE Program and ESA Program, and was available at safety events throughout the month of April as part of National Safe Digging Month. The events were held over the course of four Saturdays in Sacramento, San Jose, Emeryville and Modesto.

## Sample Integrated Programs brochure:

### Three Simple Steps to Energy Bill Savings

1

#### Monthly Discount

##### California Alternate Rates for Energy (CARE) Program

Over 30 percent of PG&E customers have already enrolled in the CARE Program, saving an average of \$565 per year on their energy bills.

Check the chart below to see if you qualify. Apply at [pge.com/CARE](http://pge.com/CARE).

NUMBER OF PERSONS IN HOUSEHOLD	TOTAL COMBINED ANNUAL INCOME	
	CARE*	FERA*
1-2**	Up to \$31,020	Not eligible
3	Up to \$39,060	\$29,061-\$48,875
4	Up to \$47,100	\$47,101-\$68,875
5	Up to \$55,140	\$65,141-\$88,975
6	Up to \$63,180	\$83,181-\$99,075
7	Up to \$71,220	\$71,221-\$99,075
8	Up to \$79,260	\$79,261-\$99,075
Each additional person, add	\$8,040	\$8,040-\$10,050

\*Before taxes based on current income sources  
\*\*New as of January 1, 2014, and valid through May 31, 2014.

If you do not qualify for CARE, you may still be eligible for the Family Electric Rate Assistance (FERA) Program, which offers a discount on monthly bills for families of three or more. Apply at [pge.com/FERA](http://pge.com/FERA).

##### Medical Baseline

If you depend on life-support or other equipment due to medical needs, you may be eligible for additional energy at the lowest price through the Medical Baseline Program. Apply at [pge.com/MedicalBaseline](http://pge.com/MedicalBaseline).

2

#### One-Time Home Improvements

##### Energy Savings Assistance (ESA) Program

If you are eligible for the CARE Program and your home is five or more years old, then you may also qualify for the ESA Program.

You could be eligible to receive free energy-efficient home improvements, such as:

- Appliances to replace your old refrigerator, furnace and water heater†
- Weatherization services to keep your home cooler in the summer and warmer in the winter
- Installation of compact fluorescent lights that use up to 70 percent less energy than incandescent lights

##### PG&E and our authorized contractors will:

1. Assess your home's energy efficiency
2. Install customized home improvements
3. Repair or replace appliances, if needed, after conducting a natural gas safety test
4. Perform a post-installation inspection, if needed

Apply at [pge.com/ESA](http://pge.com/ESA).

3

#### Ongoing Savings

##### Manage your heating and cooling costs

In the **winter**, set your heater to 68 degrees Fahrenheit or lower during the day and 55 degrees Fahrenheit at night. In the **summer**, set your air conditioner to 78 degrees Fahrenheit or higher and visit a community cooling center when temperatures are unusually high. Visit [pge.com/CoolingCenter](http://pge.com/CoolingCenter).

##### Stop paying to power unused electronics

Turn off and unplug computers, TVs, phone chargers, entertainment consoles, coffee makers and other devices. The average U.S. household spends \$100 per year powering electronics that have been turned off or are in standby mode.

##### Wash full loads of laundry using cold water

Today's detergents work well in cold water, saving about 90 percent of the energy your washing machine would use to heat water.

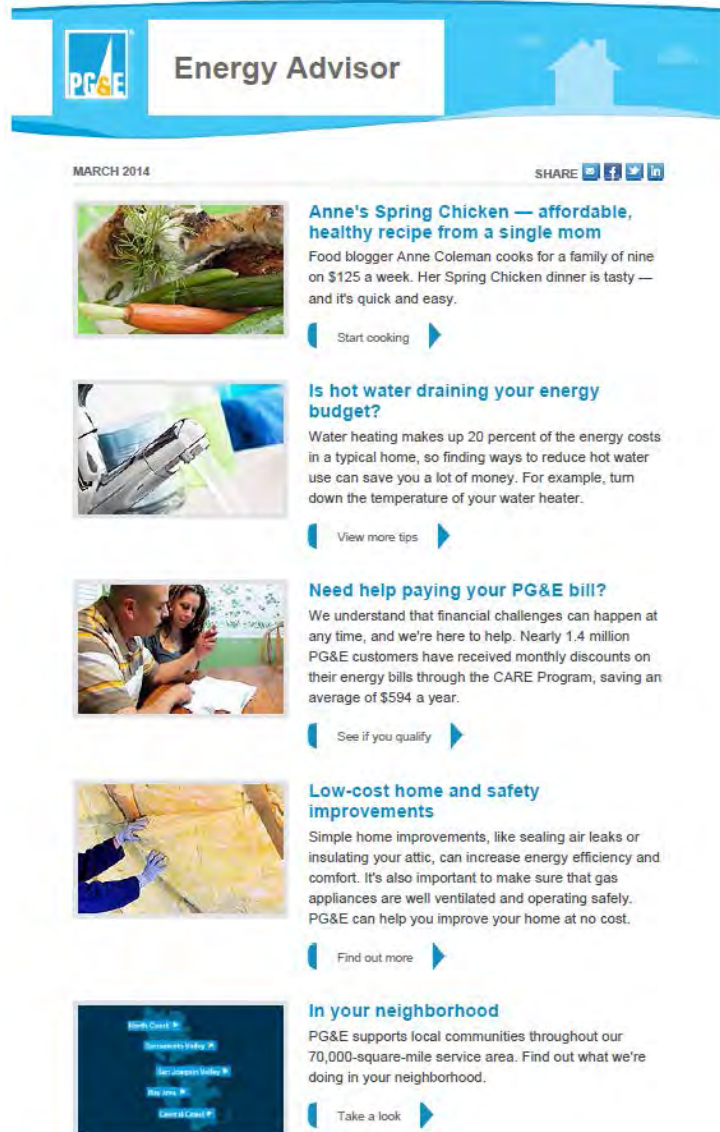
##### Use your refrigerator efficiently

Set your refrigerator from 38 to 40 degrees Fahrenheit and your freezer from 0 to 5 degrees Fahrenheit. Make sure the coils are clean and have room for air circulation.

## Digital Newsletter and Home Energy Report

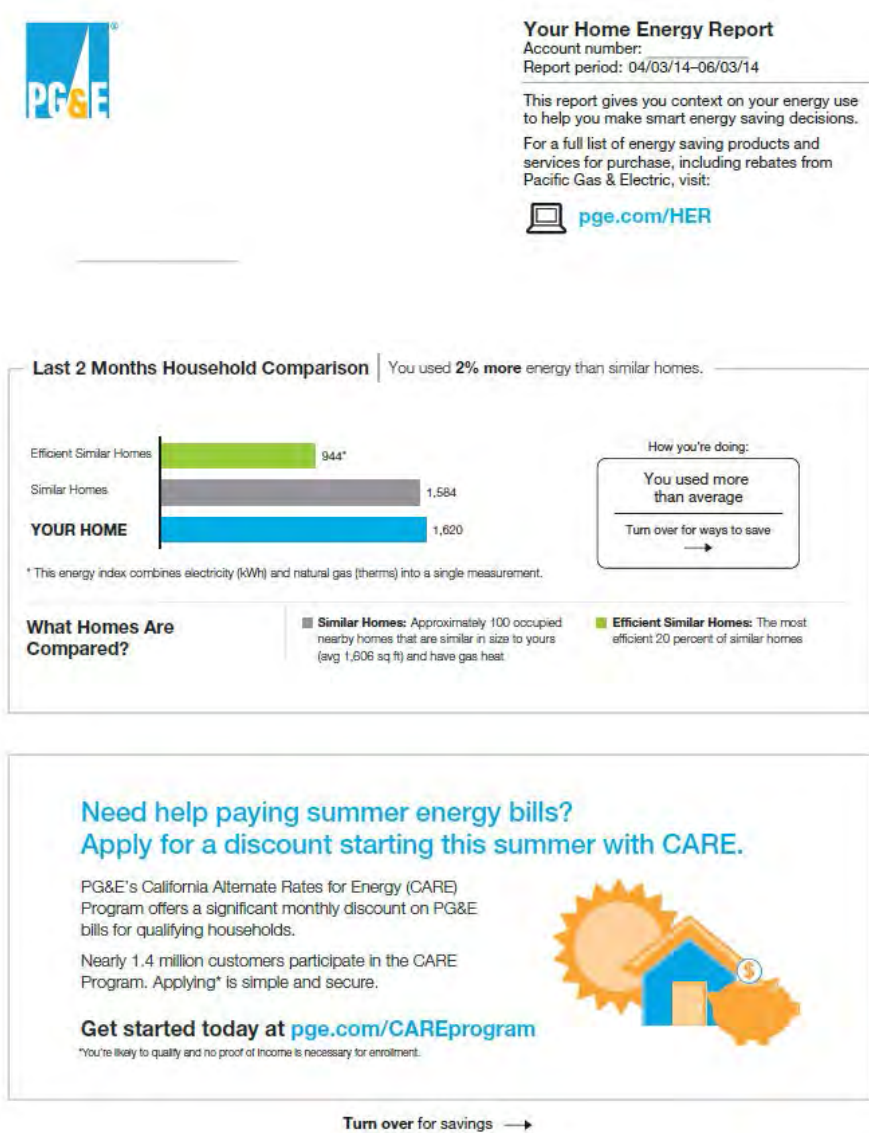
In March, PG&E kicked-off a monthly digital newsletter targeting customers with a high propensity for eligibility in the CARE Program and ESA Program with the purpose of building awareness for both programs. The CARE Program was featured in the March, May, July and October's digital newsletter, resulting in an overall average 25% open and 12% click-thru rate. In the other months, the digital newsletter provided energy savings tools and tips to help customers better manage their energy usage and bill.

Sample digital newsletter creative:



Additionally, CARE launched the CARE Program module for PG&E's Home Energy Report. This version was sent throughout May, June and July to those customers deemed most eligible for CARE according to the probability model and to those customers currently receiving the Home Energy Report.

## Sample Home Energy Report creative:



## Website

In June, PG&E outreach team optimized the design and messaging of the CARE main webpage. PG&E conducted an A/B test, which is a way to test messaging and layout to a randomly selected group so that we can understand what's most effective when communicating with customers. Results show a 57% increase in visits to the enrollment page by adding a banner at the top of the webpage with link to the enrollment page.



Sample webpage creative:

**CURRENT PAGE:**

PG&E MY HOME MY BUSINESS BUSINESS TO BUSINESS

EMERGENCY | Safety | About | Search | GO | ENGLISH

My Bill & Account | Service Requests | Outages | Find Ways to Save | Additional Services | My Account

My Rate Plan  
Usage Analysis & Alerts  
Home Money Saver  
Solar and Renewables  
Savings & Rebate Programs  
Assistance Programs  
CARE Program  
Program Guidelines  
Post Enrollment/Recertification Verification  
Education & Outreach  
FERA Program  
Energy Savings Assistance Program  
Medical Baseline Allowance  
REACH Program  
Third Party Notification  
Strategic Alliance Project  
Plug In Electric Vehicles  
Energy Savings Tips  
Other Resources

## Apply for the CARE Program to Receive Your Monthly Discount

See how the Vega Family saved on their energy bill by enrolling in the CARE Program.

**More Ways to Save**

- Energy Savings Assistance Program**  
Get free home improvements to help keep your home more energy efficient, safe and comfortable.  
[Apply Today »](#)
- Balanced Payment Plan**  
Average out monthly payments allowing you to minimize big swings and budget more effectively.  
[Learn More »](#)
- SmartRate™**  
Receive discounts for conserving energy when demand is highest.  
[Start Saving »](#)
- My Energy**  
Analyze your household's energy usage, compare rate plan options and get even more.

**We're Here to Help You Save**

Nearly 1.4 million customers participate in the California Alternate Rates for Energy (CARE) Program, which offers a significant monthly discount on energy bills for qualifying households, based on the total income of everyone living in the home.

**Applying Is Simple and Secure**

Apply today by answering a few simple questions. No proof of income is necessary for enrollment and your answers will remain confidential.

**Enroll in English, Español, 中文 or Việt (PDF).**

**TEST PAGE:**

PG&E MY HOME MY BUSINESS BUSINESS TO BUSINESS

EMERGENCY | Safety | About | Search | GO | ENGLISH

My Bill & Account | Service Requests | Outages | Find Ways to Save | Additional Services | My Account

My Rate Plan  
Usage Analysis & Alerts  
Home Money Saver  
Solar and Renewables  
Savings & Rebate Programs  
Assistance Programs  
CARE Program  
Program Guidelines  
Post Enrollment/Recertification Verification  
Education & Outreach  
FERA Program  
Energy Savings Assistance Program  
Medical Baseline Allowance  
REACH Program  
Third Party Notification  
Strategic Alliance Project  
Plug In Electric Vehicles  
Energy Savings Tips  
Other Resources

## Apply for the CARE Program to Receive Your Monthly Discount

[Enroll Now](#)

**We're Here to Help You Save**

Nearly 1.4 million customers participate in the California Alternate Rates for Energy (CARE) Program, which offers a significant monthly discount on energy bills for qualifying households, based on the total income of everyone living in the home.

**Applying Is Simple and Secure**

Apply today by answering a few simple questions. No proof of income is necessary for enrollment and your answers will remain confidential.

**Enroll in English, Español, 中文 or Việt (PDF).**

Check the chart to see if you qualify

Number of Persons in Household	Total Gross Annual Household Income*
1-2	\$31,460 or less
3-4	\$39,580 or less


**More Ways to Save**

- Energy Savings Assistance Program**  
Get free home improvements to help keep your home more energy efficient, safe and comfortable.  
[Apply Today »](#)
- Balanced Payment Plan**  
Average out monthly payments allowing you to minimize big swings and budget more effectively.  
[Learn More »](#)
- SmartRate™**

As a follow up to the first A/B test, PG&E conducted a second A/B test in September to further understand what's more effective when communicating with customers. The second A/B test resulted in 10% more click-thru to the online application. The webpage page was redesign in a 1-2-3 format and removing other programs on the right hand side so that customers can focus on the CARE Program.

Sample webpage creative:

## Apply for the CARE Program to Receive Your Monthly Discount

[Enroll Now](#)


### We're Here to Help You Save

Nearly 1.4 million customers participate in the California Alternate Rates for Energy (CARE) Program, which offers a significant monthly discount on energy bills for qualifying households, based on the total income of everyone living in the home.

### Applying Is Simple and Secure


Apply today by answering a few simple questions. No proof of income is necessary for enrollment and your answers will remain confidential.

Enroll in [English](#), [Español](#), [中文](#) or [Việt \(PDF\)](#).


Check the chart to see if you qualify.

Number of Persons in Household	Total Gross Annual Household Income*
1-2	\$31,460 or less
3	\$39,580 or less
4	\$47,700 or less
5	\$55,820 or less
6	\$63,940 or less
7	\$72,060 or less
8	\$80,180 or less
Each additional person added	\$8,120


### More Ways to Save




**Energy Savings Assistance Program**  
Get free home improvements to help keep your home more energy efficient, safe and comfortable.  
[Apply Today »](#)



**Balanced Payment Plan**  
Average out monthly payments allowing you to minimize big swings and budget more effectively.  
[Learn More »](#)



**SmartRate™**  
Receive discounts for conserving energy when demand is highest.  
[Start Saving »](#)




**My Energy**  
Analyze your household's energy usage, compare rate

## Save 30%\* or More on Your PG&E Bill

[Apply Now](#)

\*Gas and electricity customers can save at least 30 percent while gas-only customers can save at least 20 percent.



### The CARE Program Offers You Significant Discounts on Gas and Electricity

We know that it can be difficult to cover all your expenses each month. That's why we offer CARE, the California Alternate Rates for Energy Program. It gives qualified households deep discounts on their energy bills. We care and want to help.

### It's Fast and Easy to Sign Up

1

Find out if you're eligible.

#### Residential Single-Family Customers

Number of Persons in Household	Total Gross Annual Household Income**
1-2	\$31,460 or less
3	\$39,580 or less
4	\$47,700 or less
5	\$55,820 or less
6	\$63,940 or less
7	\$72,060 or less
8	\$80,180 or less
Each additional person, ...	\$8,120


### CARE Resources

#### Need Help?

If you have questions or need assistance filling out the application, please email us at [careprogram@pge.com](mailto:careprogram@pge.com) or call 1-866-743-2273.

#### We CARE

Looking for more information about the California Alternate Rates for Energy (CARE) Program? [Get the FAQs »](#)



#### Find Out How CARE Has Helped the Vega Family

[Watch Video »](#)

## Retention

In April, PG&E implemented ongoing monthly automatic recertification efforts to customers who are approaching their two-year program expiration and have been identified as most likely eligible according to the CARE Probability Model. Analysis of customers randomly selected for PEV shows that, on average, less than five percent of customers in Deciles 1-2 of the model are proven to be ineligible. Customers in this group are 64 percent less likely to be ineligible than customers in the remaining deciles. PG&E designed a direct mail and email to notify these customers of their automatic recertification and provide the opportunity to opt out if they no longer qualified. The auto-recertification initiative helps reduce and reinvest outreach and operational costs since these customers no longer need to receive separate recertification notices and go through the process of recertification. Combined with our outreach efforts, April was the first time in two years in which the CARE Program experienced a growth in penetration.

Sample auto-recertification creative:




Additionally to support the retention initiatives, PG&E designed a letter to be sent to customers 30 days before they approach their two-year program expiration. The 30-day letter, which is sent in both English and Spanish, is to help remind customers to reapply for the CARE Program.



Sample 30-day creative:

Renew your discount within 30 days,  
before your bill goes up.



John Q. Sample  
Address 1  
Address 2  
City, State, ZIP

Reapply for the CARE Program.  
Go to [pge.com/renewcare](http://pge.com/renewcare).

June XX, 2014

Dear [Name],

As a member of the **California Alternate Rates for Energy (CARE) Program**, you're currently receiving a significant monthly discount on your energy bills.

**To continue saving on the program, you must renew every two years,\*** and it's time for you to renew. Remember: If we don't receive your renewal form before **your monthly discount expires on [date]**, you'll notice an increase on your bill.

**Three easy ways to renew:**  
You're likely to still qualify. Confirm by reviewing the household income table in the enclosed application. Renew today by answering a few simple questions using one of these three methods:


- **Online:** Go to [pge.com/renewcare](http://pge.com/renewcare) to fill out and submit the form.
- **Phone:** Call us at 1-866-743-2273 and we'll walk you through it.
- **Mail:** Fill out the included application and return it to PG&E.

**Your account number is: 0123456789.** You'll need this for the application.


While no proof of income is required for renewal, you may be asked to provide proof of household income at any time.

Have questions or need help filling out the application? Just email us at [careprogram@pge.com](mailto:careprogram@pge.com).

Sincerely,



Allen Fernandez Smith  
Customer Energy Solutions  
Pacific Gas and Electric Company



P.S. You can also help family members, friends and neighbors who may qualify by telling them about the benefits of the CARE Program.

\*If you're on a fixed income, you must reapply every four years.  
PG&E refers to Pacific Gas and Electric Company, a subsidiary of PG&E Corporation. ©2014 Pacific Gas and Electric Company. All rights reserved. These offerings are funded by California utility customers and administered by PG&E under the auspices of the California Public Utilities Commission. PG&E prints its materials with soy based inks on recycled paper. June 2014 CCA-0514-2751

Throughout this campaign, PG&E tested different channels, messaging and creative versions, identifying optimization opportunities and implementing learnings in real time for improved results. Enhanced tracking and measuring mechanisms applied to all channels helped to improve forecasting accuracy and informing the 2014 outreach plan.

The Community Engagement work complemented the Solutions Marketing Outreach by adding face-to-face interactions and enrollment activities through trusted partners and events. These activities occurred throughout the whole year. The activities included.

- **Community Outreach Contractors (COCs)** - PG&E contracted with 69 COCs throughout its service area. These represent a variety of communities, including African-Americans, Hispanics, Asian Pacific Islander Americans (Chinese, Vietnamese, Laotian, and Hmong), Native Americans, seniors, rural residents, agricultural workers, sub-metered tenants, and nonprofit living facilities. This initiative led to 752 new enrollments.
- **Local Office Partnerships** - CARE partnered with 75 PG&E local offices to inform customers about the program, distribute applications, and enroll qualified customers onto CARE. This initiative produced 10,524 new enrollments.

- **Community Events** - The Community Engagement staff attended several events to create awareness and provide education on CARE and other assistance program. These events included collaborative efforts with internal partners to educate customers about residential rate changes and energy efficiency education at PG&E Local Offices/community events and at multi-family community events. For example, CE team coordinated efforts with internal partners to setup the PG&E CARE community outreach event in Bakersfield on August 12, 2014 to provide customers information on residential rate reform, smart meter, energy efficiency tips, and answer specific billing questions. PG&E also participated in 2014 San Francisco Housing Expo on June 2014 to provide information about CARE and energy efficiency information to customers and housing advocates that cater to low income households.

**Describe how the current program delivery strategy differs from previous years, specifically relating to Identification, Outreach, Enrollment, Assessment, Energy Audit/Measure Installation, and Inspections.**

In 2014, PG&E identified customers who may be most eligible for the ESA Program by reaching out to current CARE participants since we know that these customers are income-qualified. From there, we removed those customers who live in homes that are less than five years old as well as those customers who live in ESA treated homes. This strategy has been different from previous years.

