

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

Application of Southern California Edison Company (U 338E) for Approval of its Energy Savings Assistance and California Alternate Rates for Energy Programs and Budgets for Program Years 2015-2017.	Application 14-11-007 (Filed November 18, 2014)
Application of San Diego Gas & Electric Company (U 902 M) for Approval of Low-Income Assistance Programs and Budgets for Program Years 2015-2017.	Application 14-11-009 (Filed November 18, 2014)
Application of Pacific Gas and Electric Company for Approval of the 2015-2017 Energy Savings Assistance and California Alternate Rates for Energy Programs and Budget (U 39 M).	Application 14-11-010 (Filed November 18, 2014)
Application of Southern California Gas Company (U 904 G) for Approval of Low-Income Assistance Programs and Budgets for Program Years 2015-2017.	Application 14-11-011 (Filed November 18, 2014)

**ANNUAL REPORT ACTIVITY OF SOUTHERN CALIFORNIA GAS COMPANY
(U 904 G) ON LOW INCOME ASSISTANCE PROGRAMS FOR 2014**

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(U 904 G) ON LOW INCOME ASSISTANCE PROGRAMS FOR 2014**

This report presents the results and expenditures for Southern California Gas Company (SoCalGas') California Alternate Rates for Energy (CARE) program and Energy Savings Assistance Program (ESA) for program year 2014. The purpose of this report is to consolidate activity for the CARE and ESA Programs, and provide the Californai Public Utilities Commission's Energy Division with all the necessary information in analyzing the low-income programs.

Respectfully Submitted,

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

Annual Report

2014 Results

May 1, 2015

ENERGY SAVINGS ASSISTANCE PROGRAM & CARE ANNUAL REPORT

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ENERGY SAVINGS ASSISTANCE PROGRAM ANNUAL REPORT

1. ENERGY SAVINGS ASSISTANCE PROGRAM EXECUTIVE SUMMARY

The California Public Utilities Commission (CPUC) authorized the Southern California Gas Company (SoCalGas) Energy Savings Assistance Program ¹ (ESA Program) for program year 2014 (PY2014) in Decision (D.) 12-08-044, later updated through the issuance of Phase II D.14-08-030 on August 20, 2014. This report provides information on SoCalGas' ESA Program accomplishments and expenditures for PY2014, the third year of the program cycle (which commenced with program year 2012).² SoCalGas' ESA Program offers low-income customers weatherization services, energy efficient appliances, and energy education at no cost to qualified natural gas customers within its service territory.

In D.07-12-051, the CPUC updated its policy objectives for the ESA Program stating:

“[T]he key policy objective for the LIEE Programs, like that of our non-LIEE Energy Efficiency Programs, is to provide cost-effective energy savings that serve as an energy resource and to promote environmental benefits. Concurrently we retain our commitment to ensuring the LIEE Programs add to the participant's quality of life, which implicates, equity, energy affordability, bill savings and safety and comfort for those customers who participate in LIEE Programs.”³

To achieve these objectives, the CPUC adopted a programmatic ESA Program initiative (programmatic initiative) “to provide all eligible LIEE customers the opportunity to

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

² SoCalGas also notes that certain elements of this annual report have been altered from prior versions to reflect information associated with the 2012 – 2014 program cycle. Such matters were determined in consultation with the Commission's Energy Division and the other large energy Investor Owned Utilities (IOUs) as part of the charges of the mid-cycle working group established by D.12-08-044.

³ D.07-12-051 at p. 25.

participate in LIEE programs and to offer those who wish to participate all cost effective energy efficiency measures in their residences by 2020.”⁴

The California Energy Efficiency Strategic Plan (Strategic Plan) lays out two goals: 1) By 2020, all eligible customers will be given the opportunity to participate in the ESA Program, and 2) The ESA Program will be an energy resource by delivering increasingly cost-effective and longer-term savings.

In D.12-08-044, the CPUC reinforced its key policy objective of making the ESA Program a reliable energy resource by adopting goals to treat one third of SoCalGas’ willing and eligible households during program years 2012-2014. SoCalGas continues to work towards meeting the CPUC directed ESA Program goals and objectives. Summary results for PY2014 are provided in Section 1.2 below.

1.1. Alignment of Energy Savings Assistance Program with Strategic Plan Goals and Strategy

1.1.1. Please identify the IOU strategies employed in meeting Goal 1: Improve Customer Outreach

Implementation Plan and Timeline		
Strategies	Mid Term 2012 – 2014	IOU strategy employed this program year
1.1: Strengthen program outreach using segmentation analysis and social marketing tools.	<ul style="list-style-type: none"> Implement energy education designed to help customers understand and change behaviors in ways that support ESA Program savings. Identify, implement and evaluate effective marketing, education and outreach methods for targeting low-income customer segments. Use social marketing to 	<ul style="list-style-type: none"> The Whole Neighborhood Approach (WNA) continued from prior years to be used throughout Program Year (PY) 2014 to identify and reach out to targeted low-income customer segments. PY2014 included WNA canvassing lists delivered to ESA Program contractors as a means of targeting high probability customers in self certification PRIZM codes. This kind of information is of high value to ESA Program contractors and is used to streamline the ESA Program enrollment process. SoCalGas continued to use the ESA Program website page and interest form, which creates another avenue to

⁴ Id.