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

Similar to 2013, online enrollment was the most effective method throughout 2014. With 155,777 new enrollments, this method brought in the highest volume, while providing applicants with an efficient and positive customer experience. With the application available in English, Spanish and Chinese on PG&E's website, customers enrolled using one of two options: completion of a simple form which requires no registration or via "My Energy," which requires user registration. Customers were able to enter the necessary household and income eligibility information, accept the declaration and submit the application electronically. This allowed customers to complete the process at their convenience and from their location of choice. All applications submitted electronically were received and processed quickly. Most 2014 outreach initiatives, including direct mail, email, and digital and print media, drove customers to the CARE website.

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

PG&E spent 2014 leveraging the research conducted during the second half of 2013 and incorporating those key insights into our marketing outreach campaigns. With the ultimate goal of increasing participation of households with a high propensity for eligibility, PG&E dedicated time to gain a deeper understanding of the low-income customer segment and their end-to-end experience with PG&E offerings, through qualitative and quantitative research. Key insights show that customers are generally:

- Overwhelmed by financial troubles and left with little time and energy to apply for help
- Unaware of full program benefits, including the magnitude of the CARE discount, leading them to believe that it may not be worth their effort
- Unclear about program eligibility and recertification criteria
- Suspicious of PG&E's motives for discounting their bill
- Fearful that PG&E will share their information with government agencies, particularly with the Immigration and Naturalization Service
- Discouraged by the formal tone and confused by onerous outreach materials and forms

The insights gathered helped PG&E enhance outreach efforts, develop mitigation tactics to enrollment barriers and better serve low income customers through:

- A multi-channel, multi-touch outreach approach that included automated calls, direct mail and email, as well as digital advertising
- Simplified messaging and design; use of iconography and step-by-step, color-aided instructions
- More enticing headers and subject lines, as well as outer envelope messaging
- Clarified qualification criteria, documentation needed and timing; increased urgency to comply
- A more empathetic and friendlier tone
- Mention of simplicity and ease of application, savings potential and confidentiality of the information shared
- Mention of how quickly and where they will see savings on their bill
- Added function to share details with potentially eligible friends and family
- Optimized tracking and measuring mechanisms

Though language did not pose a significant barrier to enrollment in 2014, PG&E recognizes the diversity of customers in its service area and continues to offer CARE materials and services in multiple languages, including English, Spanish, Chinese, Korean, Tagalog, Hmong, Russian and Vietnamese.

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

A small geographic location of PG&E's service area is shared with other investor owned or municipal utilities. Due to more stringent information security requirements, PG&E is in the process of updating automatic enrollment agreements with SCG, SCE, and Sacramento Municipal Utility District to exchange listings of enrolled CARE customers that are identified in the shared service areas.

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

A database of CARE customer contact information is uploaded for weekly distribution to PG&E's ESA Program providers to use for their outreach. Since November 1, 2005, when the ESA and CARE income guidelines were aligned at 200 percent of the FPG, CARE automatically enrolls customers who have participated in the ESA Program.

Since the CARE discount is noted in the customer information system, Customer Service Representatives (CSR) are able to see the CARE status of any customer calling PG&E's contact centers for assistance. This provides important information for CSRs to use when discussing other benefits and services that may be of assistance to the income-qualified customer.

CARE features other financial assistance information on its applications. Each 8.5" x 11" application provides a brief description of other assistance programs available as well as contact numbers.

PG&E's CARE program integrated with other PG&E assistance programs to generate enrollments. CARE applications are on display and available to visitors at Cooling Centers. PG&E provides the CHANGES program with training and collateral to help limited English-proficient customers enroll in CARE and other assistance programs. PG&E conducted monthly data exchanges with the ESA Program to automatically enroll eligible customers in CARE. PG&E also ran monthly reports of customers receiving bill payments through the LIHEAP and Relief for Energy Assistance through Community Help (REACH)

programs and automatically enrolled eligible customers in CARE. These efforts resulted in 31,515 new enrollments.

**2.4.6.** Describe the efforts taken to reach and coordinate the CARE program with other related low income programs to reach eligible customers.

Throughout 2014, PG&E targeted existing CARE customers for any outreach related to the ESA Program. This was a way to ensure that the customer qualified via income guidelines. Other filters were then applied to determine those customers who would be most eligible for the ESA Program.

Additionally, PG&E leveraged our Integrated Programs Brochure that integrates key low income programs, services and savings tips in a step-by-step, easy-to-understand and succinct manner, which is available in seven languages.

PG&E automatically enrolls customers who receive LIHEAP and REACH assistance onto the CARE Program. Furthermore, for the CARE Automated Phone Calls, PG&E integrates information about the FERA and ESA Programs. In 2014, 26,566 ESA Program participants were enrolled in the CARE Program.

Additionally, PG&E continues to coordinate CARE, ESA and other low income outreach efforts to provide likely eligible customers with the knowledge and tools to access PG&E's services. Recent examples include an updated brochure that integrates key low income programs, services and savings tips in a step-by-step, easy-to-understand and succinct manner, available in seven languages starting January 2014. The goal with these and similar efforts moving forward is to help financially challenged customers manage their energy bills in a more holistic and sustainable way.

**2.4.7.** Describe the process for cross-referral of low income customers between the utility and the California Department of Community Services and Development (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.)

PG&E has provided assistance by leveraging federal funding through the Low Income Home Energy Assistance Program 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 to that portion of the population during that period.

**2.4.8.** Discuss any recommendations to improve cost-effectiveness, processing of applications, or program delivery. Discuss methods investigated or implemented by the utility or third parties under contract to the utility to improve outreach and enrollment services to non-participating households in the prior year. Provide cost-effectiveness assessments, if available.

To improve the cost-effectiveness of outreach and enrollment services, PG&E focused on:

- Optimizing our targeting strategies with the goal of enrolling truly eligible customers
- Using more cost-effective outreach channels, such as automated phone calls and email

- Driving customers to the online enrollment form for quicker processing and lower operational costs
- Testing different messaging and creative versions in market (as opposed to commissioning additional research), identifying quick enhancement opportunities and implementing learnings in real time for optimized results
- Automatically recertifying customers who are most likely qualified and fall within deciles 1-2 of the CARE Probability Model
- Developing more communications 30 days prior to customers falling off the program to improve customer experience and reduce operational and outreach costs

In 2014, PG&E was able to establish new baselines, which will help inform long-term outreach strategy and identify the most cost-effective marketing tactics moving forward.

## **2.5. Processing CARE Applications**

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

D.08-11-031, OP 100 authorized PG&E to change the certification period for sub-metered tenants from one year to two years. PG&E mails the recertification package to sub-metered tenants 90 days prior to their CARE expiration date. A reminder letter is also mailed 30 days prior to their CARE expiration date. The tenants are removed from the CARE rate if they do not respond.

- 2.5.2.** Describe any contracts the utility has with third parties to conduct certification, recertification and/or verification on the utility's behalf. Describe how these third-party efforts compare to the utility's efforts in comparable customer segments, such as hard-to-reach or under-served. Include comparisons of effectiveness and cost-effectiveness of comparable customer segments, if available.

PG&E contracted with two main third-party vendors – Momentum and SoundBite Communication - to conduct automated calls, direct mail, email, and digital advertising to conduct certification and recertification to eligible customers. Their functions and effectiveness are described in detail in Section 2.4.

PG&E also contracted with a third-party vendor Kern USA to: 1) Pick up the CARE mail at PG&E facility. 2) Open, sort, redact sensitive customer info and scan all applications and documents into the EDGeline workflow system (occurs at Kern facility). Applications and Documents uploaded in EDGeline workload system are then assigned to the CARE processors to be completed.

## **2.6. Program Management**

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

The enactment of Assembly Bill (AB) 327 in the fall of 2013 changed the program income eligibility for one-person households to again be included in the two-person household income level effective January 1, 2014. As the result, the number of estimated eligible customers was increased by approximately four percent.

AB 327 also established that the CARE electric discount be no less than 30 percent and no greater than 35 percent of revenue. The rate increase began in August 2014 and will continue in phases through 2018.

PG&E implemented Phase III of the CARE One System upgrade in December 2014 that allow collection of customer information provided on the application such as household size, participated categorical program or household income, communication references, etc. Though this new upgrade provided PG&E with the ability to collect additional customer information for tracking, reporting and analysis purposes, it also resulted in longer processing time for each application.

PG&E implemented the new CARE Enrollment via Mobile Devices in December 2014. This new mobile platform will enable customers to enroll in CARE using mobile channels such as smart phones and tablets.

PG&E filed the ESA and CARE Programs and Budget Application for 2015-2017 program years on November 18, 2014. Since the staffs overseeing the day-to-day program administration were also the same staffs working on the Application filing, it has been an added challenge to effectively manage the program and submit robust program proposals for the coming years.

### **High Usage PEV Process**

PG&E continued the High Usage PEV process in 2014. CARE customers with usage above 400% of baseline in the previously monthly billing cycle were selected for the process.

#### **Stage 1 – Income Verification and ESA Agreement**

- Provide an IRS Tax Return Transcript or Verification of Non-Filing
- Agree to participate in the Energy Savings Assistance Program

#### **Stage 2 – ESA Participation**

- Complete participation in the Energy Savings Assistance Program – allow contractor and inspector access to all portions of metered property
- Notice to reduce and/or maintain usage below 600% of baseline within 90 days

#### **Stage 3 – Usage Monitoring / Appeal Process**

- Maintain usage below 600% of baseline, or be removed from CARE
- Customers removed from CARE are blocked from re-enrolling for two years
  - Removed customers can file an expedited appeal to prove usage is “necessary, basic, and legitimate”

PG&E’s High Usage PEV results are reported in CARE Table 13.

### **Standard PEV Process**

PG&E implemented its Long Term Model for PEV selection in March 2014 (OP 89). PG&E’s 2014 annual PEV rate was seven percent (3 percent high usage + 3 percent model + 1 percent random selection), and applied to all enrolled CARE customers (OP 91).

The table below shows a breakdown of the 2014 Standard PEV results by enrollment type (OP 94d-e).

<b>2014 PEV Results by Enrollment Type</b>		
<b>Status<sup>1</sup></b>	<b>Income</b>	<b>Categorical</b>
Approved	49.3%	45.1%
Over Income	5.5%	3.2%
Request Drop	3.9%	1.7%
No Response	41.3%	50.0%
<sup>1</sup> Status as of March 31, 2015.		

PG&E's overall 2014 PEV results are reported in CARE Tables 3A (Model) and 3B (High Usage) (OP 94a-c). Significant PEV improvements have been gained with the implementation of the CARE Probability Model and high usage requirements. Customers selected for PEV by the model (scores in deciles 9 and 10) are 64 percent more likely than those randomly selected to be verified as ineligible (deemed over income or requested removal from the program) (OP 94f).

Interim model analysis was conducted in 2013, and lessons learned from the analysis were incorporated into the Long Term Model design. The Long Term Model framework, including optimal PEV rate, was proposed in AL 3410-G/4279-E filed on September 3, 2013 (OP 95), and approved by Energy Division effective October 3, 2013. The Long Term Model was implemented in Q1 2014. The Long Term Model is designed to overlook potential non-responders who look eligible through their PG&E transactions, but are also likely to not respond to the PEV request. This is achieved by an algorithm that looks at the degree to which third-party data overlays are missing, indicating a customer has short tenure and may be more transient and less established. The end result is that the model targets customers for PEV who are likely ineligible and would be denied, regardless of likelihood to respond. The initial Standard PEV non-response rate decreased from 62 percent to 52 percent as a result of this enhancement.

The CARE subsidy decreased by 14 percent to \$607 million in 2014, compared to increases over the past five years from \$450 million in 2008. The high usage requirements and Long Term Model will continue to be instrumental in identifying customers who are likely not qualified, thus reducing the subsidy, while maintaining ease of enrollment for the vast majority of customers who are truly in need of the discount.

## **2.7. Pilots**

### **2.7.1. CHANGES**

The Community Help and Awareness with Natural Gas and Electricity Services (CHANGES) Pilot Program provides funding to Community Based Organizations (CBOs) to assist Limited English Proficient (LEP) customers with energy education and billing issues.

In 2014, the IOUs continued to work with CHANGES implementers to maintain reporting procedures to evaluate individual cases and group workshops/presentations conducted by CBOs in compliance with D.12-12-011 and D.12-08-044. CHANGES data pertaining to program expenditures, one-on-one and group customer assistance sessions continues to be collected from the CBOs and reported in the monthly CARE/ESA report in CARE Tables 9, 10 and 11.

CHANGES CBOs continue to assist LEP customers on a variety of issues, including: helping customers enroll in the CARE and ESA Programs, providing energy efficiency education and bill education, setting up a PG&E account/payment plan, obtaining LI HEAP assistance, and help with avoiding service disconnection. While PG&E Customer Service Representatives provide in-language support through its

Contact Centers' 3<sup>rd</sup> party affiliates, the CHANGES Program provides LEP customers with another alternative to getting help with their PG&E billing issues through local, trusted CBOs.

CSID and PG&E worked together to improve the coordination between CHANGES CBOs and PG&E customer service. To comply with consumer privacy rules and support CHANGES CBOs and their clients, PG&E updated its Customer Operations policies to allow verbal authorization from a customer to discuss their account information with a CHANGES CBO representative. This verbal authorization is only allowed if the customer is asking us to speak with a CBO representative on their behalf and is only good for that phone call. In coordination with CSID, PG&E also modified its customer authorization form (79-1095) to enable a CHANGES CBO representative to speak directly to PG&E customer service to review a customer's energy bills and set payment arrangement on a customer's behalf. PG&E staff continued to work in concert with CHANGES implementers to address escalated customer issues. PG&E plans to implement process efficiencies to quicken turnaround times on resolutions and ensure better coordination among stakeholders in 2015.

The CHANGES pilot program will continue to provide outreach, education, needs, and dispute resolution to LEP customers and it will report on the customer assistance provided in the monthly ESA/CARE reports. In accordance with D.14.08-030, CHANGES Pilot would be extended with a 2% adjustments for cost-of-living allowance, effective January 1<sup>st</sup> 2015.

### **3. CARE Expansion Program**

#### **3.1. Participant Information**

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

See CARE-Table 12 – CARE Expansion Program.

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

There were approximately 68,300 tenants residing within facilities receiving the CARE discount by December 31, 2014. 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.

#### **3.2. Usage Information**

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

See CARE-Table 12 – CARE Expansion Program.

#### **3.3. Program Costs**

- 3.3.1.** Administrative Cost (Show the CARE Expansion Program's administrative cost by category)

The CARE Expansion program's administrative cost was reported as part of the overall program administrative expenses. See CARE-Table 1 – Overall Program Expenses.



**3.3.1.1. Discount Information**

Following is the total annual discount, by energy source, for the CARE Expansion Program:

Gas:	\$1,029,958
Electric:	\$6,718,043
Total:	\$7,748,001

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

Electric:	\$525.48
Gas:	\$109.68

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

Electric:	\$4,012.79
Gas:	\$991.56

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

Agricultural employee housing facilities continue to be a difficult demographic for the CARE program to reach. To be certified for CARE, these facilities must be permitted by the California Department of Housing and Community Development (HCD) in addition to meeting CARE income guidelines. PG&E continued to utilize a list of currently permitted facilities from the HCD and mailed a CARE outreach packet to the operators. As a result, one new facility was enrolled on CARE.

PG&E continues to utilize a nonprofit mailing list from the United Way Bay Area to outreach to group living facilities/shelters within its network. PG&E also utilizes its database of facilities previously dropped from CARE due to lack of recertification. As a result, nine new facilities were enrolled in CARE. CARE continues to use the PG&E website as a useful source of information. As new program information and income guidelines became available, applications were updated online in formats that allowed for easy download and printing. PG&E did not work with third parties on the utility's behalf.

**3.4.2. Discuss each of the following:****3.4.2.1. Discuss the most effective outreach method, including a discussion of how success is measured.**

The downloading and printing of the nonprofit group living facility application have become the most effective outreach method because nonprofit organizations seeking financial assistance could easily obtain program information online. In addition, PG&E is available via telephone or e-mail to address any questions pertaining to their eligibility and account information.

- 3.4.2.2.** Discuss how the CARE facility data and relevant program information is shared by the utility with other utilities sharing service territory.

PG&E does not currently exchange CARE facility data or expansion program information with other utilities in the shared service areas.

- 3.4.2.3.** Discuss barriers to participation encountered in the prior year and steps taken to mitigate these, if feasible, or not, if infeasible.

The certification period for nonprofit group living facilities is two years. At the end of the 2-year period, PG&E mails a recertification packet to the listed primary contact. Due to an organization's frequent personnel changes, the current staff is not always aware of the CARE Program or the recertification process. As a result, approximately half of the organizations did not recertify though they still qualified for the discount. To address this barrier, PG&E proactively called customers to remind them to recertify, answer any questions they might have and guide them through the enrollment process.

For the agricultural employee housing facilities, the barriers were the lack of understanding of the CARE Program criteria and the perception of inconvenient paperwork. Some of the barriers included facility owners and managers were unsure about the type of permit requirements, some believed their facility would not qualify because the company was a business, or the tenants did not pay for utilities and/or tenants did not live in the housing facility year-round. PG&E overcame these barriers by working one-on-one with the facility owners and managers to ensure they were successfully enrolled.

Some organization managers were confused by the change of eligibility criteria: the total gross income for all residents or clients occupying the facility at any given time must meet the current CARE income eligibility guidelines. Previously, each household income occupying the facility at any given time had to meet the current CARE income eligibility guidelines.

Although PG&E revised its applications in 2014 to provide more clarification about the program requirements, PG&E continued to receive phone calls asking for clarification about the definition of a Satellite Facility as well as the requirement that non-profit facilities such as homeless shelters, hospices, and women's shelters must be open for operation with at least six beds. PG&E plans to revise its Non-Profit application again in 2015 to provide more clarification based on customers on-going feedbacks.

- 3.4.3.** Discuss any recommendations to improve the cost-effectiveness, processing of applications, or program delivery. Discuss methods investigated or implemented by the utility or third parties on the utility's behalf to improve outreach and enrollment services to non-participating facilities in the prior year. Provide cost-effectiveness assessments, if available.

PG&E continued to reach out to agricultural facilities and implemented a targeted approach to those facilities not currently enrolled in the CARE Program. The Nonprofit and Agricultural Housing mass mailing initiative was created and mailed by program staff to make the initiative cost-effective. Additionally, the CARE application is available online for interested organizations to apply.

### **3.5. Program Management**

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

PG&E encountered some technical difficulties when the company upgraded from Windows XP to Windows 7. Because the databases for the expansion program were not supported on Windows 7, the

CARE team had to continue processing the expansion program applications using old computers. Although PG&E solved this problem by building a new access database in 2013 that is efficient, user-friendly and compatible with future hardware or software upgrades as a short-term solution. PG&E plans to incorporate the expanding program database into the CARE One system during the next phase of system upgrade and enhancement as the long-term solution.

#### **4. Fund Shifting**

##### **4.1.1. Report ESA Program fund shifting activity that falls within rules laid out in Section 6.2 of D.12-08-044.**

In compliance with D.12-08-044, the “Utilities are permitted to shift funds from one year to another within the 2012-2014 cycle without prior approval.” At year-end 2014, there was an over-spend in the HVAC-electric and gas, and the Domestic Hot Water-gas subcategories. ESA-Table 12 shows the fund-shift from Appliances-electric and gas to HVAC- electric and gas to cover the total over-spend of \$5,088,533-electric and \$1,419,615-gas.

ESA-Table 12 also shows the carry-forward of 2009-2011 gas funds of \$2,849,505 from the Energy Efficiency category to the 2014 HVAC-gas and Domestic Hot Water-gas subcategory authorized budget.

##### **4.1.2. Report CARE fund shifting activity that falls within rules laid out in Section 6.2 of D.12-08-044.**

In compliance with OP 135(c) of D.12-08-044, authorizing CARE fund shifting between categories in the same manner as the 2009-2011 budget cycle, PG&E shifted \$52,434 from the Outreach category to the CHANGES Pilot Program category and the Measurement & Evaluation category, and \$427,097 from the Post Enrollment Verification category to the Information Technology Programming category to cover the overspend. The CARE total administrative expenses in 2014 did not exceed the overall authorized budget.

##### **4.1.3. Was there any ESA Program or CARE fund shifting activity that occurred that falls OUTSIDE the rules laid out in Section 6.2 of D.12-08-044?**

There was no ESA or CARE Program fund shifting activity that occurred in 2014 that fell outside of the fund shifting guidelines in D.12-08-044.

#### **5. Long Term Projects and Obligations**

##### **5.1.1. The utilities shall separately track and report all long-term projects and obligations, including all information regarding funds encumbered and estimated date of project completion until such project is completed (D.12-08-044, OP135(a)).**

PG&E has no ESA or CARE long-term projects that will carry across the current 2012-2014 cycle. The four authorized ESA Studies for the 2012-2014 program cycle have been completed.

**6. Appendix: ESA Program Tables and CARE Tables**

ESA – Table 1 – Overall Program Expenses

ESA – Table 2 – Expenses and Energy Savings by Measures Installed

ESA – Table 3 – Cost Effectiveness

ESA – Table 4 – Detail by Housing Type and Source (4A, 4B and 4C)

ESA – Table 4A – Energy Savings

ESA – Table 4B – Penetration History

ESA – Table 4C – Eligible Household Shared Service Territory

ESA – Table 5 – Direct Purchases & Installation Contractors

ESA – Table 6 – Cost of Program Installation Contractors

ESA – Table 7 – Expenditures Recorded by Cost Element

ESA – Table 8 – Homes Unwilling / Unable to Participate

ESA – Table 9 – Life Cycle Bill Savings by Measure

ESA – Table 10 – Energy Rate Used for Bill Savings Calculations

ESA – Table 11 – Bill Savings Calculations by Program Year

ESA – Table 12 – Fund Shifting

ESA – Table 13 – Categorical Enrollment

ESA – Table 14 – Leveraging & Integration

ESA – Table 15 – Lighting

ESA – Table 16 – “Add Back” Measures

CARE – Table 1 – Overall Program Expenses

CARE – Table 2 – Enrollment, Recertification, Attrition, and Penetration

CARE – Table 3A – Post-Enrollment Verification Results (Model)

CARE – Table 3B – Post-Enrollment Verification Results (High Usage)

CARE – Table 4 – Self-Certification and Self-Recertification Applications

CARE – Table 5 – Enrollment by County

CARE – Table 6 – Recertification Results

CARE – Table 7 – Capitation Contractors

CARE – Table 8 – Participants per Month

CARE – Table 9 – Average Monthly Usage & Bill

CARE – Table 10 – Surcharge & Revenue

CARE – Table 11 – Capitation Applications

CARE – Table 12 – Expansion Program

CARE – Table 13 – High Usage Verification Results

CARE – Table 14 – Categorical Enrollment

# Pacific Gas and Electric Company

## PY 2014 Energy Savings Assistance Program Annual Report

### ESA Table 1

#### Overall Program Expenses

	2014 Authorized Budget <sup>1</sup>			2014 Annual Expenses			% of Budget Spent		
ESA Program:	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
<b>Energy Efficiency</b>									
Appliances [5]	\$ 29,818,572	\$ 1,207,801	\$ 31,026,373	\$ 19,120,852	\$ 711,144	\$ 19,831,996	64%	59%	64%
Domestic Hot Water [4][5]	\$ 924,532	\$ 11,703,860	\$ 12,628,392	\$ 840,776	\$ 11,703,860	\$ 12,544,636	91%	100%	99%
Enclosure [5]	\$ 7,457,463	\$ 41,793,263	\$ 49,250,726	\$ 7,052,592	\$ 39,964,690	\$ 47,017,283	95%	96%	95%
HVAC [5]	\$ 7,773,834	\$ 4,984,715	\$ 12,758,549	\$ 7,773,834	\$ 4,984,715	\$ 12,758,549	100%	100%	100%
Maintenance	\$ -	\$ -	\$ -	\$ -		\$ -	0%	0%	0%
Lighting[5]	\$ 28,575,478	\$ -	\$ 28,575,478	\$ 25,456,980	\$ -	\$ 25,456,980	89%	0%	89%
Miscellaneous [2]	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Customer Enrollment[5]	\$ 1,155,071	\$ 621,961	\$ 1,777,032	\$ 920,697	\$ 495,760	\$ 1,416,456	80%	80%	80%
In Home Education[5]	\$ 9,917,891	\$ 5,340,403	\$ 15,258,294	\$ 9,109,298	\$ 4,905,007	\$ 14,014,305	92%	92%	92%
Pilot	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
<b>Energy Efficiency TOTAL</b>	<b>\$ 85,622,841</b>	<b>\$ 65,652,003</b>	<b>\$ 151,274,844</b>	<b>\$ 70,275,030</b>	<b>\$ 62,765,176</b>	<b>\$ 133,040,205</b>	<b>82%</b>	<b>96%</b>	<b>88%</b>
Training Center [3]	\$ 676,925	\$ 372,394	\$ 1,049,319	\$ 458,988	\$ 247,148	\$ 706,136	68%	66%	67%
Inspections [3]	\$ 4,613,647	\$ 2,616,909	\$ 7,230,556	\$ 3,879,505	\$ 2,088,964	\$ 5,968,469	84%	80%	83%
Marketing and Outreach [3]	\$ 1,260,017	\$ 683,134	\$ 1,943,151	\$ 1,162,269	\$ 625,837	\$ 1,788,107	92%	92%	92%
Statewide Marketing Education and Outreach [1]	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Measurement and Evaluation Studies	\$ 133,250	\$ 71,750	\$ 205,000	\$ -	\$ -	\$ -	0%	0%	0%
Regulatory Compliance [3]	\$ 275,649	\$ 154,832	\$ 430,480	\$ 210,652	\$ 113,428	\$ 324,080	76%	73%	75%
General Administration [3]	\$ 2,865,222	\$ 1,615,712	\$ 4,480,934	\$ 2,659,350	\$ 1,431,958	\$ 4,091,307	93%	89%	91%
CPUC Energy Division	\$ 35,750	\$ 19,250	\$ 55,000	\$ 14,394	\$ 7,751	\$ 22,145	40%	40%	40%
<b>TOTAL PROGRAM COSTS</b>	<b>\$ 95,483,300</b>	<b>\$ 71,185,984</b>	<b>\$ 166,669,284</b>	<b>\$ 78,660,188</b>	<b>\$ 67,280,261</b>	<b>\$ 145,940,449</b>	<b>82%</b>	<b>95%</b>	<b>88%</b>
<b>Funded Outside of ESA Program Budget</b>									
Indirect Costs				\$ -	\$ -	\$ -			
NGAT Costs					\$ 2,948,142	\$ 2,948,142			

[1] The 2014 ESA Statewide Marketing, Education and Outreach authorized budget of \$127,000 was transferred from the PPP-Low Income Balancing Account to the Statewide ME&O Balancing Account per D.12-08-044, D.13-04-021 and D.13-12-038.

[2] The 2014 authorized budget in the Miscellaneous category of \$10,854,095 was redistributed to the HVAC category (\$922,598 for AC Fan Delay- Electric) and the Enclosure category (\$1,559,579 for Attic Insulation - Electric and \$8,371,918 for Attic Insulation - Gas).

[3] The authorized budget and expenses have been updated to include employee benefits costs approved in the GRC (D.14-08-032) - Decision Authorizing Pacific Gas and Electric Company's General Rate Case Revenue Requirement for 2014-2016, issue date of August 20, 2014.

[4] The Domestic Hot Water authorized budget includes \$2,849,505 of carry forward unspent gas funds from the 2009-2011 program cycle.

[5] This measure category includes the primary contractor's administrative fee and subcontractor direct costs.

**Note:** Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

# Pacific Gas and Electric Company

PY 2014 Energy Savings Assistance Program Annual Report  
ESA Table 2  
Expenses and Energy Savings by Measures Installed

Measures	Units	PY Completed & Expensed Installations					
		Quantity Installed	kWh <sup>4</sup> (Annual)	kW <sup>4</sup> (Annual)	Therms <sup>4</sup> (Annual)	Expenses <sup>5</sup> (\$)	% of Expenditure
Appliances							
High Efficiency Clothes Washer	Each						
Refrigerators	Each	17,401	12,340,328	2,103	-	\$ 16,325,166	12.98%
Evaporative Coolers (Replacement)	Each	5,423	2,807,642	3,239	-	\$ 3,517,621	2.80%
Microwaves <sup>6</sup>	Each	22,126	2,889,346	-	183,115	\$ 1,933,504	1.54%
Domestic Hot Water-[each IOU to do]							
Water Heater Blanket	Each	28,778	149,240	33	152,843	\$ 1,725,613	1.37%
Low Flow Shower Head	Each	127,429	1,238,965	161	707,049	\$ 5,279,661	4.20%
Water Heater Pipe Insulation	Home	2,465	8,198	1	15,077	\$ 50,530	0.04%
Faucet Aerator	Home	92,299	190,688	41	247,129	\$ 1,704,523	1.35%
Water Heater Repair/Repl	Each	1,357	-	-	-	\$ 1,004,393	0.80%
Thermostatic Shower Valve <sup>7</sup>	Each	101,880	30,293	-	167,353	\$ 2,215,105	1.76%
Enclosure							
Air Sealing / Envelope <sup>1</sup>	Home	86,457	4,552,995	-	415,099	\$ 37,052,246	29.45%
Caulking	Home						
Weatherstripping	Home						
Utility Gaskets	Home						
Attic Access Weatherstripping	Home						
Evaporative Cooler Cover	Home						
AC Vent Cover	Each						
Attic Insulation	Home	4,415	406,218	211	53,149	\$ 7,211,221	5.73%
HVAC							
FAU Standing Pilot Light Conversion	Each						
Furnace Repair/Replacement	Each	2,223	-	-	-	\$ 2,738,378	2.18%
Room A/C Replacement	Each	1,280	100,243	91	-	\$ 1,158,769	0.92%
Central A/C Replacement	Each	29	1,772	2	-	\$ 54,723	0.04%
Central A/C Tune up	Home	10,497	40,730	63	-	\$ 2,617,910	2.08%
Duct Testing and Sealing	Home	3,460	-	-	-	\$ 2,223,997	1.77%
Maintenance							
Furnace Clean and Tune	Home						
Lighting							
Compact Fluorescent Lights (CFLs)	Each	443,582	6,122,190	571	-	\$ 3,590,069	2.85%
Interior Hard wired CFL fixtures	Each	196,538	8,474,761	966	-	\$ 16,343,556	12.99%
Exterior Hard wired CFL fixtures	Each	34,330	1,483,056	172	-	\$ 2,884,195	2.29%
Torchiere	Each	7,079	1,443,337	142	-	\$ 582,505	0.46%
Occupancy Sensor	Each	11,916	475,448	48	-	\$ 723,557	0.58%
LED Night Lights	Each						
Miscellaneous							
Pool Pumps	Each						
Smart Power Strips	Each	4,901	119,094	16	-	\$ 209,815	0.17%
New Measure							
AC Time Delay <sup>8</sup>	Each	1,023	198,899	411	-	\$ 84,368	0.07%
Customer Enrollment							
Outreach & Assessment	Home	123,539				\$ 1,335,355	1.06%
In-Home Education	Home	123,539				\$ 13,232,259	10.52%
Total Savings/Expenditures			43,073,444	8,270	1,940,815	\$ 125,799,039	
Households Weatherized <sup>2</sup>	Home	107,590					

Homes Treated		
- Single Family Homes Treated	Home	84,072
- Multi-family Homes Treated	Home	31,469
- Mobile Homes Treated	Home	7,998
- Total Number of Homes Treated	Home	123,539
# Eligible Households to be Treated for PY <sup>3</sup>	Home	119,940
% OF Homes Treated	%	103.00%
- Total Master-Metered Homes Treated	Home	9,560

<sup>1</sup> Envelope and Air Sealing Measures may include outlet cover plate gaskets, attic access weatherization, weatherstripping - door, caulking and minor home repairs. Minor home repairs predominantly are door jamb repair / replacement, door repair, and window putty.

<sup>2</sup> Weatherization may consist of attic insulation, attic access weatherization, weatherstripping - door, caulking, & minor home repairs

<sup>3</sup> Appendix A --- A.11-05-017 Adopted Number of Homes to be Treated

<sup>4</sup> All savings are calculated based on the following sources:  
ECONorthwest. "Impact Evaluation of the 2009 CA Low Income Energy Efficiency Program, Final Report." June 16, 2011.

<sup>5</sup> Costs exclude support costs that are included in Table 1.

<sup>6</sup> Microwave savings are from ECONorthWest Studies received in December of 2011

<sup>7</sup> Savings value will be the same as the shower head measure mentioned in footnote [4]

<sup>8</sup> Savings value from Work Paper PGE0077 Revision #1 --- California HVAC Upgrade: Efficient Fan Controller(EFC) for Residential

# Pacific Gas and Electric Company

## PY 2014 Energy Savings Assistance Program Annual Report

**ESA Table 3**  
**Cost-Effectiveness**

PY - Recorded						
	Ratio of Benefits Over Costs			Net Benefits; \$ Millions		
Program Year	Utility Cost Test	Total Resource Cost Test	Modified Participant Test	Utility Cost Test	Total Resource Cost Test	Modified Participant Test
2014	0.63	0.39	0.64	(45.570)	(74.202)	(51.832)
2013	0.56	0.39	0.62	(55.806)	(78.533)	(50.014)
2012	0.44	0.34	0.58	(70.230)	(83.229)	(54.475)
2011	0.58	0.46	0.64	(58.896)	(75.618)	(52.146)
2010	0.59	0.47	0.66	(56.165)	(73.190)	(48.719)
2009	0.59	0.45	0.61	(36.590)	(48.748)	(35.826)
2008	0.48	0.37	0.62	(33.801)	(40.880)	(28.635)
2007	0.46	0.36	0.63	(39.902)	(47.085)	(27.536)
2006	0.48	0.48	0.68	(45.470)	(45.470)	(27.922)
2005	N/A	N/A	N/A	N/A	N/A	N/A
2004	N/A	N/A	N/A	N/A	N/A	N/A
2003	N/A	N/A	N/A	N/A	N/A	N/A
2002	N/A	N/A	N/A	N/A	N/A	N/A

Pacific Gas and Electric Company

PY 2014 Energy Savings Assistance Program Annual Report  
ESA Table 4  
Detail by Housing Type and Source

ESA Table 4A						
		2014 Energy Savings				
Customer	Housing Type	# Homes Treated	GWH	MW	MTHERM	2014 Expenses <sup>1</sup>
Gas and Electric Customers						
Owners - Total						
	Single Family	28,131	11.09	2.41	0.60	\$ 32,692,054
	Multi Family	612	0.17	0.02	0.01	\$ 521,761
	Mobile Homes	3,925	1.33	0.28	0.08	\$ 3,602,726
Renters - Total						
	Single Family	29,769	13.03	2.50	0.61	\$ 31,509,774
	Multi Family	21,138	5.77	0.60	0.25	\$ 16,061,280
	Mobile Homes	463	0.17	0.05	0.01	\$ 392,860
Electric Customers (only)						
Owners - Total						
	Single Family	8,047	3.96	1.09	0.00	\$ 5,532,290
	Multi Family	147	0.06	0.01	-	\$ 101,508
	Mobile Homes	1,889	0.79	0.20	0.00	\$ 1,165,500
Renters - Total						
	Single Family	5,950	3.28	0.81	0.00	\$ 4,709,188
	Multi Family	4,530	1.80	0.16	0.00	\$ 3,003,350
	Mobile Homes	909	0.45	0.13	0.00	\$ 660,519
Gas Customers (only)						
Owners - Total						
	Single Family	6,523	0.46	0.01	0.16	\$ 4,843,212
	Multi Family	33	0.00	-	0.00	\$ 13,929
	Mobile Homes	730	0.03	-	0.02	\$ 391,949
Renters - Total						
	Single Family	5,652	0.38	0.01	0.14	\$ 3,619,015
	Multi Family	5,009	0.30	0.00	0.07	\$ 2,380,961
	Mobile Homes	82	0.00	-	0.00	\$ 29,550
Totals:		123,539	43.07	8.27	1.94	\$ 111,231,425

ESA Table 4B				
Penetration History				
Year	Homes Treated <sup>2</sup>	Ineligible & Unwilling <sup>3</sup>	Estimated Eligible in Current Year <sup>4</sup>	Current Year Penetration Rate for Homes Treated
2002	70,683	NA		
2003	47,271	NA		
2004	48,456	NA		
2005	57,700	NA		
2006	66,043	NA		
2007	63,319	NA		
2008	61,034	NA		
2009	81,308	2,946		
2010	133,329	8,272		
2011	128,071	11,535		
2012	115,229	10,549		
2013	123,566	40,364		
2014	123,539	64,940	119,940	103.00%
2015				
2016				
2017				
2018				
2019				
2020				
Total Homes Treated since 2002	1,119,548	138,606		

<sup>1</sup> Excluding indirect program costs.

<sup>2</sup> Homes treated since 2002 are reported to track progress toward meeting the 2020 Programmatic Initiative.

<sup>3</sup> PG&E did not track ineligible and unwilling customers prior to 2009. "Ineligible" customers are those that were not successfully enrolled due to income verification failure or to a technical infeasibility. "Unwilling" customers are those that specifically state that they are not interested or that request to be added to our "do not call" list. The number reported in this column does not include non-responses to mailings, canvassing or other attempted contacts.

<sup>4</sup> Based on Attachment F of D.12-08-044.

ESA Table 4C			
Year	Utility in Shared Service Territory	Eligible Households in Shared Service Territory	Eligible households treated by both utilities in shared service territory
2014	SCG	100,755	2,536
2014	SCE	5,558	256
2014	SDG&E	0	0



# Pacific Gas and Electric Company

## PY 2014 Energy Savings Assistance Program Annual Report

### ESA Table 5

#### Direct Purchases & Installation Contractors

Contractor	County	Contractor Type				2014 Annual Expenditures
		Private	CBO	WMDVBE	LIHEAP	
<b>HVAC Contractors</b>						
AAA Air Conditioning	Fresno, Madera, Stanislaus, Merced, San Joaquin	X				\$ 319,059
Acosta Heating Air Conditioning	San Francisco, Marin	X				\$ 18,541
Action Air	Fresno, Madera, Kings	X				\$ 49,951
Agbayani Construction	Alameda, Contra Costa, Fresno, Kern, Kings, Marin, Mendocino, Monterey, Napa, San Benito, Santa Clara, Shasta, Solano, Sonoma, Yolo, Santa Clara	X		X		\$ 726,832
Air Tech Heating & Air Conditioning	San Joaquin, Sacramento	X				\$ 274,207
Airco Heating & Cooling	Kern	X				\$ 59,674
Airtec Services	Monterey, Santa Cruz, San Benito	X				\$ 140,036
All Bay Heating	Alameda, Contra Costa, San Joaquin, Santa Clara	X				\$ 447,515
Allied Aire Services	Alameda, Santa Clara	X				\$ 58,200
Barker Mechanical Services	Alameda, Contra Costa	X				\$ 176,153
Bay Area Energy Group	Santa Clara	X				\$ 111,101
Bellows Plumbing Heating & Sewer	Santa Clara, Santa Cruz, Monterey, San Benito	X				\$ 247,643
Bickley's Air Conditioning & Heating	Tehama, Shasta, Humboldt	X				\$ 249,437
FTE General Contractors	Sacramento, San Joaquin, Solano, Yolo	X				\$ 355,317
Feather River Aire	Butte, Colusa, El Dorado, Glenn, Lassen, Nevada, Placer, Plumas, Sacramento, Shasta, Sierra, Solano, Sutter, Tehama, Trinity, Yolo, Yuba	X				\$ 34,890
Lovotti Air / Lovotti, Inc.	Yolo, Solano, Amador, Butte, Calaveras, Colusa, El Dorado, Glenn, Madera, Mariposa, Merced, Nevada, Placer, Plumas, Sacramento, San Joaquin, Stanislaus, Sutter, Tehama, Tulare, Tuolumne, Yuba, San Joaquin, Stanislaus	X				\$ 2,498,717
Pelle Heat & Air Conditioning	Santa Clara	X				\$ 275,708
Queirolo's Heating and Air Conditioning	San Joaquin	X		X		\$ 33,670
Plumbline Plumbing, Inc.	Fresno, Madera, Kings	X				\$ 67,075
Reliable Energy	Kern	X		X		\$ 161,060
Residential Weatherization, Inc.	Butte, Yuba, Sutter	X		X		\$ 4,038
Roman's Heating & Air	San Joaquin, Sacramento	X		X		\$ 83,572
Santa Cruz Mechanical	Monterey, Santa Cruz, San Benito	X				\$ 145,277
Statewide Construction Services	Napa, Sonoma, Solano, Marin, Alameda, Contra Costa, San Joaquin	X				\$ 243,695
Synergy Companies	Alameda	X		X		\$ 21,841
Thomas Frank Heating & Air	Fresno, Madera, Kings	X				\$ 85,489
<b>Weatherization Contractors</b>						
Allen Temple Housing and Economic Development Corporation	Alameda	X				\$ 48,632
Altitude Global Energy, Inc.		X		X		\$ 134,358
American Eco Services	San Luis Obispo, Santa Barbara	X		X		\$ 823,151
American Insulation, Inc.	Merced, Stanislaus, San Joaquin	X		X		\$ 2,308,743
Applied Building Science	Lake, Mendocino	X				\$ 363,937
Atlas Systems, Inc.	Humboldt, Marin, Napa, Sonoma	X				\$ 2,708,156
Bay Area Energy Group	Santa Clara			X		\$ 4,314,013
Bo Enterprises	Alameda, Santa Clara, Santa Cruz	X				\$ 4,687,162