Implementation Plan and Timeline		
Strategies	Mid Term 2012 – 2014	IOU strategy employed this program year
	effectively engage low-income customers in program participation.	<p>generate customer driven leads and allows the customers to specify whether they qualify through income and/or categorical eligibility. The web page captures additional customer information in order to better identify potentially eligible customers and accelerate the enrollment process.</p> <ul style="list-style-type: none"> Marketing campaigns such as direct mailers, bill inserts, and automated voice messaging (AVM) were effective, as well as using information resources such as demographics and targeted zip codes for contacting various customer segments and educating them on the ESA Program. SoCalGas utilizes newly enrolled CARE customer, and CARE rate transfer customer lists to deploy email campaigns. Customers on these two monthly lists have a higher probability to be eligible for the ESA Program. <p>In PY2014, SoCalGas utilized social marketing:</p> <ul style="list-style-type: none"> Deployed a bilingual (English and Spanish) residential communications campaign from May 26th to August 17th to increase awareness and drive enrollment participation in Customer Assistance Programs. This campaign targeted income qualified customers within the service territory, with emphasis in Los Angeles counties. Tactical execution includes outdoor advertising via bus interiors/exterior and geo-targeted gas pump ads, print ads in various multicultural publications, and online/mobile banners on The LA Times, NBC LA, Time, La Opinion, Yahoo, CNN, and Facebook, among others.

Implementation Plan and Timeline		
Strategies	Mid Term 2012 – 2014	IOU strategy employed this program year
1.2: Develop a recognizable and trustworthy Brand/Tagline for the programs.	<ul style="list-style-type: none"> Launch integrated EE/ESA/DSM brand. 	<ul style="list-style-type: none"> All ESA Program marketing and advertising campaigns (collateral, give-aways, direct mail, email, etc.) include the ESA Program brand. The ESA Program provided t-shirts with the ESA Program brand. The ESA Program logo is on other joint Investor Own Utilities (IOU) material (e.g., the Energy Education Guide).
1.3: Improve program delivery.	<ul style="list-style-type: none"> Use information from segmentation analysis to achieve efficiencies in program delivery. Leverage with Local, State, and Federal agencies as well as other organizations to increase seamless coordination, efficiency and enrollment. 	<ul style="list-style-type: none"> SoCalGas continues to use PRIZM codes⁵ and delivers this information in Zip-7 lists (5 digit zip code plus the first two digits of the four digit extension) through its WNA efforts, which allows ESA Program contractors to reach geographically concentrated eligible customer segments. SoCalGas Public Affairs representatives used their contacts to help promote the ESA Program to local, state, and federal agencies. Community Based Organizations (CBOs) working with SoCalGas continue to utilize their intake processes to promote the ESA Program along with the other services they provide. SoCalGas maintained its water measure leveraging agreements with five water utilities. ESA Program water/gas conservation coordination includes sharing customer data and measure co-funding. SoCalGas has agreements with Park Water Company, San Gabriel Valley

⁵ PRIZM codes are a set of area-based customer segmentation data widely used for marketing purposes in the United States. The data consists of demographic clusters that categorize every U.S. household into a segment. These segments were developed in part from the analysis of U.S. census data, and categorize U.S. consumers into 14 distinct groups and 66 segments. The segments help marketers tailor content to consumers' needs and consider a variety of factors, including income, preferences, lifestyles and purchasing behaviors.

Implementation Plan and Timeline		
Strategies	Mid Term 2012 – 2014	IOU strategy employed this program year
		<p>Water Company, Fontana Water Company, Irvine Ranch Water District,⁶ and Eastern Municipal Water District.</p> <ul style="list-style-type: none"> • To help contractors improve program delivery, SoCalGas continued to provide Enrollment and Assessment Workshops. • Leveraging with local government partnerships to help build program credibility to gain customer's trust. <p>SocalGas, in compliance with D.12-08-044 and in coordination with the other IOUs, developed a standardized statewide property waiver form for property owners wishing to participate in the ESA Program. The joint IOU Property Owner Authorization form (POA) was implemented in PY2014. With the joint IOU POA, contractors providing services to customers of more than one IOU only need to obtain one signature from the property owner, eliminating excess documentation and minimizing enrollment time.</p>
1.4: Promote the growth of a trained Energy Savings Assistance Program workforce.	<p>Implement ESA workforce education and training.</p> <ul style="list-style-type: none"> • Coordinate resources for training related to ESA program needs to ensure delivery of ESA-trained resources to the program. 	<ul style="list-style-type: none"> • SoCalGas enhanced ESA Program workforce education and training by making improvements continuously to the delivery of its enrollment and assessment classes, In-Home Energy Education, and its customer enrollment forms. • In-Home energy education enhancements included the development of the Energy Education Wheel and the Energy Education coloring and activity book, which will be implemented and distributed to customers in PY2015. The Energy Education Wheel provides average therm usage, cost estimates and tips for conserving energy in the home.

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

Implementation Plan and Timeline		
Strategies	Mid Term 2012 – 2014	IOU strategy employed this program year
		<ul style="list-style-type: none"> • SoCalGas also updated energy education material in their contractor curriculum incorporating cold water savings tips and conservation practices. These were developed to provide extensive energy education for each customer. • SoCalGas provided forms training for Enrollment and Assessment contractors when the new forms were implemented. This included 6 trainings held at the SoCalGas Energy Resource Center (ERC) facility and an additional 3 trainings held at various contractor offices. • To help the ESA Program maintain uniformity between providers with common service territory, SoCalGas aligned many of its program practices with Southern California Edison Company (SCE). Some of these practices included aligning fees, acceptable eligibility documentation, and energy education to streamline the enrollment process and decrease duplicative documentation.