# Pacific Gas and Electric Company

## PY 2014 Energy Savings Assistance Program Annual Report

### ESA Table 5

#### Direct Purchases & Installation Contractors

Contractor	County	Contractor Type				2014 Annual Expenditures
		Private	CBO	WMDVBE	LIHEAP	
Bright Ideas Inc.	Merced	X				\$ 3,832,746
Community Action Agency of Butte County	Butte		X		X	\$ 1,486,241
Community Housing Opportunities Corp	Sacramento, San Joaquin, Solano, Yolo		X			\$ 4,470,550
California Human Development	Napa, Sonoma		X			\$ 1,003,090
California Plantinum Properties		X				\$ 374,394
Carroll Co.	Humboldt, Sacramento, Trinity	X				\$ 5,814,778
Community Development Commission of Mendocino	Lake, Mendocino		X			\$ 45,612
Community Action Partnership of San Luis Obispo County, Inc.	Monterey, San Luis Obispo, Santa Barbara		X		X	\$ 1,273,535
Community Energy Services Corporation	Alameda, Contra Costa, Marin		X			\$ 335,662
CWES, Inc.	Fresno	X		X		\$ 2,039,142
Eagle Systems dba Synergy Companies	Kern, San Bernardino	X				\$ 246,729
El Concilio of San Mateo County	San Mateo		X			\$ 1,294,569
Empire Insulation, Inc.	Sacramento	X				\$ 2,538,137
Energy Efficiency Inc. dba Synergy Energy Efficiency	Alameda, San Francisco, Santa Clara	X		X		\$ 9,163,462
Fresno County Economic Opportunity Commission	Fresno		X	X	X	\$ 4,291,866
Glenn County Human Resource Agency	Colusa, Glenn, Trinity		X		X	\$ 5,885
Highlands Energy Services, Inc.	San Joaquin, Stanislaus	X		X		\$ 8,303,132
Masco Contractor Service of CA		X				\$ 4,488,955
Naildown Construction	Madera, Mariposa, Merced, Sacramento	X		X		\$ 3,687,028
Pacific Coast Energy Conservation Services	Kern, San Bernardino	X				\$ 3,620,667
Project Go, Inc.			X			\$ 130,372
Proteus, Inc.	Kings, Tulare, Fresno		X			\$ 919,038
Quality Conservation Services	Alameda, Contra Costa, San Francisco, Santa Clara	X				\$ 9,462,635
Residential Weatherization, Inc.	Colusa, Glenn, Lake, Lassen, Nevada, Placer, Plumas, Shasta, Sierra, Siskiyou, Sutter, Tehama, Yuba, Yolo	X		X		\$ 5,582,365
Self-Help Home Improvement Project, Inc.	Shasta, Tehama,		X		X	\$ 832,708
Silicon Valley Foundation	Santa Clara	X				\$ 2,096,250
Soleeva Enegy Inc	Santa Clara, Alameda	X				\$ 306,195
Staples & Associates, Inc.	Alpine, Amador, El Dorado, Alpine, Amador, Calaveras, El Dorado, Kern, Monterey, Nevada, San Benito, Santa Cruz, Kern, Monterey, Nevada, San Benito, Santa Cruz	X				\$ 7,180,627
Sundowner Insulation Co.	Calaveras, San Bernardino, Tuolumne	X				\$ 1,165,144
Western Insulation, Inc.	Merced, Sacramento, San Benito, San Joaquin, Solano, Yolo, Stanislaus	X				\$ 1,213,459
Winegard Energy, Inc.	Fresno, Kern, Kings, Madera, Mariposa, Merced	X		X		\$ 4,724,729

# Pacific Gas and Electric Company

## PY 2014 Energy Savings Assistance Program Annual Report

### ESA Table 5

#### Direct Purchases & Installation Contractors

Contractor	County	Contractor Type				2014 Annual Expenditures
		Private	CBO	WMDVBE	LIHEAP	
<b>Refrigerator Contractors</b>						
Standards of Excellence	Alameda, Alpine, Amador, Butte, Calaveras, Colusa, Contra Costa, El Dorado, Glenn, Humboldt, Lake, Lassen, Marin, Mendocino, Napa, Nevada, Placer, Plumas, Sacramento, San Francisco, San Joaquin, San Mateo, Santa Clara, Shasta, Sierra, Siskiyou, Solano, Sonoma, Stanislaus, Sutter	X				\$ 8,361,331
Ventura TV & Appliance Center	Fresno, Kern, Kings, Madera, Mariposa, Merced, Monterey, San Benito, San Bernardino, San Luis Obispo, Santa Barbara, Santa Cruz, Tulare	X				\$ 6,324,403
<b>LIHEAP Leveraging Contractors</b>						
Amador-Tuolumne Community Action	Amador, Tuolumne, Calaveras		X		X	\$ 19,200
Central Coast Energy Services	Monterey, San Benito, Santa Clara, Santa Cruz		X		X	\$ 25,600
Project GO, Inc.	Placer		X		X	\$ 10,400
Redwood Community Action Agency	Humboldt		X		X	\$ 40,000
San Joaquin County Human Services	San Joaquin		X		X	\$ -

# Pacific Gas and Electric Company

PY 2014 Energy Savings Assistance Program Annual Report  
ESA Table 6  
Cost of Program Installation Contractors

	Unit of Measure	CBO/WMDVBE						Non-CBO/WMDVBE						2014 Program Total				
		Installations		Dwellings		Costs		Installations		Dwellings		Costs		Units Installed	Households	Costs <sup>1,4</sup>	Cost/ Unit	Cost/ Household
		Units	%	Units	%	\$	%	Units	%	Units	%	\$	%					
<b>Appliances</b>																		
High Efficiency Clothes Washer	Each																	
Refrigerators	Each	0	0.0%	0	0.0%	0	0.0%	17,401	100.0%	17,401	100.0%	16,325,166	100.0%	17,401	17,401	16,325,166	\$ 938.17	\$ 938.17
Evaporative Coolers (Replacement)	Each	3,202	59.0%	3,202	59.1%	2,076,972	59.0%	2,221	41.0%	2,220	40.9%	1,440,648	41.0%	5,423	5,422	3,517,621	\$ 648.65	\$ 648.77
Microwaves	Each	10,376	46.9%	10,376	46.9%	906,718	46.9%	11,750	53.1%	11,748	53.1%	1,026,786	53.1%	22,126	22,124	1,933,504	\$ 87.39	\$ 87.39
<b>Domestic Hot Water</b>																		
Water Heater Blanket	Each	15,112	52.5%	15,016	52.5%	906,160	52.5%	13,666	47.5%	13,575	47.5%	819,454	47.5%	28,778	28,591	1,725,613	\$ 59.96	\$ 60.36
Low Flow Shower Head	Each	62,953	49.4%	45,424	49.6%	2,608,280	49.4%	64,476	50.6%	46,224	50.4%	2,671,381	50.6%	127,429	91,648	5,279,661	\$ 41.43	\$ 57.61
Water Heater Pipe Insulation	Home	1,443	58.5%	1,443	58.5%	29,580	58.5%	1,022	41.5%	1,022	41.5%	20,950	41.5%	2,465	2,465	50,530	\$ 20.50	\$ 20.50
Faucet Aerator	Home	47,602	51.6%	47,602	51.6%	879,085	51.6%	44,697	48.4%	44,697	48.4%	825,437	48.4%	92,299	92,299	1,704,523	\$ 18.47	\$ 18.47
Water Heater Repair/Repl 3	Each	52	3.8%	52	4.0%	38,488	3.8%	1,305	96.2%	1,255	96.0%	965,905	96.2%	1,357	1,307	1,004,393	\$ 740.16	\$ 768.47
Thermostatic Shower Valve	Each	50,395	49.5%	36,352	49.4%	1,095,703	49.5%	51,485	50.5%	37,290	50.6%	1,119,402	50.5%	101,880	73,642	2,215,105	\$ 21.74	\$ 30.08
<b>Enclosure</b>																		
Air Sealing / Envelope	Home	43,528	50.3%	43,528	50.3%	18,654,478	50.3%	42,929	49.7%	42,929	49.7%	18,397,769	49.7%	86,457	86,457	37,052,246	\$ 428.56	\$ 428.56
Caulking	Home																	
Weatherstripping	Home																	
Utility Gaskets	Home																	
Attic Access Weatherstripping	Home																	
Evaporative Cooler Cover	Home																	
AC Vent Cover	Each																	
Attic Insulation	Home	2,255	51.1%	2,255	51.1%	3,683,194	51.1%	2,160	48.9%	2,160	48.9%	3,528,027	48.9%	4,415	4,415	7,211,221	\$ 1,633.35	\$ 1,633.35
<b>HVAC</b>																		
FAU Standing Pilot Light Conversion	Each																	
Furnace Repair/Replacement 2	Each	137	6.2%	133	6.5%	168,762	6.2%	2,086	93.8%	1,900	93.5%	2,569,616	93.8%	2,223	2,033	2,738,378	\$ 1,231.84	\$ 1,346.96
Room A/C Replacement	Each	815	63.7%	815	63.7%	737,810	63.7%	465	36.3%	465	36.3%	420,959	36.3%	1,280	1,280	1,158,769	\$ 905.29	\$ 905.29
Central A/C Replacement	Each	0	0.0%	0	0.0%	0	0.0%	29	100.0%	28	100.0%	54,723	100.0%	29	28	54,723	\$ 1,887.00	\$ 1,954.40
Central A/C Tune-up	Home	1,695	16.1%	1,659	16.2%	422,726	16.1%	8,802	83.9%	8,566	83.8%	2,195,184	83.9%	10,497	10,225	2,617,910	\$ 249.40	\$ 256.03
Duct Testing and Sealing 5	Home	2,190	63.3%	2,190	63.3%	1,407,674	63.3%	1,270	36.7%	1,270	36.7%	816,322	36.7%	3,460	3,460	2,223,997	\$ 642.77	\$ 642.77
<b>Maintenance</b>																		
Furnace Clean and Tune	Home																	
<b>Lighting</b>																		
Compact Fluorescent Lights (CFLs)	Each	219,624	49.5%	47,400	49.1%	1,777,496	49.5%	223,958	50.5%	49,108	50.9%	1,812,573	50.5%	443,582	96,508	3,590,069	\$ 8.09	\$ 37.20
Interior Hard wired CFL fixtures	Each	97,445	49.6%	39,400	50.0%	8,103,256	49.6%	99,093	50.4%	39,413	50.0%	8,240,300	50.4%	196,538	78,813	16,343,556	\$ 83.16	\$ 207.37
Exterior Hard wired CFL fixtures	Each	15,286	44.5%	15,280	44.6%	1,284,235	44.5%	19,044	55.5%	18,970	55.4%	1,599,959	55.5%	34,330	34,250	2,884,195	\$ 84.01	\$ 84.21
Torchiere	Each	3,185	45.0%	3,185	45.0%	262,082	45.0%	3,894	55.0%	3,894	55.0%	320,423	55.0%	7,079	7,079	582,505	\$ 82.29	\$ 82.29
Occupancy Sensor	Each	5,541	46.5%	4,173	46.9%	336,457	46.5%	6,375	53.5%	4,733	53.1%	387,099	53.5%	11,916	8,906	723,557	\$ 60.72	\$ 81.24
LED Night Lights	Each																	
<b>Miscellaneous</b>																		
Pool Pumps	Each																	
Smart Power Strips	Each	2,658	54.2%	2,656	54.2%	113,790.51	54.2%	2,243	45.8%	2,243	45.8%	96,024.12	45.8%	4,901	4,899	209,815	\$ 42.81	\$ 42.83
<b>New Measure</b>																		
AC FAN DELAY	Each	2	0.2%	2	0.2%	165	0.2%	1,021	99.8%	999	99.8%	84,204	99.8%	1,023	1,001	84,368	\$ 82.47	\$ 84.28
<b>Customer Enrollment</b>																		
Outreach & Assessment	Home													123,539	123,539	1,335,355	\$ 10.81	\$ 10.81
In-Home Education	Home													123,539	123,539	13,232,259	\$ 107.20	\$ 107.20
	Home																	
<b>Customer Enrollment</b>																		
Outreach & Assessment	Home													123,566	123,566	1,335,219	\$ 10.81	\$ 10.81
In-Home Education	Home													123,566	123,566	13,246,228	\$ 107.20	\$ 107.20

<sup>1</sup> These costs exclude PG&E support costs that are included in Table 1.

<sup>2</sup> Furnaces includes costs for service calls.

<sup>3</sup> Water Heater Replacement - Gas includes costs of water heater repair.

<sup>4</sup> Table 6 is less than Table 5 due to costs in Table 5 such as NGAT test, support allocations, penalties/credits and Training No Shows.

<sup>5</sup> Includes the Costs of duct tests but duct tests only are not counted in Units.

# Pacific Gas and Electric Company

## PY 2014 Energy Savings Assistance Program Annual Report

### ESA Table 7

#### Expenditures Recorded by Cost Element

ESA Program:	Labor <sup>1</sup>	Non-Labor <sup>2</sup>	Contractor <sup>3</sup>	Total
<b>Energy Efficiency</b>				
Appliances	\$ -		\$ 19,831,996	\$ 19,831,996
Domestic Hot Water	\$ -		\$ 12,544,636	\$ 12,544,636
Enclosure	\$ -		\$ 47,017,283	\$ 47,017,283
HVAC	\$ -		\$ 12,758,549	\$ 12,758,549
Maintenance	\$ -		\$ -	\$ -
Lighting	\$ -		\$ 25,456,980	\$ 25,456,980
Miscellaneous	\$ -		\$ -	\$ -
Customer Enrollment	\$ -		\$ 1,416,456	\$ 1,416,456
In Home Education	\$ -		\$ 14,014,305	\$ 14,014,305
Pilot	\$ -		\$ -	\$ -
<b>Energy Efficiency TOTAL</b>	\$ -	\$ -	<b>\$ 133,040,205</b>	<b>\$ 133,040,205</b>
Training Center	\$ 351,162	\$ 55,181	\$ 299,793	\$ 706,136
Inspections	\$ 5,578,565	\$ 358,293	\$ 31,610	\$ 5,968,469
Marketing and Outreach	\$ 225,193	\$ 709,639	\$ 853,275	\$ 1,788,107
Statewide Marketing Education and Outreach	\$ -	\$ -	\$ -	\$ -
Measurement and Evaluation Studies	\$ -		\$ -	\$ -
Regulatory Compliance	\$ 319,022	\$ 4,863	\$ 195	\$ 324,080
General Administration	\$ 3,135,075	\$ 53,413	\$ 902,819	\$ 4,091,307
CPUC Energy Division	\$ -	\$ 22,145	\$ -	\$ 22,145
<b>TOTAL PROGRAM COSTS</b>	<b>\$ 9,609,017</b>	<b>\$ 1,203,535</b>	<b>\$ 135,127,898</b>	<b>\$ 145,940,449</b>

<sup>1</sup> Labor costs include any internal direct (administrative and/or implementation) costs (indirect costs are a separate line item), burdened by overhead, that represents person hours.

<sup>2</sup> Non-Labor costs include all direct internal (administrative and/or implementation) costs (indirect costs are given as a separate line item).

<sup>3</sup> Contract costs include all outsourced costs (administrative and/or implementation). Contract costs do not need to be further broken out by labor/non-labor. This category includes agency employees.

# Pacific Gas and Electric Company

## PY 2014 Energy Savings Assistance Program Annual Report

### ESA Table 8

#### Homes Unwilling<sup>1</sup> / Unable to Participate

Reason Provided								
County	Customer/Landlord Declined Program Measure or is Non-Responsive	Customer Unavailable - Scheduling Conflicts	Hazardous Environment (unsafe/unclean)	Insufficient feasible Measures	Ineligible Dwelling - Prior Program Participation or Dwelling Age	Household Income Exceeds Allowable Limits	Unable to Provide Required Documentation	Other
Alameda	165	500	0	75	0	20	108	
Alpine	0	0	0	0	0	0	0	
Amador	3	22	0	3	0	1	0	
Butte	39	237	0	32	0	6	8	
Calaveras	7	9	0	9	0	1	0	
Colusa	4	33	0	2	0	0	0	
Contra Costa	147	375	0	162	0	23	122	
El Dorado	13	31	0	17	0	2	1	
Fresno	311	551	0	191	0	18	62	
Glenn	3	18	0	0	0	0	1	
Humboldt	6	25	0	6	0	0	1	
Kern	156	276	2	186	0	4	36	
Kings	5	6	0	9	0	2	0	
Lake	0	0	0	2	0	1	0	
Lassen	0	0	0	0	0	0	0	
Madera	21	84	0	13	0	0	2	
Marin	0	25	0	1	0	0	0	
Mariposa	0	0	0	1	0	0	0	
Mendocino	0	7	0	1	0	0	0	
Merced	21	338	0	10	0	5	11	
Monterey	202	138	0	12	0	2	8	
Napa	10	38	0	6	0	1	0	
Nevada	7	68	0	3	0	1	0	
Placer	11	107	0	22	0	3	2	
Plumas	0	6	0	0	0	0	0	
Sacramento	198	302	1	16	0	6	45	
San Benito	18	19	0	2	0	0	5	
San Bernardino	0	1	0	0	0	0	0	
San Francisco	57	183	0	9	0	2	11	
San Joaquin	125	820	0	45	0	20	14	
San Luis Obispo	3	7	0	18	0	0	3	
San Mateo	86	79	0	11	0	2	2	
Santa Barbara	0	0	0	1	0	0	0	
Santa Clara	202	746	0	44	0	11	27	
Santa Cruz	70	89	0	7	0	2	8	
Shasta	8	37	0	5	0	1	2	
Sierra	0	0	0	0	0	0	0	
Siskiyou	0	0	0	0	0	0	0	
Solano	70	113	0	61	0	10	38	
Sonoma	33	123	0	21	0	4	1	
Stanislaus	31	241	0	8	0	8	4	
Sutter	3	102	0	0	0	2	0	
Tehama	1	95	0	0	0	0	1	
Trinity	0	0	0	0	0	0	0	
Tulare	17	19	0	8	0	0	2	
Tuolumne	2	17	0	7	0	0	0	
Yolo	62	63	0	21	0	0	1	
Yuba	4	96	0	0	0	1	1	
<b>Total</b>	<b>2,121</b>	<b>6,046</b>	<b>3</b>	<b>1,047</b>	<b>-</b>	<b>159</b>	<b>527</b>	

<sup>1</sup> Per D.12-08-031 OP.16, PG&E continues to use the current CPUC-authorized 5% unwillingness factor for the 2012-2014 ESA Program.

# Pacific Gas and Electric Company

## PY 2014 Energy Savings Assistance Program Annual Report

### ESA Table 9

#### Life Cycle Bill Savings by Measure

Measure Description		2014 Number Installed	Per Measure Electric Impact (kWh)	Per Measure Gas Impact (Therms)	Effective Useful Life (EUL)	2014 Total Measure Life Cycle Bill Savings
<b>Appliances</b>						
High Efficiency Clothes Washer	Each					
Refrigerators	Each	17,401	709.17	-	15	\$ 13,392,026.70
Evaporative Cooler (Replacement)	Each	5,423	517.73	-	15	\$ 3,046,922.50
Microwaves	Each	22,126	130.59	8.28	15	\$ 4,727,473.63
<b>Domestic Hot Water</b>						
Water Heater Blanket	Each	28,778	5.19	5.31	5	\$ 639,345.42
Low Flow Shower Head	Each	127,429	9.72	5.55	10	\$ 5,642,346.86
Water Heater Pipe Insulation	Home	2,465	3.33	6.12	15	\$ 139,961.88
Faucet Aerator	Home	92,299	2.07	2.68	5	\$ 1,010,263.51
Water Heater Repair/Replacement	Each	1,357	-	-	13	\$ -
Thermostatic Shower Valve [7]	Each	101,880	0.30	1.64	8	\$ 943,415.31
<b>Enclosure</b>						
Air Sealing / Envelope [1]	Home	86,457	52.66	4.80	7	\$ 4,862,897.09
Caulking	Home					
Weatherstripping	Home					
Utility Gaskets	Home					
Attic Access Weatherstripping	Home					
Evaporative Cooler Cover	Home					
AC Vent Cover	Each					
Attic Insulation	Home	4,415	92.01	12.04	20	\$ 1,072,551
<b>HVAC</b>						
FAU Standing Pilot Light Conversion	Each					
Furnace Repair/Replacement	Each	2,223	-	-	16	\$ -
Room A/C Replacement	Each	1,280	78.32	-	15	\$ 108,786
Central A/C Replacement	Each	29	61.11	-	18	\$ 2,152
Central A/C Tune-up	Home	10,497	3.88	-	15	\$ 44,201
Duct Testing and Sealing	Home	3,460	-	-	25	\$ -
<b>Maintenance</b>						
Furnace Clean and Tune	Home					
<b>Lighting</b>						
Compact Fluorescent Lights (CFLs)	Each	443,582	13.80	-	8	\$ 4,206,339
Interior Hard wired CFL fixtures	Each	196,538	43.12	-	16	\$ 9,582,041
Exterior Hard wired CFL fixtures	Each	34,330	43.20	-	20	\$ 1,912,335
Torchiere	Each	7,079	203.89	-	9	\$ 1,087,824
Occupancy Sensor	Each	11,916	39.90	-	8	\$ 326,664
LED Night Lights	Each					
<b>Miscellaneous</b>						
Pool Pumps	Each					
Smart Power Strips	Each	4,901	24.30	-	8	\$ 98,314
<b>New Measure</b>						
AC Time Delay [8]	Each	1,023	194.43	-	10	\$ 162,453
<b>Total Homes Served By the Program</b>	<b>123,539</b>					
<b>Life Cycle Bill Savings Per Home</b>						<b>\$ 429.08</b>



# Pacific Gas and Electric Company

## PY 2014 Energy Savings Assistance Program Annual Report

### ESA Table 10

#### Energy Rate Used for Bill Savings Calculations

Year	\$/kWh <sup>1</sup>	\$/Therm
2014	0.1032	0.8490
2015	0.1063	0.8490
2016	0.1095	0.8745
2017	0.1128	0.9007
2018	0.1161	0.9277
2019	0.1196	0.9555
2020	0.1232	0.9842
2021	0.1269	1.0137
2022	0.1307	1.0441
2023	0.1346	1.0755
2024	0.1387	1.1077
2025	0.1428	1.1410
2026	0.1471	1.1752
2027	0.1515	1.2105
2028	0.1561	1.2468
2029	0.1608	1.2842
2030	0.1656	1.3227
2031	0.1706	1.3624
2032	0.1757	1.4032
2033	0.1809	1.4453
2034	0.1864	1.4887
2035	0.1920	1.5334
2036	0.1977	1.5794
2037	0.2037	1.6267
2038	0.2098	1.6756

<sup>1</sup> For 2014 the average cost per kWh paid by participants. Cost is escalated 3% annually in 24 subsequent years.



# Pacific Gas and Electric Company

## PY 2014 Energy Savings Assistance Program Annual Report

### ESA Table 11

#### Bill Savings Calculations by Program Year

Program Year	Program Costs	Program Lifecycle Bill Savings	Program Bill Savings/ Cost Ratio	Per Home Average Lifecycle Bill
2011	\$ 145,900,978	\$ 58,889,388	0.40	\$ 460
2012	\$ 131,145,519	\$ 44,191,560	0.34	\$ 384
2013	\$ 142,181,389	\$ 54,007,801	0.38	\$ 437

Pacific Gas and Electric Company

PY2014 Energy Savings Assistance Prorgam Annual Report  
ESA Table 12  
Fund Shifting

		Budget			Expenditures			(Shift) or Carried Forward			FUND SHIFT AMOUNT									Total Shifted Gas/ Electric <sub>1</sub>	% of Authorized Total	Fund Shifting Source 1. Current Year Authorized 2. Carried Forward 3. Carried Back	To/From Year	Fund Shift Description	Authorization
Date	Program Year 2014	Electric	Gas	Total Authorized	Electric	Gas	Total Expenditures	Variance			(1) Shift of Current Year Authorized			(2) Shift of Carry Forward			(3) Shift of Carry Back								
								Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total						
	ESA Program:																								
	Energy Efficiency																								
December-2014	Appliance	\$ 34,907,105	\$ 2,627,416	\$ 37,534,521	\$ 19,120,852	\$ 711,144	\$ 19,831,996	\$ 15,786,252	\$ 1,916,272	\$ 17,702,525	\$ (5,088,533)	\$ (1,419,615)	\$ (6,508,148)							\$ 6,508,148	4%	1.Current Year Authorized 2. 3.	1.From 2014 2. 3.	1. To HVAC-electric and gas 2. 3.	1. D.12-08-044 2. 3.
December-2014	Domestic Hot Water	\$ 924,532	\$ 9,757,809	\$ 10,682,341	\$ 840,776	\$ 11,703,860	\$ 12,544,636	\$ 83,756	\$ (1,946,051)	\$ (1,862,296)				\$ -	\$ 1,946,051	\$ 1,946,051						1. Current Year Authorized 2. Carried Forward 3.	1. To 2014 2. From 2009-2011 3.	1. 2. From 2009-2011 3.	1. D.12-08-044 2. 3.
	Enclosure	\$ 7,457,463	\$ 41,793,263	\$ 49,250,726	\$ 7,052,592	\$ 39,964,690	\$ 47,017,283	\$ 404,871	\$ 1,828,572	\$ 2,233,443												1. 2. 3.	1. 2. 3.	1. 2. 3.	1. D.12-08-044 2. 3.
December-2014	HVAC	\$ 2,685,301	\$ 2,661,646	\$ 5,346,947	\$ 7,773,834	\$ 4,984,715	\$ 12,758,549	\$ (5,088,533)	\$ (2,323,069)	\$ (7,411,601)	\$ 5,088,533	\$ 1,419,615	\$ 6,508,148	\$ -	\$ 903,454	\$ 903,454						1.Current Year Authorized 2.Carried Forward 3.	1.To 2014 2.From 2009-2011 3.	1. From Appliances 2. From 2009-2011 3.	1. D.12-08-044 2. 3.
	Maintenance	\$ -	\$ -	\$ -	\$ -		\$ -	\$ -	\$ -	\$ -												1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Lighting	\$ 28,575,478	\$ -	\$ 28,575,478	\$ 25,456,980	\$ -	\$ 25,456,980	\$ 3,118,498	\$ -	\$ 3,118,498												1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Miscellaneous	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -												1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Customer Enrollment	\$ 1,155,071	\$ 621,961	\$ 1,777,032	\$ 920,697	\$ 495,760	\$ 1,416,456	\$ 234,374	\$ 126,201	\$ 360,576												1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	In Home Education <sup>2</sup>	\$ 9,917,891	\$ 5,340,403	\$ 15,258,294	\$ 9,109,298	\$ 4,905,007	\$ 14,014,305	\$ 808,593	\$ 435,396	\$ 1,243,990												1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Pilot <sup>2</sup>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -												1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Energy Efficiency TOTAL	\$ 85,622,841	\$ 62,802,498	\$ 148,425,339	\$ 70,275,030	\$ 62,765,176	\$ 133,040,205	\$ 15,347,811	\$ 37,323	\$ 15,385,134	\$ -	\$ -	\$ -	\$ -	\$ 2,849,505	\$ 2,849,505				\$ 6,508,148	4%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Training Center <sup>2</sup>	\$ 676,925	\$ 372,394	\$ 1,049,319	\$ 458,988	\$ 247,148	\$ 706,136	\$ 217,937	\$ 125,246	\$ 343,183												1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Inspections <sup>2</sup>	\$ 4,613,647	\$ 2,616,909	\$ 2,616,909	\$ 3,879,505	\$ 2,088,964	\$ 5,968,469	\$ 734,142	\$ 527,945	\$ 1,262,087												1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Marketing and Outreach <sup>2</sup>	\$ 1,260,017	\$ 683,134	\$ 1,943,151	\$ 1,162,269	\$ 625,837	\$ 1,788,107	\$ 97,747	\$ 57,297	\$ 155,044												1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Statewide ME&O <sup>2</sup>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -												1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	M&E Studies <sup>2</sup>	\$ 133,250	\$ 71,750	\$ 205,000	\$ -	\$ -	\$ -	\$ 133,250	\$ 71,750	\$ 205,000												1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Regulatory Compliance <sup>2</sup>	\$ 275,649	\$ 154,832	\$ 430,480	\$ 210,652	\$ 113,428	\$ 324,080	\$ 64,997	\$ 41,404	\$ 106,400												1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	General Administration <sup>2</sup>	\$ 2,865,222	\$ 1,615,712	\$ 4,480,934	\$ 2,659,350	\$ 1,431,958	\$ 4,091,307	\$ 205,872	\$ 183,755	\$ 389,627												1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	CPUC Energy Division <sup>2</sup>	\$ 35,750	\$ 19,250	\$ 55,000	\$ 14,394	\$ 7,751	\$ 22,145	\$ 21,356	\$ 11,499	\$ 32,855												1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	TOTAL PROGRAM COSTS	\$ 95,483,300	\$ 68,336,479	\$ 163,819,779	\$ 78,660,188	\$ 67,280,261	\$ 145,940,449	\$ 16,823,112	\$ 1,056,218	\$ 17,879,330	\$ -	\$ -	\$ -		\$ 2,849,505	\$ 2,849,505				\$ 6,508,148	4%				
	Carry Forward from 2009-2011	\$ -	\$ -	\$ -					\$ 2,849,505	\$ 2,849,505															
	Carry Back from PY	\$ -	\$ -	\$ -																					
	TOTAL PROGRAM INCLUDING CARRY FORWARD and FUND SHIFTING	\$ 95,483,300	\$ 68,336,479	\$ 163,819,779	\$ 78,660,188	\$ 67,280,261	\$ 145,940,449	\$ 16,823,112	\$ 3,905,723	\$ 20,728,835															

<sup>1</sup> Numbers reported in standard accounting format, with negative amounts displayed in parentheses (\$xxx).  
<sup>2</sup> Prior written authorization from the Commission is required before the utilities can shift into or out of these categories.

**Note:** This Table does not include prior cycle's unspent funds.

# Pacific Gas and Electric Company

**PY 2014 Energy Savings Assistance Program Annual Report**  
**ESA Table 13**  
**Categorical Enrollment**

Type of Enrollment	Number of customers treated <sup>1</sup>
80/20	30
Allensworth/Alpaugh	3
CARE Income Qualified	9,734
Food Stamps	5,675
Head Start - Tribal	4
Healthy Families	182
Indian Affairs General Assistance	18
Issuance History	1
LIHEAP	17
Medi-Cal	2,607
NSL - Free Lunch	1,039
Qualified Public Housing	269
SSI	9,768
TANF	1,305
WIC	14,578
Zip - 7	2,706

<sup>1</sup> Number of customers treated reflects categorical programs selected by customer. Please note in some case customer select more than one eligible program for a single account.

Pacific Gas Electric Company

PY 2014 Energy Savings Assistance Program Annual Report

ESA Table 14

Leveraging & Integration

Coordination Type <sup>1</sup>	Partner	Brief Description of Effort	Relationship outside the IOU?	MOU Present?	Amount of Dollars Saved <sup>2</sup>	Amount of Energy Savings <sup>3</sup>	Other Measureable Benefits <sup>3</sup>	Enrollments Resulting from Leveraging Effort <sup>4</sup>	Methodology <sup>5</sup>	Meets all Criteria	If not, Explain
Program Coordination	Applied Building Science	We refer every EP customer to the programs listed in the Integrated s brochure, including REACH & HEAP & Lifeline. Sent out brochures in all POW's mailed. Field CSR is handing out Integrated brochures with every door hanger.	Yes	Yes	\$ -	Unknown	Unknown	109 ESA enrolled participants referred to LIHEAP, REACH, Lifeline and Library Services		N	Unknown amount of energy or dollar savings
Program Coordination	American Eco Services	Coordination with So Cal Gas	Yes	Yes	\$ -	Unknown	Unknown	161		N	Unknown amount of energy or dollar savings
Program Coordination	American Insulation	Coordination with LIHEAP and Modesto Irrigation District	Yes	Yes	\$ -	Unknown	203 ESA enrolled participants referred to Modesto Irrigation District	28 ESA enrolled participants referred to LIHEAP		N	Unknown amount of energy or dollar savings
Program Coordination	Allen Temple Housing	ES are outreaching for the ESA and CARE programs	Yes	Yes	\$ -		Unknown	189 Leveraged		N	Unknown amount of energy or dollar savings
Program Coordination	Atlas	Coordination with LIHEAP	Yes	Yes	\$ -	Unknown	Unknown	489 ESA enrolled participants referred to LIHEAP		N	Unknown amount of energy or dollar savings
Program Coordination	Bright Ideas Inc	Coordination with LIHEAP	Yes	Yes	\$ -	Unknown	Unknown	95 ESA enrolled participants referred to LIHEAP and 50 to REACH		N	Unknown amount of energy or dollar savings
Program Coordination	BUTTE	Coordination with LIHEAP	Yes	Yes	\$ -	Unknown	Unknown	12 ESA enrolled participants referred to LIHEAP		N	Unknown amount of energy or dollar savings
Program Coordination	Community Action Partnership of SLO, Inc.	Coordination with SoCal Gas	Yes	Yes	\$ -	Unknown	Unknown	311 ESA enrolled participants referred to So Cal Gas		N	Unknown amount of energy or dollar savings
Program Coordination	Community Development of Mendocino County	CDC continued utilizing existing relationships with local governments to outreach to potential low income customers.	Yes	Yes	\$ -	Unknown	Unknown	714 ESA enrolled participants were referred to Federal LIHEAP but no contacts with LIHEAP		N	Unknown amount of energy or dollar savings
Program Coordination	Community Energy Services Corp (CESC)	Coordination with LIHEAP	Yes	Yes	\$ -	Unknown	Unknown	17 ESA enrolled participants referred to Contra Costa Home Repair Program and 1 referred to Oakland Home Repair		N	Unknown amount of energy or dollar savings
Program Coordination	CHOC	Coordination with LIHEAP	Yes	Yes	\$ -	Unknown	Unknown	10 ESA enrolled participants referred to HEAP		N	Unknown amount of energy or dollar savings
Program Coordination	El Concilio	Coordination with LIHEAP	Yes	Yes	\$ -	Unknown	Unknown	110 ESA enrolled participants referred to DOE,LIHEAP, HEAP		N	Unknown amount of energy or dollar savings
Program Coordination	Empire	Coordination with LIHEAP	Yes	Yes	\$ -	Unknown	Unknown	24 ESA enrolled participants referred to LIHEAP		N	Unknown amount of energy or dollar savings
Program Coordination	Fresno County Economic Opportunities Commission/Sundowner	Coordination with LIHEAP	Yes	Yes	\$ -	Unknown	Unknown	2,702 ESA enrolled participants referred to LIHEAP/DOE		N	Unknown amount of energy or dollar savings
Program Coordination	QCS	Energy Efficiency, Inc. provided the insulation work and QCS provided the weatherization.	Yes	Yes	\$ -	Unknown	Unknown	642 ESA enrolled participants referred to QCS		N	Unknown amount of energy or dollar savings
Program Coordination	RWI	Coordination with LIHEAP	Yes	Yes	\$ -	Unknown	Unknown	7 ESA enrolled participants referred to LIHEAP		N	Unknown amount of energy or dollar savings
Program Coordination	SHHIP	Coordination with LIHEAP	Yes	Yes	\$ -	Unknown	Unknown	52 ESA enrolled participants referred to LIHEAP		N	Unknown amount of energy or dollar savings
Program Coordination	Staples	Coordination with SoCal Gas	Yes	Yes	\$ -	Unknown	Unknown	3 ESA enrolled participants referred to So Cal Gas		N	Unknown amount of energy or dollar savings

Pacific Gas Electric Company

PY 2014 Energy Savings Assistance Program Annual Report

ESA Table 14

Leveraging & Integration

Coordination Type <sup>1</sup>	Partner	Brief Description of Effort	Relationship outside the IOU?	MOU Present?	Amount of Dollars Saved <sup>2</sup>	Amount of Energy Savings <sup>3</sup>	Other Measureable Benefits <sup>3</sup>	Enrollments Resulting from Leveraging Effort <sup>4</sup>	Methodology <sup>5</sup>	Meets all Criteria	If not, Explain
Program Coordination	Sundowner	Coordination with LIHEAP	Yes	Yes	\$ -	Unknown	Unknown	1,577 ESA enrolled participants referred to LIHEAP and DOE		N	Unknown amount of energy or dollar savings
Program Coordination	Synergy	Coordination with SCE	Yes	Yes	\$ -	Unknown	Unknown	223 ESA enrolled participants referred to SCE		N	Unknown amount of energy or dollar savings
Program Coordination	Winegard	Coordination with LIHEAP	Yes	Yes	\$ -	Unknown	Unknown	22 ESA enrolled participants referred to So Cal Gas and 2 referred to LIHEAP		N	Unknown amount of energy or dollar savings
Refrigerator Leveraging Project	Amadore-Tuolumne Community Action Agency	Refrigerator Leveraging Contract	Yes	Yes	\$ -	Unknown	Unknown	Installed 24 refrigerators at \$800/refrigerator = \$19,2000		N	Unknown amount of energy or dollar savings
Refrigerator Leveraging Project	Central Coast Energy Services	Refrigerator Leveraging Contract	Yes	Yes	\$ -	Unknown	Unknown	Installed 32refrigerators at \$800/refrigerator = \$25,600		N	Unknown amount of energy or dollar savings
Refrigerator Leveraging Project	Project GO	Refrigerator Leveraging Contract	Yes	Yes	\$ -	Unknown	Unknown	Installed 13 refrigerators at \$800/refrigerator = \$10,400		N	Unknown amount of energy or dollar savings
Refrigerator Leveraging Project	Redwood Community Action Agency	Refrigerator Leveraging Contract	Yes	Yes	\$ -	Unknown	Unknown	Installed 50 refrigerators at \$800/refrigerator = \$40,000		N	Unknown amount of energy or dollar savings
Refrigerator Leveraging Project	San Joaquin Human Services Agency	Refrigerator Leveraging Contract	Yes	Yes	\$ -	Unknown	Unknown	Installed 0 refrigerators at \$800/refrigerator = \$0		N	Unknown amount of energy or dollar savings
ME&O	Internal	CARE Community Outreach Contractors received Integrated s brochures for distribution	No	No	\$ -	N/A	N/A	Unknown		N	Unknown amount of energy or dollar savings
Program Coordination	Internal	The ESA Program team worked with the Local Government Partnership team to offer the Moderate Income Direct Install (MIDI) program to customers who fell slightly above the income- guidelines for ESA.	No	No	\$ -	N/A	N/A	3,578 homes treated		N	Unknown amount of dollar savings
Program Coordination	Internal	Multifamily Energy Efficiency Rebate Program (MFEER)- offers property owners and managers incentives for installing energy efficient measures, slated for the retrofit of existing multifamily properties of two or more units. ESAP outreach is integrated into outreach for MFEER. CARE/FERA programs and ESAP are also promoted at MFEER outreach events and property owner/manager conferences. Income-eligible residents may enroll in ESAP to receive measures not provided by the MFEER program.	No	No	\$ -	N/A	N/A	Unknown		N	Unknown amount of dollar savings
Program Coordination	Internal	PG&E worked with the Demand Response team to include SmartAC in the local roll-outs of ESA Program. The two teams are also working together to ensure opportunities for enrollment in SmartAC are not missed when PG&E contractors install energy efficiency measures.	No	No	\$ -	N/A	N/A	1,224 SmartAC units were installed as part of the leveraging efforts between the ESA Program and the SmartAC team.		N	Unknown amount of dollar savings
Data Sharing	Internal	Integrating CARE enrollment lists into ESA Program outreach	No	No	\$ -	N/A	ESA Program implementation contractors are provided lists of customers enrolled in CARE but not ESA Program	Unknown		N	Unknown amount of dollar or energy savings

Pacific Gas Electric Company

PY 2014 Energy Savings Assistance Program Annual Report  
ESA Table 14  
Leveraging & Integration

Coordination Type <sup>1</sup>	Partner	Brief Description of Effort	Relationship outside the IOU?	MOU Present?	Amount of Dollars Saved <sup>2</sup>	Amount of Energy Savings <sup>3</sup>	Other Measureable Benefits <sup>3</sup>	Enrollments Resulting from Leveraging Effort <sup>4</sup>	Methodology <sup>5</sup>	Meets all Criteria	If not, Explain
Interdepartmental	Internal	Marketing collateral integration	No	No	\$ -	N/A	ESA Program program produces brochure listing most PG&E customer assistance programs and provides information about HEAP.	Unknown		N	Unknown amount of dollar or energy savings

<sup>1</sup> Leveraging, Interdepartmental integration, Program Coordination, Data Sharing, ME&O, etc.

<sup>2</sup> Leveraging and Integration efforts are measurable and quantifiable in terms of dollars saved by the IOU (Shared/contributed/donated resources, shared marketing materials, shared information technology, shared programmatic infrastructure, among others are just some examples of cost and/or resource savings to the IOU).

<sup>3</sup> Energy savings/benefits. Leveraging efforts are measurable and quantifiable in terms of home energy benefits/ savings to the eligible households.

<sup>4</sup> Enrollment increases. Leveraging efforts are measurable and quantifiable in terms of program enrollment increases and/or customers served.

<sup>5</sup> In footnotes, provide information on methodology used to calculate cost and/or resource savings.

# Pacific Gas and Electric Company

## PY 2014 Energy Savings Assistance Program Annual Report

### ESA Table 15

#### Lighting

ESA Program CFL Tracking Table					
<i>Instructions: Please identify the CFL bulbs used within your ESA program and fill in the remaining columns for each</i>					
Bulb Name / Identification	Bulb Description (wattage, lumens)	Bulb Cost (material)	Admin Cost (overhead, contractor fee, marketing, etc.)	Total Bulb Cost (material + admin)	AB 1109 Compliant? <sup>1</sup>
Autocell	23W/1600L	\$ 2.60	\$ 5.18	\$ 7.78	Yes
Autocell	27W/1750L	\$ 2.60	\$ 5.18	\$ 7.78	Yes
Energetic Lighting	11W/720L	\$ 2.16	\$ 5.18	\$ 7.34	Unknown
Energetic Lighting	13W/825L	\$ 2.16	\$ 5.18	\$ 7.34	Unknown
Energetic Lighting	15W/820L	\$ 2.39	\$ 5.18	\$ 7.57	Unknown
Energetic Lighting	19W/1250L	\$ 2.39	\$ 5.18	\$ 7.57	Unknown
Energetic Lighting	23W/1250L	\$ 2.60	\$ 5.18	\$ 7.78	Unknown
Energetic Lighting	23W/1600L	\$ 2.60	\$ 5.18	\$ 7.78	Unknown
Maxlite	18W/2850L	\$ 2.39	\$ 5.18	\$ 7.57	Yes
Maxlite	18W/2900L	\$ 2.39	\$ 5.18	\$ 7.57	Yes
Maxlite	26W/2850L	\$ 2.60	\$ 5.18	\$ 7.78	Unknown
Maxlite	26W/2900L	\$ 2.60	\$ 5.18	\$ 7.78	Unknown
Maxlite	36W/2400L	\$ 2.60	\$ 5.18	\$ 7.78	Unknown
Maxlite	45W/2850L	\$ 2.60	\$ 5.18	\$ 7.78	Unknown
Maxlite	45W/2900L	\$ 2.60	\$ 5.18	\$ 7.78	Unknown
Maxlite	75W/1200L	\$ 2.60	\$ 5.18	\$ 7.78	Unknown
TCP	13W/900L	\$ 2.16	\$ 5.18	\$ 7.34	Yes
TCP	16W/750L	\$ 2.39	\$ 5.18	\$ 7.57	Yes
TCP	18W/1200L	\$ 2.39	\$ 5.18	\$ 7.57	Yes
TCP	19W/950L	\$ 2.39	\$ 5.18	\$ 7.57	Yes
TCP	23W/1200L	\$ 2.60	\$ 5.18	\$ 7.78	Yes
TCP	23W/1600L	\$ 2.60	\$ 5.18	\$ 7.78	Yes
TCP	75W/1200L	\$ 2.60	\$ 5.18	\$ 7.78	Yes

Year	Number of Homes Treated in ESA Program	Number of Homes Provided CFLs	Avg. # of CFL bulbs given per home	Est. total energy savings from installed CFLs <sup>2,3</sup>
2009	81,308	69,970	4.57	5.12
2010	133,329	109,663	4.69	8.23
2011	128,071	105,849	4.69	7.95
2012	115,229	91,906	4.67	5.88
2013	123,566	92,655	4.56	5.84
2014	123,539	96,508	4.60	6.12

<sup>1</sup> Compliant in regards to: 1) Do bulbs meet or exceed CEC energy efficiency standards for general purpose lighting?