**1.1.2. Please identify the IOU strategies employed in meeting Goal 2:
Energy Savings Assistance Program is an Energy Resource**

Implementation Plan and Timeline		
Strategies	Mid Term 2012 – 2014	IOU strategy employed this program year
<p>2.1: Increase collaboration and leveraging of other low-income programs and services.</p>	<ul style="list-style-type: none"> Continue to expand partnerships with stakeholders and seek new opportunities for data sharing. 	<ul style="list-style-type: none"> The ESA Program uses data sharing with the CARE Program to target customers for ESA Program enrollment. Additionally, the ESA Program will enroll customers in the CARE Program when they have participated in the ESA Program and are not on CARE. SoCalGas, working with South Coast Air Quality Management District (SCAQMD), is promoting ESA Program weatherization in Boyle Heights and the city of San Bernardino to assist with the goal to eliminate indoor pollution through infiltration measures. SoCalGas' ESA and CARE Programs have established a working relationship with the Asian Resource Center, a CBO and member agency under the Community Help and Awareness with Natural Gas and Electricity Services (CHANGES) Pilot Program, by attending their events and promoting low-income utility programs in-language. The ESA Program will continue to work with its contractors, especially contractors that are CBOs, to sponsor contractor community events. See section 1.3 above on additional leveraging with water utilities.

Implementation Plan and Timeline		
Strategies	Mid Term 2012 – 2014	IOU strategy employed this program year
<p>2.2: Coordinate and communicate between Energy Savings Assistance Program, energy efficiency and DSM programs to achieve service offerings that are seamless for the customer.</p>	<ul style="list-style-type: none"> Continually reevaluate and update programs to take advantage of new technologies. Explore in-home displays; home area networks and/or “pay-as-you-go” technology to assist low income customers manage their energy use. 	<ul style="list-style-type: none"> The ESA Program continues to work with Energy Efficiency (EE) Programs, including an Integrated Demand Side Management (IDSM) Single Point of Contact to reach and educate large housing portfolio owners and managers of low-income and general energy efficiency programs. The ESA Program participated in the California Services Department (CSD) pilot to jointly offer no-cost Solar Water Heater (SWH) installations to low-income single family residences. As part of this pilot, the ESA Program coordinated externally with CSD, Energy Division, and other IOUs, as well as internally with SWH Programs and SoCalGas’ Communications staff leads. The pilot was completed in PY2014, and CSD plans to submit a report on the results of the pilot by mid-2015 SoCalGas has leveraged sponsorships of community events between the Customer Assistance and Advanced Meter Initiative (AMI) departments, and has taken opportunities to present ESA Program and CARE information at appropriate AMI community outreach events. SoCalGas participated in Community Forums with other utilities where AMI, ESA Program, and CARE material was presented to educate attendees on these programs.

Implementation Plan and Timeline		
Strategies	Mid Term 2012 – 2014	IOU strategy employed this program year
2.3: Provide low-income customers with measures that result in the most savings in the Energy Savings Assistance Program.	<ul style="list-style-type: none"> Assess opportunities to incorporate new energy efficiency measures into the ESA program, e.g., plug-load reduction, new HVAC technology. 	<ul style="list-style-type: none"> SoCalGas continued to provide all feasible measures to customers' homes, such as attic insulation, furnace pilot retrofit kits, and high efficiency (HE) clothes washers, which lead to long-term energy savings. Also, by completing minor home repairs, such as to the door and building envelope, SoCalGas assisted customers by increasing the health, comfort and safety of their dwellings, and reducing outside air infiltration. The SoCalGas 2015 – 2017 Low Income Programs Application includes a proposal for a new Tub Spout measure that SoCalGas wishes to introduce into the portfolio in 2015 through an Advice Letter process. The measure is projected to provide energy savings and support water conservation.
2.4: Increase delivery of efficiency programs by identifying segmented concentrations of customers.	<ul style="list-style-type: none"> Evaluate approach determine whether additional segments are needed. 	<ul style="list-style-type: none"> See Section 1.3 above regarding the use of PRIZM codes to reach geographically concentrated eligible customer segments.

1.2. Energy Assistance Savings Program Overview

The SoCalGas ESA Program serves all eligible low-income customers, willing to participate in the program, by providing all feasible ESA Program measures⁷ as determined through outreach and assessment and the installation process. In PY2014, as SoCalGas continued to make progress toward achieving the goal of providing service to every willing and eligible customer by 2020, the ESA Program treated a total of

⁷ See D. 08-11-031, at Ordering Paragraph (OP) 15.

92,967 homes,⁸ which was 68% of the annual homes treated goal of 136,836 adopted in D.12-08-44 issued on August 30, 2012. Also in PY2014, 93,812 homes were weatherized.⁹

As part of its comprehensive services to eligible ESA Program participants, SoCalGas provided: in-home energy education to 88,674 customers, 73,397 homes received envelope and air sealing measures, 5,658 attic insulation improvements, 91,122 Domestic Hot Water measures, 26,670 furnace clean and tune measures, 137 forced air unit standing pilot change outs, and 2,468 duct seal weatherization measures. In addition, SoCalGas provided and/or serviced 36,397 appliances including 1,148 water heater repair and replacements, 9,213 furnaces, and 26,036 high efficiency clothes washers. A total of 10,029 customers were classified as “ineligible” or “unwilling”¹⁰ to participate in PY2014 which represents approximately 11% of the number of homes treated in PY2014.

The average per home lifecycle bill savings for the PY2014 ESA Program was \$147. Weatherization and measure installations resulted in energy savings of 3,144,894 therms. The energy savings achieved through the 2014 ESA Program will contribute to the CPUC’s energy savings goals for program year 2006 and beyond as set forth in D.04-09-060. Furthermore, SoCalGas’ ESA Program contributes to the CPUC’s programmatic initiative.

⁸ Per D.02-12-019, the CPUC defines a “treated” home as an income-qualified home that has received any measure or service under the ESA Program, including energy education, compact fluorescent lamps, weatherization and appliances. Under the ESA Program, a treated home must receive all feasible measures for which it qualifies.

⁹ Per D.02-12-019, the CPUC defines a “weatherized” home as a subset of treated homes, and are defined as income-qualified homes that have received any weatherized measures (e.g., weather-stripping and caulking) under the ESA Program.

¹⁰ Ineligible & Unwilling is defined as leads that do not result in a customer enrollment based on one of the following reasons: customer refused; home does not meet minimum measure requirement; customer is moving; over income; owner refused for renter occupied single family; unable to provide homeownership documentation; or home weatherized under another program.