Do all models comply with Europe's RoHS standards on toxicity?

<sup>2</sup> Energy savings used are from the Load Impact Evaluation of the 2009 Energy Savings Assistance Program.

<sup>3</sup> Energy savings in gWh



# Pacific Gas and Electric Company

## PY 2014 Energy Savings Assistance Program Annual Report

ESA Table 16

### "Add Back" Measures

Measure	Climate Zone	Ratio of Benefits Over Costs			Quantity Installed	Budget Impact of "Add Back"	LC_Energy Savings Impact
		Utility Cost Test	Modified Participant Test	Total Resource Cost Test			
A/C Replacement-Room w/CZ13 w/MF	13	-	-	-	25	\$ 6,235	\$ -
A/C Replacement-Room w/CZ13 w/MH	13	-	-	-	150	\$ 37,409	\$ -
A/C Replacement-Room w/CZ13 w/SF	13	0.54	0.63	0.41	1,104	\$ 275,333	\$ 120,340
Air Slg/Envelope : ESH w/CZ1 w/MF	1	-	-	-	30	\$ 12,857	\$ -
Air Slg/Envelope : ESH w/CZ1 w/MF W/AC	1	0.00	0.00	0.00	21	\$ 9,000	\$ 5
Air Slg/Envelope : ESH w/CZ1 w/MH	1	-	-	-	5	\$ 2,143	\$ -
Air Slg/Envelope : ESH w/CZ1 w/SF	1	-	-	-	69	\$ 29,571	\$ -
Air Slg/Envelope : ESH w/CZ1 w/SF W/AC	1	0.00	0.00	0.00	39	\$ 16,714	\$ 10
Air Slg/Envelope : ESH w/CZ11 w/MF	11	-	-	-	7	\$ 3,000	\$ -
Air Slg/Envelope : ESH w/CZ11 w/MH	11	-	-	-	35	\$ 15,000	\$ -
Air Slg/Envelope : ESH w/CZ11 w/SF	11	-	-	-	72	\$ 30,857	\$ -
Air Slg/Envelope : ESH w/CZ12 w/MF	12	-	-	-	272	\$ 116,569	\$ -
Air Slg/Envelope : ESH w/CZ12 w/MH	12	-	-	-	3	\$ 1,286	\$ -
Air Slg/Envelope : ESH w/CZ12 w/SF	12	-	-	-	107	\$ 45,856	\$ -
Air Slg/Envelope : ESH w/CZ13 w/MF	13	-	-	-	22	\$ 9,428	\$ -
Air Slg/Envelope : ESH w/CZ13 w/MH	13	-	-	-	5	\$ 2,143	\$ -
Air Slg/Envelope : ESH w/CZ13 w/SF	13	-	-	-	67	\$ 28,714	\$ -
Air Slg/Envelope : ESH w/CZ16 w/MH	16	-	-	-	5	\$ 2,143	\$ -
Air Slg/Envelope : ESH w/CZ16 w/SF	16	-	-	-	18	\$ 7,714	\$ -
Air Slg/Envelope : ESH w/CZ2 w/MF	2	-	-	-	145	\$ 62,142	\$ -
Air Slg/Envelope : ESH w/CZ2 w/MF W/AC	2	0.07	0.09	0.05	187	\$ 80,141	\$ 3,058
Air Slg/Envelope : ESH w/CZ2 w/MH	2	-	-	-	18	\$ 7,714	\$ -
Air Slg/Envelope : ESH w/CZ2 w/MH W/AC	2	0.07	0.09	0.05	46	\$ 19,714	\$ 753
Air Slg/Envelope : ESH w/CZ2 w/SF	2	-	-	-	144	\$ 61,713	\$ -
Air Slg/Envelope : ESH w/CZ2 w/SF W/AC	2	0.07	0.09	0.05	281	\$ 120,426	\$ 4,595
Air Slg/Envelope : ESH w/CZ3 w/MF	3A	-	-	-	2,668	\$ 1,143,405	\$ -
Air Slg/Envelope : ESH w/CZ3 w/MF	3B	-	-	-	903	\$ 386,992	\$ -
Air Slg/Envelope : ESH w/CZ3 w/MF W/AC	3A	0.04	0.05	0.03	62	\$ 26,571	\$ 548
Air Slg/Envelope : ESH w/CZ3 w/MF W/AC	3B	0.04	0.05	0.03	74	\$ 31,714	\$ 705
Air Slg/Envelope : ESH w/CZ3 w/MH	3A	-	-	-	11	\$ 4,714	\$ -
Air Slg/Envelope : ESH w/CZ3 w/MH	3B	-	-	-	7	\$ 3,000	\$ -
Air Slg/Envelope : ESH w/CZ3 w/SF	3A	-	-	-	289	\$ 123,855	\$ -
Air Slg/Envelope : ESH w/CZ3 w/SF	3B	-	-	-	224	\$ 95,998	\$ -
Air Slg/Envelope : ESH w/CZ3 w/SF W/AC	3A	0.04	0.05	0.03	17	\$ 7,286	\$ 150
Air Slg/Envelope : ESH w/CZ3 w/SF W/AC	3B	0.04	0.05	0.03	16	\$ 6,857	\$ 152
Air Slg/Envelope : ESH w/CZ4 w/MF	4	-	-	-	431	\$ 184,711	\$ -
Air Slg/Envelope : ESH w/CZ4 w/MF W/AC	4	0.08	0.10	0.05	525	\$ 224,995	\$ 9,018
Air Slg/Envelope : ESH w/CZ4 w/MH	4	-	-	-	21	\$ 9,000	\$ -
Air Slg/Envelope : ESH w/CZ4 w/MH W/AC	4	0.08	0.10	0.05	6	\$ 2,571	\$ 104
Air Slg/Envelope : ESH w/CZ4 w/SF	4	-	-	-	192	\$ 82,284	\$ -
Air Slg/Envelope : ESH w/CZ4 w/SF W/AC	4	0.08	0.10	0.05	81	\$ 34,714	\$ 1,391
Air Slg/Envelope : ESH w/CZ5 w/MF	5	-	-	-	553	\$ 236,995	\$ -
Air Slg/Envelope : ESH w/CZ5 w/MF W/AC	5	-	-	-	17	\$ 7,286	\$ -
Air Slg/Envelope : ESH w/CZ5 w/SF	5	-	-	-	55	\$ 23,571	\$ -
Air Slg/Envelope : ESH w/CZ5 w/SF W/AC	5	-	-	-	2	\$ 857	\$ -
Air Slg/Envelope : GSH w/CZ1 w/MF	1	0.02	0.03	0.01	101	\$ 43,285	\$ 519
Air Slg/Envelope : GSH w/CZ11 w/MF	11	0.01	0.02	0.01	27	\$ 11,571	\$ 84
Air Slg/Envelope : GSH w/CZ12 w/MF	12	0.01	0.01	0.01	324	\$ 138,854	\$ 903
Air Slg/Envelope : GSH w/CZ13 w/MF	13	0.01	0.01	0.01	81	\$ 34,714	\$ 200
Air Slg/Envelope : GSH w/CZ2 w/MF	2	0.01	0.02	0.01	214	\$ 91,712	\$ 699
Air Slg/Envelope : GSH w/CZ3 w/MF	3A	0.01	0.02	0.01	4,402	\$ 1,886,533	\$ 13,206
Air Slg/Envelope : GSH w/CZ3 w/MF	3B	0.01	0.02	0.01	1,440	\$ 617,130	\$ 4,320
Air Slg/Envelope : GSH w/CZ3 w/MF W/AC	3A	0.05	0.05	0.03	95	\$ 40,713	\$ 1,124
Air Slg/Envelope : GSH w/CZ3 w/MF W/AC	3B	0.05	0.05	0.04	120	\$ 51,428	\$ 1,503
Air Slg/Envelope : GSH w/CZ4 w/MF	4	0.01	0.01	0.01	1,302	\$ 557,989	\$ 3,488
Air Slg/Envelope : GSH w/CZ4 w/MF W/AC	4	0.08	0.07	0.06	220	\$ 94,284	\$ 4,368
Air Slg/Envelope : OGS w/CZ12 w/MF	12	0.01	0.01	0.01	1	\$ 429	\$ 3
Air Slg/Envelope : OGS w/CZ4 w/MF W/AC	4	0.08	0.07	0.06	1	\$ 429	\$ 19
Attic Insulation : ESH w/o AC w/CZ5 w/MF	5	-	-	-	3	\$ 4,900	\$ -
Attic Insulation : GSH w/AC w/CZ2 w/MF	2	0.13	0.10	0.09	2	\$ 3,267	\$ 262



# Pacific Gas and Electric Company

## PY 2014 Energy Savings Assistance Program Annual Report

### ESA Table 16

#### "Add Back" Measures

Measure	Climate Zone	Ratio of Benefits Over Costs			Quantity Installed	Budget Impact of "Add Back"	LC_Energy Savings Impact
		Utility Cost Test	Modified Participant Test	Total Resource Cost Test			
Attic Insulation : GSH w/AC w/CZ3 w/MF	3A	0.10	0.08	0.07	1	\$ 1,633	\$ 92
Attic Insulation : GSH w/AC w/CZ3 w/MF	3B	0.11	0.08	0.07	1	\$ 1,633	\$ 94
Attic Insulation : GSH w/AC w/CZ3 w/SF	3A	0.20	0.17	0.13	32	\$ 52,267	\$ 6,068
Attic Insulation : GSH w/AC w/CZ3 w/SF	3B	0.21	0.17	0.14	65	\$ 106,167	\$ 12,492
Attic Insulation : GSH w/AC w/CZ4 w/MF	4	0.13	0.09	0.09	5	\$ 8,167	\$ 595
Attic Insulation : GSH w/o AC w/CZ11 w/SF	11	0.18	0.15	0.12	34	\$ 55,534	\$ 5,508
Attic Insulation : GSH w/o AC w/CZ12 w/MF	12	0.06	0.05	0.04	2	\$ 3,267	\$ 111
Attic Insulation : GSH w/o AC w/CZ12 w/SF	12	0.16	0.13	0.10	172	\$ 280,935	\$ 24,525
Attic Insulation : GSH w/o AC w/CZ13 w/SF	13	0.14	0.12	0.09	64	\$ 104,534	\$ 8,103
Attic Insulation : GSH w/o AC w/CZ16 w/SF	16	0.18	0.15	0.11	4	\$ 6,533	\$ 632
Attic Insulation : GSH w/o AC w/CZ2 w/MF	2	0.07	0.06	0.05	7	\$ 11,433	\$ 453
Attic Insulation : GSH w/o AC w/CZ2 w/SF	2	0.19	0.16	0.12	93	\$ 151,901	\$ 15,783
Attic Insulation : GSH w/o AC w/CZ3 w/MF	3A	0.07	0.06	0.04	22	\$ 35,934	\$ 1,303
Attic Insulation : GSH w/o AC w/CZ3 w/MF	3B	0.07	0.06	0.04	43	\$ 70,234	\$ 2,543
Attic Insulation : GSH w/o AC w/CZ3 w/SF	3A	0.17	0.14	0.11	389	\$ 635,371	\$ 60,376
Attic Insulation : GSH w/o AC w/CZ3 w/SF	3B	0.17	0.14	0.11	318	\$ 519,404	\$ 49,364
Attic Insulation : GSH w/o AC w/CZ4 w/MF	4	0.06	0.05	0.04	94	\$ 153,534	\$ 4,949
Attic Insulation : GSH w/o AC w/CZ4 w/SF	4	0.15	0.13	0.10	493	\$ 805,239	\$ 68,145
Attic Insulation : OGS w/AC w/CZ3 w/SF	3A	0.21	0.17	0.14	1	\$ 1,633	\$ 186
Attic Insulation : OGS w/o AC w/CZ13 w/SF	13	0.15	0.12	0.09	1	\$ 1,633	\$ 124
Attic Insulation : OGS w/o AC w/CZ4 w/SF	4	0.16	0.13	0.10	1	\$ 1,633	\$ 136
Duct Sealing - ESH & AC w/CZ11 w/SF	11	-	-	-	4	\$ 2,571	\$ -
Duct Sealing - ESH & AC w/CZ12 w/MH	12	-	-	-	1	\$ 643	\$ -
Duct Sealing - ESH & AC w/CZ12 w/SF	12	-	-	-	12	\$ 7,713	\$ -
Duct Sealing - ESH & AC w/CZ13 w/MH	13	-	-	-	1	\$ 643	\$ -
Duct Sealing - ESH & AC w/CZ13 w/SF	13	-	-	-	7	\$ 4,499	\$ -
Duct Sealing - ESH & AC w/CZ16 w/MH	16	-	-	-	1	\$ 643	\$ -
Duct Sealing - ESH & AC w/CZ4 w/SF	4	-	-	-	1	\$ 643	\$ -
Duct Sealing - ESH w/o AC w/CZ11 w/MH	11	-	-	-	1	\$ 643	\$ -
Duct Sealing - ESH w/o AC w/CZ12 w/SF	12	-	-	-	3	\$ 1,928	\$ -
Duct Sealing - ESH w/o AC w/CZ3 w/SF	3A	-	-	-	1	\$ 643	\$ -
Duct Sealing - ESH w/o AC w/CZ4 w/SF	4	-	-	-	3	\$ 1,928	\$ -
Duct Sealing - GSH & AC w/CZ11 w/MH	11	-	-	-	8	\$ 5,142	\$ -
Duct Sealing - GSH & AC w/CZ11 w/SF	11	-	-	-	37	\$ 23,783	\$ -
Duct Sealing - GSH & AC w/CZ12 w/MH	12	-	-	-	30	\$ 19,283	\$ -
Duct Sealing - GSH & AC w/CZ12 w/SF	12	-	-	-	1,837	\$ 1,180,775	\$ -
Duct Sealing - GSH & AC w/CZ13 w/MH	13	-	-	-	3	\$ 1,928	\$ -
Duct Sealing - GSH & AC w/CZ13 w/SF	13	-	-	-	336	\$ 215,972	\$ -
Duct Sealing - GSH & AC w/CZ2 w/MH	2	-	-	-	1	\$ 643	\$ -
Duct Sealing - GSH & AC w/CZ3 w/MH	3B	-	-	-	1	\$ 643	\$ -
Duct Sealing - GSH & AC w/CZ3 w/SF	3A	-	-	-	35	\$ 22,497	\$ -
Duct Sealing - GSH & AC w/CZ3 w/SF	3B	-	-	-	59	\$ 37,924	\$ -
Duct Sealing - GSH & AC w/CZ4 w/SF	4	-	-	-	80	\$ 51,422	\$ -
Duct Sealing - GSH w/o AC w/CZ11 w/MH	11	-	-	-	1	\$ 643	\$ -
Duct Sealing - GSH w/o AC w/CZ11 w/SF	11	-	-	-	1	\$ 643	\$ -
Duct Sealing - GSH w/o AC w/CZ12 w/MH	12	-	-	-	2	\$ 1,286	\$ -
Duct Sealing - GSH w/o AC w/CZ12 w/SF	12	-	-	-	353	\$ 226,899	\$ -
Duct Sealing - GSH w/o AC w/CZ13 w/SF	13	-	-	-	7	\$ 4,499	\$ -
Duct Sealing - GSH w/o AC w/CZ2 w/SF	2	-	-	-	5	\$ 3,214	\$ -
Duct Sealing - GSH w/o AC w/CZ3 w/MH	3A	-	-	-	1	\$ 643	\$ -
Duct Sealing - GSH w/o AC w/CZ3 w/MH	3B	-	-	-	4	\$ 2,571	\$ -
Duct Sealing - GSH w/o AC w/CZ3 w/SF	3A	-	-	-	247	\$ 158,765	\$ -
Duct Sealing - GSH w/o AC w/CZ3 w/SF	3B	-	-	-	173	\$ 111,200	\$ -
Duct Sealing - GSH w/o AC w/CZ4 w/MH	4	-	-	-	1	\$ 643	\$ -
Duct Sealing - GSH w/o AC w/CZ4 w/SF	4	-	-	-	203	\$ 130,483	\$ -

# Pacific Gas and Electric Company

## PY 2014 Energy Savings Assistance Program Annual Report

ESA Table 16

### "Add Back" Measures

Measure	Climate Zone	Ratio of Benefits Over Costs			Quantity Installed	Budget Impact of "Add Back"	LC_Energy Savings Impact
		Utility Cost Test	Modified Participant Test	Total Resource Cost Test			
Faucet Aerator MF/CZ-All/Elec	1	-	-	-	44	\$ 813	\$ -
Faucet Aerator MF/CZ-All/Elec	11	-	-	-	133	\$ 2,456	\$ -
Faucet Aerator MF/CZ-All/Elec	12	-	-	-	617	\$ 11,394	\$ -
Faucet Aerator MF/CZ-All/Elec	13	-	-	-	432	\$ 7,978	\$ -
Faucet Aerator MF/CZ-All/Elec	16	-	-	-	4	\$ 74	\$ -
Faucet Aerator MF/CZ-All/Elec	2	-	-	-	159	\$ 2,936	\$ -
Faucet Aerator MF/CZ-All/Elec	3A	-	-	-	904	\$ 16,695	\$ -
Faucet Aerator MF/CZ-All/Elec	3B	-	-	-	345	\$ 6,371	\$ -
Faucet Aerator MF/CZ-All/Elec	4	-	-	-	222	\$ 4,100	\$ -
Faucet Aerator MF/CZ-All/Elec	5	-	-	-	290	\$ 5,356	\$ -
HTG Sys Repair/Replace : GSH w/CZ1 w/MH	1	0.15	0.04	-	2	\$ 2,464	\$ -
HTG Sys Repair/Replace : GSH w/CZ1 w/SF	1	0.15	0.04	-	12	\$ 14,782	\$ -
HTG Sys Repair/Replace : GSH w/CZ11 w/MH	11	0.15	0.04	-	18	\$ 22,173	\$ -
HTG Sys Repair/Replace : GSH w/CZ11 w/SF	11	0.15	0.04	-	86	\$ 105,938	\$ -
HTG Sys Repair/Replace : GSH w/CZ12 w/MH	12	0.15	0.04	-	86	\$ 105,938	\$ -
HTG Sys Repair/Replace : GSH w/CZ12 w/SF	12	0.15	0.04	-	772	\$ 950,980	\$ -
HTG Sys Repair/Replace : GSH w/CZ13 w/MF	13	0.15	0.04	-	3	\$ 3,696	\$ -
HTG Sys Repair/Replace : GSH w/CZ13 w/MH	13	0.15	0.04	-	22	\$ 27,100	\$ -
HTG Sys Repair/Replace : GSH w/CZ13 w/SF	13	0.15	0.04	-	309	\$ 380,638	\$ -
HTG Sys Repair/Replace : GSH w/CZ16 w/SF	16	0.15	0.04	-	8	\$ 9,855	\$ -
HTG Sys Repair/Replace : GSH w/CZ2 w/MH	2	0.15	0.04	-	8	\$ 9,855	\$ -
HTG Sys Repair/Replace : GSH w/CZ2 w/SF	2	0.15	0.04	-	93	\$ 114,561	\$ -
HTG Sys Repair/Replace : GSH w/CZ3 w/MF	3A	0.15	0.04	-	3	\$ 3,696	\$ -
HTG Sys Repair/Replace : GSH w/CZ3 w/MF	3B	0.15	0.04	-	4	\$ 4,927	\$ -
HTG Sys Repair/Replace : GSH w/CZ3 w/MH	3A	0.15	0.04	-	5	\$ 6,159	\$ -
HTG Sys Repair/Replace : GSH w/CZ3 w/MH	3B	0.15	0.04	-	39	\$ 48,042	\$ -
HTG Sys Repair/Replace : GSH w/CZ3 w/SF	3A	0.15	0.04	-	182	\$ 224,195	\$ -
HTG Sys Repair/Replace : GSH w/CZ3 w/SF	3B	0.15	0.04	-	256	\$ 315,351	\$ -
HTG Sys Repair/Replace : GSH w/CZ4 w/MH	4	0.15	0.04	-	36	\$ 44,346	\$ -
HTG Sys Repair/Replace : GSH w/CZ4 w/SF	4	0.15	0.04	-	278	\$ 342,451	\$ -
HTG Sys Repair/Replace : OGS w/CZ2 w/MH	2	0.15	0.04	-	1	\$ 1,232	\$ -
Low Flow Shower Head MF/CZ-All/Elec	1	1.94	7.49	1.18	34	\$ 1,409	\$ 4,479
Low Flow Shower Head MF/CZ-All/Elec	11	1.94	7.49	1.18	98	\$ 4,060	\$ 12,925
Low Flow Shower Head MF/CZ-All/Elec	12	1.94	7.49	1.17	626	\$ 25,937	\$ 81,434
Low Flow Shower Head MF/CZ-All/Elec	13	1.94	7.49	1.16	431	\$ 17,857	\$ 54,405
Low Flow Shower Head MF/CZ-All/Elec	16	1.93	7.49	1.18	4	\$ 166	\$ 532
Low Flow Shower Head MF/CZ-All/Elec	2	1.94	7.49	1.17	146	\$ 6,049	\$ 18,953
Low Flow Shower Head MF/CZ-All/Elec	3A	1.95	7.49	1.15	839	\$ 34,762	\$ 101,531
Low Flow Shower Head MF/CZ-All/Elec	3B	1.94	7.49	1.17	387	\$ 16,034	\$ 50,229
Low Flow Shower Head MF/CZ-All/Elec	4	1.94	7.49	1.17	335	\$ 13,880	\$ 42,759
Low Flow Shower Head MF/CZ-All/Elec	5	1.94	7.49	1.17	256	\$ 10,607	\$ 33,052
Low Flow Shower Head MF/CZ-All/Gas	1	1.36	2.98	0.84	154	\$ 6,381	\$ 8,551
Low Flow Shower Head MF/CZ-All/Gas	11	1.36	2.98	0.84	1,353	\$ 56,058	\$ 75,103
Low Flow Shower Head MF/CZ-All/Gas	12	1.36	2.98	0.84	8,336	\$ 345,379	\$ 462,727
Low Flow Shower Head MF/CZ-All/Gas	13	1.36	2.98	0.84	3,080	\$ 127,611	\$ 170,969
Low Flow Shower Head MF/CZ-All/Gas	System	1.36	2.98	0.84	6	\$ 249	\$ 335
Low Flow Shower Head MF/CZ-All/Gas	16	1.36	2.98	0.84	12	\$ 497	\$ 666
Low Flow Shower Head MF/CZ-All/Gas	2	1.36	2.98	0.84	750	\$ 31,074	\$ 41,634
Low Flow Shower Head MF/CZ-All/Gas	3A	1.36	2.98	0.84	6,248	\$ 258,868	\$ 346,823
Low Flow Shower Head MF/CZ-All/Gas	3B	1.36	2.98	0.84	2,896	\$ 119,988	\$ 160,756
Low Flow Shower Head MF/CZ-All/Gas	4	1.36	2.98	0.84	3,051	\$ 126,410	\$ 169,361
Water Heater Blanket MF/CZ-All/Elec	1	-	-	-	9	\$ 540	\$ -
Water Heater Blanket MF/CZ-All/Elec	11	-	-	-	37	\$ 2,219	\$ -
Water Heater Blanket MF/CZ-All/Elec	12	-	-	-	92	\$ 5,517	\$ -
Water Heater Blanket MF/CZ-All/Elec	13	-	-	-	62	\$ 3,718	\$ -