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

ESA Program expenditures and therm savings for 2014 are reflected in the following summary table.

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

Program Summary			
	Authorized / Planning Assumptions*	Actual	%
Budget**	\$132,417,191	\$93,781,355	71%
Homes Treated	136,836	92,967	68%
Therms Saved	2,426,915***	3,144,894	130%

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

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

*** Value shown represents the estimated energy savings for Program Year 2014 associated with the requested funding in Application (A.) 11-05-018. Funding was increased pursuant to D.11-08-044, which did not contain an associated upward energy savings estimate.

SoCalGas saw a decline in the number of homes treated in PY2014, reaching 92,967 homes compared to 106,948 the previous year. Despite falling short of the authorized goal of 136,836 homes, SoCalGas managed to achieve approximately 130% of its projected annual therm savings. Over 80% of PY2014 annual therm savings were the result of thermostatic shower valves, high efficiency clothes washers, and enclosure measure installations.

SoCalGas continues to prioritize providing a positive customer experience as a core objective for the ESA Program. To help evaluate and manage customer

satisfaction and program delivery, SoCalGas surveys customers and develops quarterly reports regarding the ESA Program as a whole, as well as to specific ESA Program contractors servicing customers. Customized evaluations are used to help ESA Program contractors understand customer viewpoints and to develop insight on ways to enhance and improve service delivery.

This focus on customer satisfaction has yielded year-over-year improvements from PY2012 to PY2014. Specifically, in PY2014, 58% of customers rated their overall quality of service as “excellent,” representing an improvement over the 55% achieved in PY2013 and 49% in PY 2012.¹¹ In addition, 61% rated their sign-up experience as “excellent,” 57% rated their installation experience as “excellent,” and 56% rated the inspection process as “excellent.” SoCalGas maintains its commitment to work closely with its contractor network to drive program improvement and to pursue improvements to these customer service results.

1.3. Whole Neighborhood Approach Evaluation

1.3.1. Provide a summary of the geographic segmentation strategy employed, (i.e. tools and analysis used to segment “neighborhoods,” how neighborhoods are segmented and how this information is communicated to the contractor/CBO).

SoCalGas continued to use of Zip-7 codes (the five-digit postal zip code plus the first two digits of the four-digit zip code extension) methodology to target neighborhood enrollments in PY2014. This methodology provides a greater level of detail on a neighborhood than traditional five-digit zip codes. SoCalGas uses

¹¹ SoCalGas’ PY2013 customer satisfaction rating of 55% at “excellent” represents an improvement over PY2012 when 49% of customers responded that service level was “excellent.” In PY2013, SoCalGas changed the customer satisfaction rating system to a 5-point descriptive scale for its survey (Excellent, Very Good, Good, Fair, Poor) and the performance goal set at the top rating (“excellent”). This replaced the PY2012 system which used a 10-point numeric rating scale and performance goals set at the top two ratings (“excellent” or “very good”). For PY2012, the ESA Program overall satisfaction scored 73%, as reported in the PY2012 Annual Report.

200% of the federal poverty level (FPL) as a factor to calculate the “estimated eligible” population in each Zip-7 area. SoCalGas extracted Zip-7 codes, identified smaller areas to target, and then used this data to create more refined canvass lists for contractors. Zip-7 codes also represent the highest level of detail included in the demographic information provided to SoCalGas by Athens Research.¹²

In addition, SoCalGas continued to provide contractors with canvass lists utilizing PRIZM codes (as noted above, a data source that allows contractors to better determine the likelihood of a particular household’s potential eligibility for participation in the ESA Program based on market characteristics). A set of instructions was included with every canvass list provided to contractors. Contractors also received regular information updates at the ESA Program contractor meetings.

In PY2014, the Whole Neighborhood Approach methodology used a geographic segmentation strategy that compared customer account numbers contained in Zip-7 and other canvass lists against SoCalGas’ Home Energy Assistance Tracking (HEAT) System, a database used for program tracking and reporting. This process determined if a particular household had previously been served by the ESA Program; households not yet served appear on canvass lists. Other useful information, such as a customers’ CARE status, also appeared for the contractors’ information.

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

1.3.2. Distinguish between customers treated as “go backs” and brand new customers so that the CPUC has a clear idea of how many new customers the IOUs are adding to the Energy Savings Assistance Program.

SoCalGas continues its focus on offering the ESA Program to dwellings that have not been served by the program in previous years. SoCalGas enrolled a total of 92,967 customers in PY2014, with 6,283 (7%) of the homes treated considered “go backs.”¹³

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

SoCalGas continues to revise its strategy for targeting customers based on energy usage, energy burden¹⁴, and energy insecurity¹⁵. One methodology that SoCalGas continued to employ in PY2014 was the Whole Neighborhood Approach. In PY2014, SoCalGas conducted Whole Neighborhood Approach efforts, reaching high energy burden customers without neglecting low income customers with other energy needs. SoCalGas also conducted WNA efforts to target low income areas using PRIZM code demographic information on households, which can be analyzed according to geographic social groups¹⁶ and sorted on a scale from highest incomes to lowest incomes. The PRIZM code tool allows SoCalGas to analyze energy burden, assuming that the lowest incomes have the highest energy burden.

¹³ Under the Statewide Low-Income Energy Efficiency 2013 Policy and Procedures Manual (P&P Manual), certain restrictions apply to homes that have been previously treated under the Energy Savings Assistance Program. Under Section 2.7 of the P&P Manual, the IOUs are allowed to go back and treat any dwelling served prior to 2002, but they will first seek out new dwellings that have yet to be treated.

¹⁴ Energy burden is the ratio of customer energy bills to income.

¹⁵ Energy insecurity is related to late payments, and/or threatened service shut-off.