# Pacific Gas and Electric Company

## PY 2014 Energy Savings Assistance Program Annual Report

ESA Table 16

### "Add Back" Measures

Measure	Climate Zone	Ratio of Benefits Over Costs			Quantity Installed	Budget Impact of "Add Back"	LC_Energy Savings Impact
		Utility Cost Test	Modified Participant Test	Total Resource Cost Test			
Water Heater Blanket MF/CZ-All/Elec	16	-	-	-	2	\$ 120	\$ -
Water Heater Blanket MF/CZ-All/Elec	2	-	-	-	27	\$ 1,619	\$ -
Water Heater Blanket MF/CZ-All/Elec	3A	-	-	-	8	\$ 480	\$ -
Water Heater Blanket MF/CZ-All/Elec	3B	-	-	-	5	\$ 300	\$ -
Water Heater Blanket MF/CZ-All/Elec	4	-	-	-	7	\$ 420	\$ -
Water Heater Blanket MF/CZ-All/Elec	5	-	-	-	58	\$ 3,478	\$ -
Water Heater Pipe Insulation MF/CZ-All/Elec	1	-	-	-	20	\$ 410	\$ -
Water Heater Pipe Insulation MF/CZ-All/Elec	11	-	-	-	44	\$ 902	\$ -
Water Heater Pipe Insulation MF/CZ-All/Elec	12	-	-	-	67	\$ 1,373	\$ -
Water Heater Pipe Insulation MF/CZ-All/Elec	13	-	-	-	54	\$ 1,107	\$ -
Water Heater Pipe Insulation MF/CZ-All/Elec	16	-	-	-	2	\$ 41	\$ -
Water Heater Pipe Insulation MF/CZ-All/Elec	2	-	-	-	38	\$ 779	\$ -
Water Heater Pipe Insulation MF/CZ-All/Elec	3A	-	-	-	1	\$ 20	\$ -
Water Heater Pipe Insulation MF/CZ-All/Elec	3B	-	-	-	8	\$ 164	\$ -
Water Heater Pipe Insulation MF/CZ-All/Elec	4	-	-	-	1	\$ 20	\$ -
Water Heater Pipe Insulation MF/CZ-All/Elec	5	-	-	-	64	\$ 1,312	\$ -
Water Heater Pipe Insulation MH/CZ-All/Elec	1	0.77	0.74	0.46	1	\$ 20	\$ 10
Water Heater Pipe Insulation MH/CZ-All/Elec	11	0.76	0.74	0.46	23	\$ 471	\$ 238
Water Heater Pipe Insulation MH/CZ-All/Elec	12	0.76	0.74	0.46	8	\$ 164	\$ 82
Water Heater Pipe Insulation MH/CZ-All/Elec	13	0.75	0.74	0.45	5	\$ 102	\$ 49
Water Heater Pipe Insulation MH/CZ-All/Elec	16	0.75	0.74	0.46	2	\$ 41	\$ 21
Water Heater Pipe Insulation MH/CZ-All/Elec	2	0.76	0.74	0.45	17	\$ 348	\$ 173
Water Heater Pipe Insulation MH/CZ-All/Elec	3B	0.77	0.74	0.46	1	\$ 20	\$ 10
Water Heater Pipe Insulation MH/CZ-All/Elec	4	0.74	0.74	0.45	2	\$ 41	\$ 20
Water Heater Pipe Insulation MH/CZ-All/Elec	5	0.77	0.74	0.46	1	\$ 20	\$ 10
Water Heater Pipe Insulation SF/CZ-All/Elec	1	0.46	0.39	0.28	68	\$ 1,394	\$ 374
Water Heater Pipe Insulation SF/CZ-All/Elec	11	0.46	0.39	0.28	410	\$ 8,405	\$ 2,258
Water Heater Pipe Insulation SF/CZ-All/Elec	12	0.46	0.39	0.28	256	\$ 5,248	\$ 1,391
Water Heater Pipe Insulation SF/CZ-All/Elec	13	0.46	0.39	0.27	75	\$ 1,537	\$ 396
Water Heater Pipe Insulation SF/CZ-All/Elec	16	0.47	0.39	0.28	113	\$ 2,316	\$ 627
Water Heater Pipe Insulation SF/CZ-All/Elec	2	0.46	0.39	0.28	279	\$ 5,719	\$ 1,513
Water Heater Pipe Insulation SF/CZ-All/Elec	3A	0.45	0.39	0.26	4	\$ 82	\$ 20
Water Heater Pipe Insulation SF/CZ-All/Elec	3B	0.46	0.39	0.28	28	\$ 574	\$ 152
Water Heater Pipe Insulation SF/CZ-All/Elec	4	0.46	0.39	0.27	14	\$ 287	\$ 75
Water Heater Pipe Insulation SF/CZ-All/Elec	5	0.46	0.39	0.28	25	\$ 512	\$ 135
Water Heater Repair & Replacement - GWH	12	0.25	0.07	-	7	\$ 5,181	\$ -
Water Heater Repair & Replacement - GWH	13	0.24	0.07	-	2	\$ 1,480	\$ -
Water Heater Repair & Replacement - GWH	2	0.26	0.07	-	1	\$ 740	\$ -
Water Heater Repair & Replacement - GWH	3A	0.26	0.07	-	1	\$ 740	\$ -
Water Heater Repair & Replacement - GWH	3B	0.26	0.07	-	1	\$ 740	\$ -
Water Heater Repair & Replacement - GWH	4	0.26	0.07	-	1	\$ 740	\$ -
Water Heater Repair & Replacement - GWH	1	0.26	0.07	-	1	\$ 740	\$ -
Water Heater Repair & Replacement - GWH w/CZ w/MH	11	0.25	0.07	-	8	\$ 5,921	\$ -
Water Heater Repair & Replacement - GWH w/CZ w/MH	12	0.25	0.07	-	44	\$ 32,567	\$ -
Water Heater Repair & Replacement - GWH w/CZ w/MH	13	0.25	0.07	-	25	\$ 18,504	\$ -
Water Heater Repair & Replacement - GWH w/CZ w/MH	System	0.26	0.07	-	1	\$ 740	\$ -
Water Heater Repair & Replacement - GWH w/CZ w/MH	3A	0.25	0.07	-	4	\$ 2,961	\$ -
Water Heater Repair & Replacement - GWH w/CZ w/MH	3B	0.25	0.07	-	18	\$ 13,323	\$ -

# Pacific Gas and Electric Company

## PY 2014 Energy Savings Assistance Program Annual Report

### ESA Table 16

#### "Add Back" Measures

Measure	Ratio of Benefits Over Costs			Quantity Installed	Budget Impact of "Add Back"	LC_Energy Savings Impact
	Climate Zone	Utility Cost Test	Modified Participant Test			
Water Heater Repair & Replacement - GWH w/CZ w/MH	4	0.25	0.07	-	\$ 11,102	\$ -
Water Heater Repair & Replacement - GWH	1	0.25	0.07	-	\$ 8,142	\$ -
Water Heater Repair & Replacement - GWH	11	0.25	0.07	-	\$ 27,386	\$ -
Water Heater Repair & Replacement - GWH	12	0.25	0.07	-	\$ 369,338	\$ -
Water Heater Repair & Replacement - GWH	13	0.25	0.07	-	\$ 205,024	\$ -
Water Heater Repair & Replacement - GWH	16	0.26	0.07	-	\$ 740	\$ -
Water Heater Repair & Replacement - GWH	2	0.25	0.07	-	\$ 13,323	\$ -
Water Heater Repair & Replacement - GWH	3A	0.25	0.07	-	\$ 63,654	\$ -
Water Heater Repair & Replacement - GWH	3B	0.25	0.07	-	\$ 98,441	\$ -
Water Heater Repair & Replacement - GWH	4	0.25	0.07	-	\$ 122,866	\$ -

<sup>1</sup> Based on Appendix H.1 and H.2 in D.12-08-044. Add-back measures are measures having cost effectiveness below the 0.25 cost effectiveness threshold adopted in D.12-08-044. Add-backs include both measures requested by PG&E and included in its 2012-2014 ESA budget application, as well as measures ordered through D.12-08-044 that were not included in PG&E's budget application.

Pacific Gas and Electric Company

PY 2014 CARE Annual Report  
CARE Table 1  
Overall Program Expenses

Category	Overall [1]		Total [1]	Authorized Budget [1]	% of Budget Spent	Total Shifted[2]	Shifted to/from?
	Electric	Gas					
Outreach	\$ 4,565,152	\$ 1,070,838	\$ 5,635,990	\$ 5,846,455	96%	\$ (52,434)	To CHANGES Pilot Program and Measurement & Evaluation
Processing, Certification, Recertification	\$ 1,287,618	\$ 302,034	\$ 1,589,652	\$ 3,961,081	40%		
Post Enrollment Verification	\$ 1,033,025	\$ 242,315	\$ 1,275,340	\$ 2,097,136	61%	\$ (427,097)	To IT Programming
IT Programming	\$ 941,942	\$ 220,949	\$ 1,162,891	\$ 735,794	158%	\$ 427,097	From Post Enrollment Verification
Cool Centers	\$ 110,262	\$ -	\$ 110,262	\$ 134,904	82%		
CHANGES Pilot Program	\$ 202,695	\$ 47,546	\$ 250,241	\$ 222,491	112%	\$ 27,750	From Outreach
Measurement & Evaluation	\$ 58,874	\$ 13,810	\$ 72,684	\$ 48,000	151%	\$ 24,684	From Outreach
Regulatory Compliance	\$ 199,866	\$ 46,882	\$ 246,749	\$ 387,587	64%		
General Administration	\$ 1,533,849	\$ 359,792	\$ 1,893,641	\$ 2,229,066	85%		
CPUC Energy Division	\$ 35,960	\$ 8,435	\$ 44,395	\$ 128,000	35%		
TOTAL Program Costs	\$ 9,969,245	\$ 2,312,601	\$ 12,281,846	\$ 15,790,513	78%		
CARE Rate Discount	\$ 522,526,187	\$ 84,680,578	\$ 607,206,765	\$ 605,950,000	100%	\$ 1,256,765	
Service Establishment Charge Discount							
TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	\$ 532,495,432	\$ 86,993,179	\$ 619,488,611	\$ 621,740,513	100%		

[1] Program authorized budget per D.14-08-030 has been updated to include \$848,000 employee benefits costs approved in the GRC (D.14-08-032) - Decision Authorizing Pacific Gas and Electric Company's General Rate Case Revenue Requirement for 2014-2016, approved on August 14, 2014. Actual employee benefit burden costs have been included in the program expenses.

[2] Total program administrative expenses did not exceed the overall authorized budget. The CARE discount exceeded the authorized amount by \$1,256,765. Per D.02-09-021, PG&E is authorized to recover the full value of the discount through the CARE two-way balancing account on an automatic pass-through basis. The information in the "Total Shifted" and "Shifted to/from?" column is for illustrative purposes only, to disclose how funds from the overall authorized budget can be shifted between categories per Section 20.3.3 in D.08-11-031.



# Pacific Gas Electric Company

PY 2014 CARE Annual Report  
CARE Table 2  
Enrollment, Recertification, Attrition, & Penetration

2014	New Enrollment										Recertification				Attrition					Enrollment		Total CARE Participants	Estimated CARE Eligible	Penetration Rate % (W/X)
	Automatic Enrollment				Self-Certification (Income or Categorical)				Capitation	Total New Enrollment (E+I+J)	Scheduled	Non-Scheduled (Duplicates)	Automatic	Total Recertification (L+M+N)	No Response <sup>4</sup>	Failed PEV	Failed Recertification	Other <sup>5</sup>	Total Attrition (P+Q+R+S)	Gross (K+O)	Net Adjusted (K-T)			
	Inter-Utility <sup>1</sup>	Intra-Utility <sup>2</sup>	Leveraging <sup>3</sup>	Combined (B+C+D)	Online	Paper	Phone	Combined (F+G+H)																
January	0	154	0	154	16,861	10,687	865	28,413	61	28,628	25,607	8,260	12,287	46,154	n/a	6,779	11,600	12,353	30,732	74,782	-2,104	1,383,966	1,648,774	84%
February	0	5,241	0	5,241	12,293	8,167	485	20,945	94	26,280	24,234	5,681	21,427	51,342	n/a	5,486	13,736	12,420	31,642	77,622	-5,362	1,378,604	1,648,774	84%
March	0	2,622	0	2,622	15,098	8,230	3,524	26,852	155	29,629	23,116	7,624	9,791	40,531	n/a	10,494	12,822	14,069	37,385	70,160	-7,756	1,370,848	1,648,774	83%
April	0	3,039	0	3,039	11,278	12,005	388	23,671	190	26,900	24,691	7,391	10,624	42,706	n/a	7,588	6,258	10,230	24,076	69,606	2,824	1,373,672	1,648,774	83%
May	0	2,934	0	2,934	10,599	7,701	769	19,069	236	22,239	67,955	6,572	10,998	85,525	n/a	4,631	5,827	12,241	22,699	107,764	-460	1,373,212	1,648,774	83%
June	0	2,954	0	2,954	9,831	11,518	361	21,710	105	24,769	28,604	6,628	11,871	47,103	n/a	4,360	6,502	14,920	25,782	71,872	-1,013	1,372,199	1,648,774	83%
July	0	2,492	0	2,492	14,868	12,412	1,590	28,870	46	31,408	38,500	7,572	11,390	57,462	n/a	3,424	5,325	12,730	21,479	88,870	9,929	1,382,128	1,648,774	84%
August	0	2,633	0	2,633	14,164	15,865	2,602	32,631	62	35,326	30,554	8,213	11,507	50,274	n/a	3,608	4,985	15,317	23,910	85,600	11,416	1,393,544	1,648,774	85%
September	0	0	0	0	16,198	11,907	601	28,706	45	28,751	26,281	7,903	0	34,184	n/a	6,424	4,615	13,655	24,694	62,935	4,057	1,397,601	1,648,774	85%
October	0	4,718	0	4,718	13,302	17,710	1,164	32,176	30	36,924	27,470	9,849	23,315	60,634	n/a	7,980	6,474	13,322	27,776	97,558	9,148	1,406,749	1,648,774	85%
November	0	2,536	0	2,536	11,330	12,888	666	24,884	151	27,571	23,748	7,581	12,839	44,168	n/a	7,663	4,505	9,757	21,925	71,739	5,646	1,412,395	1,648,774	86%
December	0	2,192	0	2,192	9,955	14,142	1,007	25,104	62	27,358	27,694	9,811	11,977	49,482	n/a	8,298	6,378	11,743	26,419	76,840	939	1,413,334	1,648,774	86%
YTD Total	0	31,515	0	31,515	155,777	143,232	14,022	313,031	1,237	345,783	368,454	93,085	148,026	609,565	n/a	76,735	89,027	152,757	318,519	955,348	27,264	1,413,334	1,648,774	86%

<sup>1</sup> Enrollments via data sharing between the IOUs.  
<sup>2</sup> Enrollments via data sharing between departments and/or programs within the utility.  
<sup>3</sup> Enrollments via data sharing with programs outside the IOU that serve low-income customers.  
<sup>4</sup> PG&E counts attrition due to no response in the Failed PEV and Failed Recertification columns, respectively.  
<sup>5</sup> Includes customers who closed their accounts, requested to be removed, or were otherwise ineligible for the program.

# Pacific Gas and Electric Company

**CARE Table 3A**  
**Post-Enrollment Verification Results (Model)**

2014	Total CARE Households Enrolled	Households Requested to Verify	% of CARE Enrolled Requested to Verify	CARE Households De-Enrolled (Due to no response)	CARE Households De-Enrolled (Verified as Ineligible) <sup>1</sup>	Total Households De-Enrolled <sup>2</sup>	% De-enrolled through Post Enrollment Verification	% of Total CARE Households De-Enrolled
January	1,383,966	3,144	0.23%	2,031	112	2,143	68.16%	0.15%
February	1,378,604	1,713	0.12%	1,036	89	1,125	65.67%	0.08%
March	1,370,848	4,734	0.35%	2,306	377	2,683	56.68%	0.20%
April	1,373,672	4,616	0.34%	2,324	347	2,671	57.86%	0.19%
May	1,373,212	3,756	0.27%	1,943	228	2,171	57.80%	0.16%
June	1,372,199	3,834	0.28%	2,045	312	2,357	61.48%	0.17%
July	1,382,128	4,901	0.35%	2,622	385	3,007	61.35%	0.22%
August	1,393,544	4,590	0.33%	2,440	354	2,794	60.87%	0.20%
September	1,397,601	4,556	0.33%	2,353	373	2,726	59.83%	0.20%
October	1,406,749	4,689	0.33%	2,636	355	2,991	63.79%	0.21%
November	1,412,395	7,047	0.50%	4,276	617	4,893	69.43%	0.35%
December	1,413,334	7,147	0.51%	3,703	662	4,365	61.07%	0.31%
<b>YTD Total</b>	<b>1,413,334</b>	<b>54,727</b>	<b>3.87%</b>	<b>29,715</b>	<b>4,211</b>	<b>33,926</b>	<b>61.99%</b>	<b>2.40%</b>

<sup>1</sup> Includes customers verified as over income or who requested to be de-enrolled.

<sup>2</sup> Verification results are tied to the month initiated.

**CARE Table 3B**  
**Post-Enrollment Verification Results (High Usage)**

2014	Total CARE Households Enrolled	Households Requested to Verify	% of CARE Enrolled Requested to Verify	CARE Households De-Enrolled (Due to no response)	CARE Households De-Enrolled (Verified as Ineligible) <sup>1</sup>	Total Households De-Enrolled <sup>2</sup>	% De-enrolled through Post Enrollment Verification	% of Total CARE Households De-Enrolled
January	1,383,966	9,362	0.68%	8,228	495	8,723	93.17%	0.63%
February	1,378,604	6,773	0.49%	5,976	357	6,333	93.50%	0.46%
March	1,370,848	1,167	0.09%	1,019	65	1,084	92.89%	0.08%
April	1,373,672	1,310	0.10%	1,142	68	1,210	92.37%	0.09%
May	1,373,212	810	0.06%	699	29	728	89.88%	0.05%
June	1,372,199	816	0.06%	711	43	754	92.40%	0.05%
July	1,382,128	3,430	0.25%	3,016	132	3,148	91.78%	0.23%
August	1,393,544	5,111	0.37%	4,321	284	4,605	90.10%	0.33%
September	1,397,601	5,785	0.41%	5,123	255	5,378	92.96%	0.38%
October	1,406,749	5,696	0.40%	5,022	276	5,298	93.01%	0.38%
November	1,412,395	2,332	0.17%	2,074	119	2,193	94.04%	0.16%
December	1,413,334	780	0.06%	693	38	731	93.72%	0.05%
<b>YTD Total</b>	<b>1,413,334</b>	<b>43,372</b>	<b>3.07%</b>	<b>38,024</b>	<b>2,161</b>	<b>40,185</b>	<b>92.65%</b>	<b>2.84%</b>

<sup>1</sup> Includes customers verified as over income, who declined to participate in ESA, or who requested to be de-enrolled.

<sup>2</sup> Verification results are tied to the month initiated.



# Pacific Gas and Electric Company

## PY 2014 CARE Annual Report

### CARE Table 4

#### Self-Certification and Self-Recertification Applications

	Provided <sup>1</sup>	Received	Approved	Denied	Pending/ Never Completed	Duplicates
<b>Total</b>	13,698,698	661,792	590,276	26,774	44,742	93,085
<b>Percentage <sup>2</sup></b>		100.00%	89.19%	4.05%	6.76%	14.07%

<sup>1</sup> Includes number of applications provided via direct mail campaigns, call centers, bill inserts and other outreach methods. Because there are other means by which customers obtain applications which are not counted, this number is only an

<sup>2</sup> Percentage of Received. Duplicates are also counted as Approved, so the total will not add up to 100%.