¹⁶ Urban, Suburban, Second City, Town and County.

By using the WNA to perform outreach to eligible customers with varying energy needs, along with using PRIZM code tools to analyze results, the ESA Program was able to use remaining program resources to focus on other high priority segments through general marketing activities. A key high priority segment was customers with disabilities. As previously stated, the purpose of employing this strategy was to promote the ESA Program to a greater number of customers and special segments.

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

SoCalGas began its WNA effort in PY2009 and made adjustments that year to refine processes. In each of the subsequent years and again in PY2014, SoCalGas maintained program delivery strategies related to Identification, Outreach, Enrollment, Assessment, Measure Installation, and Inspections.

The WNA methodology in PY2014 targeted just under 900,000 customers and ultimately enrolled 10,225 eligible customers. The Zip-7 methodology coupled with PRIZM codes appears to be a worthwhile strategy for identifying smaller, more manageable canvassing lists that contain households more likely to meet ESA Program eligibility requirements. WNA efforts are also a good way to help new ESA Program contractors get established and achieve success in their endeavors. SoCalGas continued its process that captures WNA efforts and documents which customers it has attempted to contact via this methodology. Beginning in PY2010 and continuing throughout PY2014, WNA campaign information and data tracking is uploaded using the HEAT System. Reports are prepared using data from the HEAT System to determine the results of each WNA effort. These reports provide an exhaustive list of customers that were included in each WNA effort.

Beyond the WNA efforts, SoCalGas has expanded outreach to deliver ESA Program information to customers using AVM campaigns. This methodology helps to streamline the enrollment process by putting customers in direct contact with an ESA Program contractor in their area and thus eliminating the step requiring SoCalGas to act as an intermediary by assigning a contractor.

1.4. Energy Savings Assistance Program Customer Enrollment Evaluation

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

In PY2014, SoCalGas continued to use categorical eligibility¹⁷ and self certification¹⁸ as tools to streamline customer enrollments to the ESA Program. Categorical eligibility and self certification streamline program enrollment because they decrease required income documentation. With categorical eligibility, customers who can provide documents proving participation in one of several state or federal programs do not need to provide additional income documentation in order to qualify for enrollment in the ESA Program and CARE.

Categorical Eligibility:

SoCalGas' Public Affairs Department and Media Relations Departments continued to inform the public at-large on the ESA Program and its enrollment requirements. Media Relations issues an annual press release on updated income guidelines and accepted categorical programs. SoCalGas continues to

¹⁷ Categorical programs include: Medicaid/Medi-Cal, Women, Infants, and Children Program (WIC), and LIHEAP, SNAP, Tribal Temporary Assistance to Needy Families (TANF), Bureau of Indian Affairs General Assistance (BIA GA), National School Lunch Program (NSLP), Tribal Head Start, State Supplemental Security Income (SSI), and Healthy Families A & B.

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

provide lists of categorical programs on its company website [found at www.SoCalGas.com] and in its ESA Program brochures, which are printed in multiple languages.

Self-certification:

SoCalGas conducted outreach and assessment refresher classes to help increase awareness of all customer and home eligibility requirements for the ESA Program. These courses addressed topics related to the various avenues to income qualify households such as self-certification, categorical eligibility, CARE Post Enrollment Verification (PEV), or full documentation. The classes also addressed eligibility, such as minimum measure/therm requirements, and other measure leveraging opportunities within low income programs.

SoCalGas enrolled 10,225¹⁹ customers through the WNA in PY2014. The WNA generated canvassing lead lists that are provided to ESA Program outreach contractors include the Zip-7 codes and the CARE PEV status. Zip-7 codes and CARE status helped streamline customer enrollments by highlighting households that meet the self-certification criteria adopted in D. 05-10-044. In addition to WNA lead lists, contractors also used PRIZM codes to streamline their enrollment process through non-WNA efforts.

Ethnic- focused Outreach including use of Ethnic-owned Media Channels:

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

¹⁹ This number is based on contractor inputs of enrollment “lead source” into the HEAT system. The WNA total treated number is based on a HEAT query that identifies all customers provided on WNA canvass lists that enrolled in PY2014.

PY2014, SoCalGas spent approximately \$386,000 on ethnic media, with approximately \$177,000 of that paid ethnic media going to ethnic-owned media.

Along with paid mass media and ethnic media advertising, SoCalGas participated in certain community events that drew the attendance of low-income customers and celebrated diversity in the community. In PY2014, SoCalGas participated in over 130 community events, some at no-cost to SoCalGas, that provided program awareness about the CARE and ESA Programs.

SoCalGas continued to build partnerships with organizations that help serve low-income customers in ethnically and culturally diverse communities. Such partnerships included Breathe LA, Imprenta Communications Group, 211, LA Campesina radio station, Cento Latino for Literacy, and other non-profit organizations that understand local ethnic communities. By utilizing their connections to understand local ethnic communities, these partnerships assisted SoCalGas in promoting the CARE and ESA Programs.

For example, in PY2014, Imprenta Communications assisted SoCalGas at the grassroots level by targeting underserved Hispanic and Asian communities by working on a plan to integrate all outreach in Boyle Heights and adjacent communities. Sponsored events were promoted through bilingual postcards (English/Spanish), and canvassers and personnel at the events explained the CARE and ESA Programs, and then helped customers fill out the necessary enrollment documents. Furthermore, at certain events, Imprenta Communications was able to facilitate media support for the SoCalGas Customer Assistance Programs, which were later featured in ads in several major Vietnamese local newspapers such as Viet Bao, Vien Dong Daily, and Nguoi Viet Daily News. In Orange County, SoCalGas sponsored several events at the Delhi Center, and these events targeted monolingual Spanish speaking customers in the neighborhood. Spanish-language speakers were on hand to discuss CARE

and ESA Programs. Customers were encouraged to bring their bills to these events, and those who were interested and eligible were enrolled on-site.

Other valuable media that Imprenta Communications provided included program promotion and awareness for SoCalGas on online newspaper websites that are popular among Asian customers. SoCalGas used ethnic-owned media whenever possible to promote and market the ESA Program. The discussion above highlights examples of paid ethnic media advertising deployed in PY2014.

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

SoCalGas treated 92,967 homes in PY2014, equivalent to 68% of the annual goal. When comparing this experience to the average cumulative treated home rate for the 2012-2014 program cycle of just over 72% of the authorized goal, PY2014 results are demonstrative of the challenge facing the ESA Program in reaching the remaining willing and eligible customer population.

The outreach and enrollment of new customers has been identified as the main constraint preventing higher levels of production, as opposed to any lack of capacity to install weatherization measures. In an effort to provide additional sources of enrolled customers to its network of contractors, in PY2014 SoCalGas deployed Customer Assistance Representatives (CARs).²⁰ CARs are SoCalGas employees that perform customer enrollment work for the Energy Savings Assistance Program that target hard-to-reach, rural, and underserved customers.

²⁰ As authorized in D.12-08-044, CARs are SoCalGas employees formerly working as meter readers, displaced by the Advanced Meter Initiative, in outreach specialist and dispatch roles, alongside SoCalGas' existing network of enrollment contractors.

This group is able to address customer trust issues through the identification of a SoCalGas employee and aims to gain a deeper understanding of customer issues.

In PY2014, CARs began acquiring firsthand experience outreaching to and enrolling customers in the ESA Program, with a focus on targeting customers in the hardest to reach areas. Although CARs outreach activity is still in the early stages, SoCalGas expects enrollments generated by this approach to increase as the representatives acquire additional resources and gain more experience interacting with customers in areas of high unwilling populations. However, the CARs' experience thus far supports the view that among eligible non-participants, willingness is lower than previously. This experience supports the findings of the Low Income Needs Assessment Study ("LINA Study") that willingness to participate in the program among non-participants may be as low as 52%.²¹ This unwillingness level provides insight as to the number of households enrolling in the program, despite employing tactics that had previously been effective in increasing enrollments, including marketing campaigns and rewarding the most productive contractors with greater contract allocations.

SoCalGas aims to approach the challenges of enrolling households by focusing on enhancing its outreach capacity, adopting recommendations of studies, and exploring new tactics in managing contractors and program delivery. SoCalGas has also proposed a number of program enhancements and approaches in its pending 2015 – 2017 Low Income Programs Application (docket number A.14-11-011) that are anticipated to have a positive impact on enrollment.

²¹ Low Income Needs Assessment for the Energy Savings Assistance and California Alternate Rates for Energy Programs ("LINA Study"), Final Report dated December 16, 2013. See Volume I: Summary Report, front matter pg. vi.

1.5. Disability Enrollment Efforts

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

During PY2014, SoCalGas targeted enrollment in the ESA Program of low income Medical Baseline²² and customers with disabilities²³ through a variety of approaches, such as through bill inserts and outreach at special events.

- SoCalGas continued its partnership with the Deaf and Disabled Telecommunications Program (DDTP)²⁴ to cross-promote the CARE / ESA Program in their Southern California Telephone Access Program (CTAP) locations in Burbank, Riverside and Santa Ana. Additionally, the DDTP link is displayed on SoCalGas' website page. To reciprocate, DDTP is displaying SoCalGas' website link Socalgas.com/assistance.
- In PY2014, SoCalGas updated its ESA Program bill insert with DDTP information for customers that use a Telecommunications Device for the Deaf (TDD or TTY technologies) to contact SoCalGas. The bill insert focus on the benefits of no-cost energy efficiency home improvements. SoCalGas plans in the following year to mail ESA Program bill insert with DDTP information to CARE and Medical Baseline participants.
- SoCalGas attended the Abilities Expo event at the Los Angeles Convention Center on March 6 – 8, 2014. The event drew about 10,000 people throughout the three day period. SoCalGas educated over 250 disabled customers on CARE, ESA Program, and Medical Baseline. Many customers with children who received Medi-Cal were pleased to learn that their households qualify for CARE and the ESA Program.

²² The Medical Baseline provides additional gas at a lower rate for medically-qualified customers.

²³ SoCalGas customer service records on disability and age are captured in CIS. Customers self-identified as having a disability.

²⁴ This program is administered by the CPUC and provides assistive telephone devices and the California Relay Service (CRS).

- SoCalGas supported the Asian and Pacific Islanders with Disabilities of California Gala on October 25th. The event was attended by 370 guests with interest in improving the lives of Asian Americans with mental, physical and development disabilities. SoCalGas educated guests on CARE, the ESA Program, Medical Baseline, and included brochures in the Gala's give-away bag.
- SoCalGas is working on building relationships with non-profit organizations that provide services to the disabled in an effort to promote the ESA Program to customers with disabilities. These include non-profit organizations like Pediatric Therapy Network in Torrance.

1.5.2. Describe how the Energy Savings Assistance Program customer segmentation for ME&O and program delivery takes into account the needs of persons with disabilities.

Brochures with information about the ESA Program were sensitive to the vision-impaired community. SoCalGas made Braille booklets available to customers in both English and Spanish to promote its Customer Assistance Programs. These booklets are available to customers during community events.

To respond to needs of customers with disabilities, SoCalGas continues to improve its website to increase accessibility and the online experience. The SoCalGas website (www.socalgas.com) is working to comply with Web Content Accessibility Guidelines 2.0 AA criteria. This means that vision impaired customers who use screen readers and similar assistive technologies can navigate the site and read its content. SoCalGas' My Account online bill pay system has already received the AA Seal of Approval from the Center for Accessible Technology for achieving AA accessibility standards. The My Account section of the website contains informational and explanatory videos on SoCalGas' Customer Assistance Programs.