# Pacific Gas and Electric Company

PY 2014 CARE Annual Report

CARE Table 5

## Enrollment by County

County	Estimated Eligible Households			Total Households Enrolled			Penetration Rate		
	Urban	Rural <sup>1</sup>	Total	Urban	Rural <sup>1</sup>	Total	Urban	Rural <sup>1</sup>	Total
ALAMEDA	148,671	4	148,675	125,703	6	125,709	85%	155%	85%
ALPINE	0	136	136	0	12	12	n/a	9%	9%
AMADOR	1	4,555	4,556	0	4,173	4,173	0%	92%	92%
BUTTE	26,492	12,152	38,644	23,893	12,358	36,251	90%	102%	94%
CALAVERAS	63	7,708	7,771	59	5,486	5,545	94%	71%	71%
COLUSA	11	3,003	3,014	9	3,238	3,247	84%	108%	108%
CONTRA COSTA	95,070	1	95,071	83,810	1	83,811	88%	133%	88%
EL DORADO	6,763	6,017	12,780	5,542	5,740	11,282	82%	95%	88%
FRESNO	141,508	246	141,754	144,248	166	144,414	102%	68%	102%
GLENN	0	4,571	4,572	1	4,650	4,651	271%	102%	102%
HUMBOLDT	0	23,137	23,137	0	18,217	18,217	0%	79%	79%
KERN	37,904	56,439	94,343	39,053	58,328	97,381	103%	103%	103%
KINGS	238	8,926	9,164	133	8,587	8,720	56%	96%	95%
LAKE	1	16,418	16,419	1	12,294	12,295	80%	75%	75%
LASSEN	0	155	155	0	180	180	n/a	116%	116%
MADERA	16,403	7,810	24,212	15,516	5,243	20,759	95%	67%	86%
MARIN	19,577	0	19,577	12,486	0	12,486	64%	n/a	64%
MARIPOSA	24	3,327	3,351	15	2,365	2,380	62%	71%	71%
MENDOCINO	22	16,375	16,396	7	10,343	10,350	32%	63%	63%
MERCED	18,236	19,097	37,333	19,186	19,848	39,034	105%	104%	105%
MONTEREY	38,568	5,105	43,673	34,945	5,576	40,521	91%	109%	93%
NAPA	12,523	1	12,524	10,930	0	10,930	87%	0%	87%
NEVADA	9	10,412	10,420	3	9,027	9,030	35%	87%	87%
PLACER	20,166	11,207	31,372	12,655	8,052	20,707	63%	72%	66%
PLUMAS	113	3,226	3,338	12	1,763	1,775	11%	55%	53%
SACRAMENTO	153,023	0	153,023	106,802	0	106,802	70%	n/a	70%
SAN BENITO	153	6,081	6,233	72	4,837	4,909	47%	80%	79%
SAN BERNARDINO	50	382	432	44	254	298	87%	67%	69%
SAN FRANCISCO	85,337	0	85,337	63,508	0	63,508	74%	n/a	74%
SAN JOAQUIN	78,256	10,247	88,504	78,463	8,825	87,288	100%	86%	99%
SAN LUIS OBISPO	10,790	17,654	28,444	5,808	13,808	19,616	54%	78%	69%
SAN MATEO	52,770	0	52,770	35,571	0	35,571	67%	n/a	67%
SANTA BARBARA	17,679	1,611	19,290	16,269	667	16,936	92%	41%	88%
SANTA CLARA	118,480	4,024	122,505	104,625	2,872	107,497	88%	71%	88%
SANTA CRUZ	24,875	9	24,884	20,203	1	20,204	81%	11%	81%
SHASTA	11,710	11,090	22,800	10,569	9,326	19,895	90%	84%	87%
SIERRA	3	193	196	1	144	145	31%	74%	74%
SISKIYOU	0	21	21	0	7	7	n/a	33%	33%
SOLANO	41,536	0	41,536	40,556	0	40,556	98%	n/a	98%
SONOMA	52,270	3,326	55,596	39,292	2,569	41,861	75%	77%	75%
STANISLAUS	35,983	29,030	65,013	26,678	24,311	50,989	74%	84%	78%
SUTTER	12,974	1	12,975	13,529	0	13,529	104%	0%	104%
TEHAMA	11	11,965	11,976	8	11,506	11,514	70%	96%	96%
TRINITY	0	464	464	0	297	297	n/a	64%	64%
TULARE	669	8,302	8,971	353	8,857	9,210	53%	107%	103%
TUOLUMNE	0	9,931	9,931	0	7,179	7,179	0%	72%	72%
YOLO	24,694	2	24,696	20,378	1	20,379	83%	63%	83%
YUBA	10,714	75	10,789	11,169	115	11,284	104%	154%	105%
<b>Total</b>	<b>1,314,342</b>	<b>334,432</b>	<b>1,648,774</b>	<b>1,122,105</b>	<b>291,229</b>	<b>1,413,334</b>	<b>85%</b>	<b>87%</b>	<b>86%</b>

<sup>1</sup> "Rural" includes ZIP Codes classified as such by the Goldsmith modification that was developed to identify small towns and rural areas within large metropolitan counties. ZIP Codes not defined as rural are classified as urban.

# Pacific Gas and Electric Company

## PY 2014 CARE Annual Report

### CARE Table 6

#### Recertification Results

2014	Total CARE Population	Participants Requested to Recertify <sup>1</sup>	% of Population Total	Participants Recertified <sup>2</sup>	Participants Dropped	Recertification Rate % (E/C)	% of Total Population Dropped (F/B)
January	1,383,966	35,603	2.57%	29,345	6,258	82.42%	0.45%
February	1,378,604	33,005	2.39%	27,178	5,827	82.35%	0.42%
March	1,370,848	37,743	2.75%	31,241	6,502	82.77%	0.47%
April	1,373,672	34,935	2.54%	29,610	5,325	84.76%	0.39%
May	1,373,212	30,443	2.22%	25,458	4,985	83.63%	0.36%
June	1,372,199	29,770	2.17%	25,155	4,615	84.50%	0.34%
July	1,382,128	35,595	2.58%	29,121	6,474	81.81%	0.47%
August	1,393,544	33,206	2.38%	28,701	4,505	86.43%	0.32%
September	1,397,601	35,204	2.52%	28,826	6,378	81.88%	0.46%
October	1,406,749	33,388	2.37%	28,070	5,318	84.07%	0.38%
November	1,412,395	32,480	2.30%	26,975	5,505	83.05%	0.39%
December	1,413,334	31,209	2.21%	25,695	5,514	82.33%	0.39%
<b>YTD Total</b>	<b>1,413,334</b>	<b>402,581</b>	<b>28.48%</b>	<b>335,375</b>	<b>67,206</b>	<b>83.31%</b>	<b>4.76%</b>

<sup>1</sup> Does not include participants who closed their accounts during the 90-day response period.

<sup>2</sup> Results are tied to the month initiated.

# Pacific Gas and Electric Company

PY 2014 CARE Annual Report

CARE Table 7

Capitation Contractors

Contractor Name	Contractor Type (Check one or more if applicable)				Enrollments		
	Private	CBO	WMDVBE	LIHEAP	Rural	Urban	Total
Advancing Vibrant Communities, Inc.		X			0	0	0
Amador-Tuolumne Community Action Agency		X			4	0	4
American Canyon Family Resource Center		X			0	0	0
Anderson Cottonwood Christian Assistance		X			5	6	11
Arc of San Francisco		X			0	0	0
Area 12 Agency on Aging		X			1	0	1
Area Agency on Aging Serving Napa and Solano		X			0	1	1
Arriba Juntos					0	0	0
Asian Community Center		X			0	5	5
Asian Community Mental Health Services		X			0	0	0
Asian Pacific American Community Center		X			0	0	0
Berkeley Housing Authority					0	7	7
Breathe California of the Bay Area					0	2	2
California Association of Area Agencies on Aging		X			11	219	230
California Human Development Corporation					0	5	5
Catholic Charities Diocese of Fresno		X			0	20	20
Center of Vision Enhancement					0	1	1
Central California Legal Services, Inc.					0	2	2
Central Coast Energy Services, Inc					3	76	79
Child Abuse Prevention Council of San Joaquin County		X			0	1	1
Chinese Christian Herald Crusades					0	5	5
Chinese Newcomers Service Center					0	11	11
Community Action Marin		X			1	27	28
Community Pantry of San Benito County		X			0	0	0
Community Resource Project, Inc.					0	89	89
Community Resources for Independent Living		X			0	1	1
CSU Chico Research Foundation - Passages					0	0	0
Delta Community Services, Inc.		X			0	2	2
Disability Resource Agency for Independent Living		X			3	0	3
Ebony Counseling Center					0	3	3
Filipino American Development Foundation		X			1	8	9
Fresno Center for New Americans		X			0	5	5
Golden Umbrella					1	3	4
Heritage Institute for Family Advocacy					0	30	30
Housing Authority of the City of Fresno					0	3	3
Housing Authority of the County of Kern					19	6	25
Independent Living Center of Kern County, Inc.					3	0	3
Independent Living Services of Northern California					0	0	0
KidsFirst					3	1	4
Kings Community Action Organization, Inc.		X			9	0	9
La Luz Bilingual Center					0	0	0
Lao Khmu Assoc., Inc					0	14	14
Marin Center for Independent Living					0	0	0
Merced County Community Action Agency		X			9	23	32
Merced Lao Family Community Inc.		X			0	7	7
Moncada Outreach					1	439	440
Monument Crisis Center		X			0	0	0
Mutual Assistance Network of Del Paso Heights					0	3	3
National Alliance on Mental Illness-Santa Clara County					0	0	0

# Pacific Gas and Electric Company

PY 2014 CARE Annual Report

CARE Table 7

Capitation Contractors

Contractor Name	Contractor Type (Check one or more if applicable)				Enrollments		
	Private	CBO	WMDVBE	LIHEAP	Rural	Urban	Total
Oakland Citizens Committee for Urban Renewal (OCCUR)		X			0	29	29
Opportunity Junction					0	0	0
Project Access, Inc					0	0	0
REDI (Renewable Energy Development Institute)					1	0	1
Ritter Center					0	2	2
Roseville Housing Authority					0	0	0
Sacred Heart Community Service					2	31	33
Salvation Army Golden State Divisional Headquarters					10	32	42
Second Harvest Food Bank of Santa Cruz and San Benito Counties					0	1	1
Self-Help for the Elderly					0	9	9
Shasta Women's Refuge					0	0	0
Silicon Valley Independent Living Center					0	0	0
St. Helena Family Center					0	5	5
Suscol Intertribal Council					0	0	0
Transitions Mental Health Association					0	0	0
United Way of Fresno County					0	0	0
Valley Oak Children's Services, Inc.					1	4	5
West Valley Community Services		X			0	0	0
Yolo County Housing Authority					0	6	6
Yolo Family Resource Center					0	5	5
<b>Total Enrollments</b>							<b>1,237</b>

# Pacific Gas and Electric Company

## PY 2014 CARE Annual Report

### CARE Table 8

#### Participants per Month

2014	Gas and Electric	Gas Only	Electric Only	Total	Eligible Households	Penetration Rate	% Change
January	823,171	228,691	332,104	1,383,966	1,648,774	84%	-0.2%
February	819,970	228,431	330,203	1,378,604	1,648,774	84%	-0.4%
March	815,345	227,060	328,443	1,370,848	1,648,774	83%	-0.6%
April	816,065	228,555	329,052	1,373,672	1,648,774	83%	0.2%
May	816,666	227,730	328,816	1,373,212	1,648,774	83%	0.0%
June	816,852	226,624	328,723	1,372,199	1,648,774	83%	-0.1%
July	824,503	226,872	330,753	1,382,128	1,648,774	84%	0.7%
August	831,827	227,630	334,087	1,393,544	1,648,774	85%	0.8%
September	834,923	227,548	335,130	1,397,601	1,648,774	85%	0.3%
October	839,922	229,512	337,315	1,406,749	1,648,774	85%	0.7%
November	842,766	230,684	338,945	1,412,395	1,648,774	86%	0.4%
December	843,657	231,130	338,547	1,413,334	1,648,774	86%	0.1%

# Pacific Gas and Electric Company

PY 2014 CARE Annual Report  
CARE Table 9  
Average Monthly Usage & Bill

Average Monthly Gas / Electric Usage			
Residential Non-CARE vs. CARE Customers			
Customer	Gas Therms	Gas Therms	Total
	Tier 1	Tier 2	
Non-CARE	22.9	7.5	30.4
CARE	22.3	5.7	27.9
Customer	Electric kWh	Electric kWh	Total
	Tier 1	Tier 2	
Non-CARE	304	215	519
CARE	351	193	544

Average Monthly Gas / Electric Bill		
Residential Non-CARE vs. CARE Customers <sup>1</sup>		
(Dollars per Customer)		
Customer	Gas	Electric
Non-CARE	\$39.93	\$100.06
CARE	\$30.20	\$56.28

<sup>1</sup> Excludes master-meter usage.



# Pacific Gas and Electric Company

PY 2014 CARE Annual Report  
CARE Table 10  
Surcharge & Revenue

Electric					
CARE Surcharge and Revenue Collected by Customer Class					
Customer Class	Average Monthly		CARE Surcharge as Percent of Bill	Total CARE Surcharge Revenue Collected	Percentage of CARE Surcharge Revenue Collected
	CARE Surcharge	Monthly Bill			
Residential <sup>1</sup>	\$ 5	\$ 101	4.72%	\$ 200,224,044	28.37%
Commercial	\$ 46	\$ 804	5.73%	\$ 295,539,563	41.88%
Agricultural	\$ 66	\$ 1,124	5.89%	\$ 68,722,401	9.74%
Large/Indust	\$ 9,209	\$ 99,254	9.28%	\$ 141,184,712	20.01%

Gas					
CARE Surcharge and Revenue Collected by Customer Class					
Customer Class	Average Monthly		CARE Surcharge as Percent of Bill	Total CARE Surcharge Revenue Collected	Percentage of CARE Surcharge Revenue Collected
	CARE Surcharge	Monthly Bill			
Residential <sup>1</sup>	\$ 1	\$ 40	1.76%	\$ 29,948,008	32.72%
Commercial	\$ 7	\$ 199	3.30%	\$ 17,416,268	19.03%
NG Vehicle	\$ 14	\$ 392	3.59%	\$ 661,470	0.72%
Industrial <sup>2</sup>	\$ 5,734	\$ 48,102	11.92%	\$ 43,506,690	47.53%

<sup>1</sup> Excludes CARE customers.

<sup>2</sup> Industrial includes both G-NT(D), G-NT(T), G-NT(BB), and GNGV4 and is net of volumes qualifying for G-COG.

# Pacific Gas and Electric Company

PY 2014 CARE Annual Report

CARE Table 11

Capitation Applications

Entity	Total Received	Approved	Denied	Pending/ Never Completed	Duplicates
Amador-Tuolumne Community Action Agency	5	4	0	0	1
American Canyon Family Resource Center	1	0	0	0	1
Anderson Cottonwood Christian Assistance	15	11	1	0	3
Arc of San Francisco	2	0	0	0	2
Area 12 Agency on Aging	7	1	2	0	4
Area Agency on Aging Serving Napa and Solano	1	1	0	0	0
Arriba Juntos	1	0	0	0	1
Asian Community Center	10	5	1	0	4
Asian Community Mental Health Services	1	0	0	0	1
Berkeley Housing Authority	8	7	0	0	1
Breathe California of the Bay Area	3	2	0	0	1
California Association of Area Agencies on Aging	2,386	230	407	0	1,749
California Human Development Corporation	14	5	5	0	4
Catholic Charities Diocese of Fresno	33	20	1	0	12
Center of Vision Enhancement	1	1	0	0	0
Central California Legal Services, Inc.	2	2	0	0	0
Central Coast Energy Services, Inc.	203	79	22	0	102
Child Abuse Prevention Council of San Joaquin County	2	1	0	0	1
Chinese Christian Herald Crusades	9	5	2	0	2
Chinese Newcomers Service Center	14	11	2	0	1
Community Action Marin	38	28	1	0	9
Community Pantry of San Benito County	2	0	0	0	2
Community Resource Project, Inc.	117	89	8	0	20
Community Resources for Independent Living	1	1	0	0	0
Delta Community Services, Inc.	2	2	0	0	0
Disability Resource Agency for Independent Living	3	3	0	0	0
Ebony Counseling Center	5	3	1	0	1
Filipino American Development Foundation	13	9	1	0	3
Fresno Center for New Americans	10	5	0	0	5
Golden Umbrella	5	4	0	0	1
Heritage Institute for Family Advocacy	69	30	10	0	29
Housing Authority of the City of Fresno	7	3	0	0	4
Housing Authority of the County of Kern	25	25	0	0	0
Independent Living Center of Kern County, Inc.	4	3	0	0	1
KidsFirst	6	4	0	0	2
Kings Community Action Organization, Inc.	12	9	1	0	2
La Luz Bilingual Center	1	0	0	0	1
Lao Khmu Assoc., Inc	21	14	1	0	6
Merced County Community Action Agency	42	32	2	0	8
Merced Lao Family Community Inc.	9	7	1	0	1
Moncada Outreach	498	440	32	0	26
Mutual Assistance Network of Del Paso Heights	3	3	0	0	0
Oakland Citizens Committee for Urban Renewal	39	29	1	0	9
REDI (Renewable Energy Development Institute)	1	1	0	0	0
Ritter Center	2	2	0	0	0
Sacred Heart Community Service	63	33	4	0	26
Salvation Army Golden State Divisional Headquarters	106	42	13	0	51
Second Harvest Food Bank of Santa Cruz and San Benito Counties	2	1	0	0	1
Self-Help for the Elderly	11	9	0	0	2
St. Helena Family Center	8	5	0	0	3
Suscol Intertribal Council	1	0	1	0	0
Transitions Mental Health Association	1	0	0	0	1
Valley Oak Children's Services, Inc.	10	5	0	0	5
Yolo County Housing Authority	13	6	2	0	5
Yolo Family Resource Center	9	5	1	0	3
<b>Totals</b>	<b>3,877</b>	<b>1,237</b>	<b>523</b>	<b>0</b>	<b>2,117</b>

# Pacific Gas and Electric Company

PY 2014 CARE Annual Report  
CARE Table 12  
Expansion Program

Participating Facilities by Month						
2014	Gas			Electric		
	CARE Residential Facilities	CARE Commercial Facilities	Total Gas	CARE Residential Facilities	CARE Commercial Facilities	Total Electric
January	3,912	591	4,503	4,572	916	5,488
February	3,913	594	4,507	4,574	1,070	5,644
March	3,922	593	4,515	4,611	1,074	5,685
April	3,920	594	4,514	4,627	1,063	5,690
May	3,959	599	4,558	4,744	1,068	5,812
June	3,967	604	4,571	4,766	1,073	5,839
July	3,985	605	4,590	4,778	1,073	5,851
August	3,998	606	4,604	4,799	1,074	5,873
September	3,995	607	4,602	4,797	1,074	5,871
October	3,997	609	4,606	4,800	1,075	5,875
November	3,998	609	4,607	4,808	1,074	5,882
December	3,998	610	4,608	4,818	1,077	5,895

Average Monthly Gas / Electric Usage <sup>1</sup>		
Customer	Gas	Electric
	Therms	KWh
Residential Facilities	36	607
Commercial Facilities	532	7,232

CARE Expansion Self-Certification and Self-Recertification Applications					
	Received	Approved	Denied	Pending/Never Completed	Duplicates
Total	356	309	9	32	6
Percentage	100.00%	86.80%	2.53%	8.99%	1.69%

<sup>1</sup> Excludes master meter usage.

# Pacific Gas Electric Company

PY 2014 CARE Annual Report

CARE Table 13

High Usage Verification Results

Stage 1 - IRS Documentation and ESA Agreement				Stage 2 - ESA Participation			Stage 3 - Usage Monitoring		
Households Requested to Verify	Removed (No Response)	Removed (Verified Ineligible) <sup>1</sup>	Income Verified and Referred to ESA	Failed and Removed <sup>2</sup>	Ineligible <sup>3</sup>	Completed <sup>4</sup>	Removed <sup>5</sup>	Appeals Denied	Appeals Approved
66,972	47,774	4,674	14,524	2,012	5,976	6,069	1,080	123	395

<sup>1</sup> Includes customers who were verified as over income, requested to be removed, or did not agree to participate in ESA.

<sup>2</sup> Includes customers who declined to participate in ESA, failed to respond to appointment requests, or missed multiple appointments.

<sup>3</sup> Includes customers who previously participated, did not meet the three-measure minimum, landlord refused, etc. These customers move directly to Stage 3.

<sup>4</sup> Does not include 467 customers still pending ESA Participation.

<sup>5</sup> Customers removed for exceeding 600% of baseline in any monthly billing cycle after the 90-day grace period following ESA Participation.

**Note:** Results as of March 31, 2015 (reflecting verification requests mailed in 2013 or 2014).

# Pacific Gas and Electric Company

## PY 2014 CARE Annual Report

### CARE Table 14

#### Categorical Enrollment

Type of Enrollment	Number of Customers Enrolled <sup>1</sup>
Food Stamps	16,898
Head Start - Tribal	765
Healthy Families	7,932
Indian Affairs General Assistance	172
LIHEAP	3,281
Medi-Cal (Over 65)	7,511
Medi-Cal (Under 65)	42,648
NSL - Free Lunch	11,358
SSI	11,477
TANF	4,714
WIC	17,647

<sup>1</sup> Number of customers enrolled reflects categorical programs selected by customer. Please note that in some cases customers select more than one

**Note:** PG&E only tracks Categorical Enrollment types for customers who enroll online (45%).