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

Disability Enrollments			
Source	Total Enrollments	Disability Enrollments	% of Disability Enrollments
Other	65	7	11%
Capitation	434	61	14%
CARE Referral	690	75	11%
CARs Referral	650	128	20%
Contractor - Outreach	2	0	0%
Direct Mail	1,941	369	19%
Energy Efficiency Referral	1,495	254	17%
Gas Bill Insert	663	150	23%
HEAT Canvassing List	2,757	404	15%
InfoLine 211	34	7	21%
Joint Utility_Datasharing	15	5	33%
Joint Utility_ESAP SCE	30	4	13%
LIHEAP	174	32	18%
Media/Leveraging Dept./Event	242	54	22%
Muni	40	5	13%
Neighbor/Friend/Relative Referral	3,249	670	21%
Newspaper/Radio/Television	88	13	15%
Other Utility or Municipality Referral	3047	578	19%
Outreacher - Canvassing	60,633	7,693	13%
SCG - GAF/Medical Baseline	63	7	11%
SCG - Internet	769	138	18%
SCG Referral	1,643	358	22%
SoCalGas Email	306	40	13%
Telemarketing - Telephone	3,579	572	16%
Univision - Telethon	72	13	18%
Whole Neighborhood Approach	10,225	1,902	19%
WNA Census Self Cert	61	16	26%
Total	92,967	13,555	15%
Target Enrollment Rate			15%

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

SoCalGas continues to deploy strategies to implement in PY2014 to engage additional customers with disabilities to self-identify and meet a 15%

penetration goal for the disabled community. SoCalGas approached the 15% disabled enrollment goal through the following efforts below:

- In PY2014, SoCalGas made efforts to increase disabled customer enrollments by working closely and coordinating with media staff when participating in events for persons with disabilities. SoCalGas engaged in the promotion of the ESA Program by contracting with local media publications, radio, print, and online sites to inform customers about SoCalGas Customer Assistance Program services.
- In PY2014, SoCalGas launched CARs using SoCalGas employees, with outreach efforts to engage customers participation in the ESA Program. Of the 650 enrollments through CARs, 20% were for customers with disabilities.
- In PY2014, SoCalGas launched the Joint Utility Datasharing Tool to identify eligible customers who are enrolled in the ESA Program with other utilities with overlapping service territories. SoCalGas anticipates disabled customer enrollment through this method to increase in the future years.
- SoCalGas will continue to target customers participating in the Medical Baseline program through marketing campaigns, such as direct mail, AVM campaigns, and co-sponsorship of events for customers with disabilities.

1.6. Leveraging Success Evaluation, Including LIHEAP

1.6.1. Describe the efforts taken to reach out and coordinate the Energy Savings Assistance Program with other related low income program offered outside the IOU that serve low income customers.

In PY2013, SoCalGas implemented an agreement (Please see ESA Table 14) with Riverside Public Utilities (RPU) that continued throughout PY2014. The agreement allowed customers residing in the two utilities' overlapping service territories to benefit from both the SoCalGas and RPU low income program offerings during the same visit. Similar to previous agreements between SoCalGas and municipal utilities, the partnership with RPU covers installing a

comprehensive mix of measures offered in the ESA Program and additional RPU electric measures to eligible customers. This approach provides an increased benefit in that customers are able to realize the energy and bill savings inherent in both sets of measures. Furthermore, the collaborative effort put forth to deliver the benefits of multiple programs during one visit provides a more time sensitive solution to customers' needs.

SoCalGas and Park Water Company signed an agreement in PY2013 that continued in PY2014 to leverage water rebates for High Efficiency Clothes Washers (HECWs) installed within the two utilities' joint service territories. Park Water Company serves the Compton/Willowbrook, Lynwood, and Bellflower/Norwalk water systems. As a result of this agreement, SoCalGas collected over \$47,600 in Park Water Company rebates to offset ESA Program funding.

SoCalGas also leveraged with Eastern Municipal Water District (EMWD). Cities in the EMWD service territory include Hemet, Menifee, Moreno Valley, Murrieta, Perris, San Jacinto, and Temecula. Leveraging allowed SoCalGas to collect rebates for HECWs installed at joint customer homes under the ESA Program. EMWD and SoCalGas' leveraging dates back to PY2010. For the HECWs installed under this agreement in PY2014, the ESA Program collected over \$164,803 to the program. SoCalGas is working closely with EMWD to identify other ways to leverage.

In addition, SoCalGas signed contracts with Fontana Water Company, Irvine Ranch Water District and San Gabriel Valley Water Company to co-fund HECWs. During PY2014, the ESA Program collected approximately \$170,00 combined to offset ESA Program costs.

Between the five water utility leveraging agreements, SoCalGas' ESA Program received \$381,663 in co-funding for HECWs. These partnerships help the ESA Program extend the authorized level of funding to reach more customers.

SoCalGas continues to collaborate with Metropolitan Water District (MWD) to develop a strategic partnership to leverage program funds from water conservation rebates for the installation of HECWs. MWD is the largest supplier of treated water in the U.S. and serves the most populous areas of SoCalGas' service territory. MWD, ESA Program, and an EE staff held several meetings to discuss leveraging, and as a result signed a Memorandum of Understanding (MOU) in PY2014. SoCalGas anticipates to begin leveraging activities between MWD and the ESA Program in PY2015.

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

For SoCalGas' ESA Program dollar savings, energy savings/benefits, and enrollment increase tracking and reporting associated with leveraging efforts. Please see ESA Program Table 14 for additional details regarding leveraging and integration activities.

SoCalGas continued discussions to renew a contract for leveraging efforts with Imperial Irrigation District in PY2014. Additionally, SoCalGas entered into an agreement with Anaheim Public Utilities that includes a low-income energy efficiency component. In a larger context, these types of combined efforts are intended to result in fewer vehicles being dispatched for enrollment and installation processes, thereby aiding in the conservation of resources in a global, integrative, and sustainable approach. Furthermore, customers of these joint partnerships benefit from a full suite of measures, as opposed to customers receiving measures from just a single program. Customers will ultimately see a

larger impact on their total energy and bill savings, and benefit from the additional comfort from a more comprehensive measure package. Finally, receiving measures from multiple providers at the same time is a customer convenience and avoids duplicative verification, enrollment, installation, and inspection processes.

By working with the five water agencies mentioned above, their staff is now educated on SoCalGas' ESA Program and may raise awareness among their counter parts at other water utilities.

Leveraging with water utilities allows water districts and water IOUs to claim over 10,000 gallons per washer per year savings, and demonstrates SoCalGas support for statewide conservation efforts to address the water scarcity issues. HECWs costs may otherwise prohibit low-income customers from realizing the water and energy savings. For water utilities that do not have direct install programs with HECWs, leveraging with the ESA Program provides an opportunity to reach low-income customers that would otherwise not be able to fund the difference between the appliance cost and available water utility rebate offers.

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

SoCalGas and the California Department of Community Services and Development (CSD) has continued to employ a leveraging framework as a means to increase participation from LIHEAP agencies that are also SoCalGas ESA Program providers, and to record installations of measures common to both ESA and LIHEAP to meet the three measure minimum requirement. The LIHEAP framework resulted in 162 leveraged enrollments in PY2014, compared with 477 in PY2013.

In PY2014, SoCalGas completed a pilot with CSD that leveraged with the IOU ESA Programs. In PY2014, SoCalGas provided marketing and outreach support for CSD's Low-Income Solar Water Heating (SWH) installation program. Overall, in PY2014, SoCalGas sent over 12,000 direct mail pieces to ESA Program customers that were potentially eligible to receive a SWH. In addition, the e-mail communication channel was added to reach customer. Both direct mail and e-mail efforts were focused on raising customer awareness regarding the potential opportunity to receive a no-cost SWH through CSD, and directed customers to CSD's call center. Other touchpoints included door-to-door canvassing efforts within Orange County. This face-to-face interaction allowed customers the opportunity to ask questions about the program. Approximately 1,500 customers were targeted.

SoCalGas also participated in monthly meetings on the other pilots, including geographic coordination, bulk purchasing, and data sharing. SoCalGas plans to continue to work with CSD on joint leveraging opportunities in PY2015.

1.7. Integration Success Evaluation

1.7.1. Describe the new efforts in program year to integrate and coordinate the Energy Savings Assistance Program with the CARE Program.

- Data Sharing:

The ESA Program shares data with CARE. Customers who are found in the ESA Program system are automatically enrolled for the CARE discount and exempt from PEV if their income eligibility has been verified by the ESA Program.

Additionally, ESA Program uses lists of all eligible CARE customers who have not received ESA Program services to target marketing campaigns. During 2014, SoCalGas ESA Program Outreach began a direct mail campaign that targets all new customers that were automatically transferred onto the CARE program. The reason for this campaign is that this segment of low-income

customers have just moved into a new premise that may be eligible for ESA Program measures.

- Integrated Voice Recognition (IVR):

Multi-lingual ESA Program and CARE messages are made available on the SoCalGas' main call center Integrated Voice Recognition (IVR) system. If a customer is establishing a new gas-service account, they will hear an automated message that includes information on Customer Assistance Programs including: CARE, ESA Program, and Medical Baseline. This message is also reinforced by live customer representatives when customers call-in to discuss bill payment arrangements.

- Branch Payment Offices:

ESA Program and CARE information is displayed or is available at SoCalGas' 47 branch payment offices. When income guidelines are updated each year, all branch offices receive new brochures, which are regularly replenished. Branch Payment Office Clerks are trained to promote both the CARE and ESA Programs.

- Customer Contact Center:

Customer Service Representatives (CSRs) provide information regarding Customer Assistance Programs to facilitate enrollment of eligible customers. Customers are informed about CARE at every call to initiate gas service or when making payment arrangements. When a customer inquires about the ESA Program a direct 800 telephone number is provided. Also, SoCalGas offered information on integrated programs for residential customers by mailing a conservation package during customer contact center bill inquiries; the package included information on CARE, the ESA Program, Medical Baseline, energy efficiency rebates, energy-saving tips to help customers manage their gas bills, and was paired with information regarding CSD Programs.

- Email Campaigns:

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

- Credit and Collections:

During collection days, SoCalGas Field Representatives deliver pending disconnection notices in person to senior citizens and disabled customers. Because collections involve customers who are struggling to pay their bills due to financial issues, customer assistance information is provided by the field collectors, who educate customers about CARE and the ESA Program.

- Winter Media Campaign:

The CARE and ESA Programs were promoted as part of the yearly winter media campaign to bring awareness to customers who are eligible to enroll and have not participated in these programs.

- Outreach by Field Employees

Field service employees distributed Customer Assistance Programs flyers to customers when entering the customer's premises. This distribution occurs throughout the year. SoCalGas employees that entered customer homes left more than 300,000 flyers during PY2014.

1.7.2. Describe the new efforts in program year to integrate and coordinate the Energy Savings Assistance Program with the Energy Efficiency Residential Program.

Integrated Demand Side Management

As part of the ESA Program Multi-Family (MF) strategy implementation, SoCalGas' ESA Program expanded its outreach to MF building owners and managers by incorporating:

- An engagement strategy that utilized a single-point-of-contact to connect multifamily property owners and managers with utility programs and services.
- MF portfolio owners and managers were assigned a SoCalGas Account Executive.
- SoCalGas Account Executives assisted in identifying and implementing projects to save:
 - Natural gas
 - Electricity
 - Water
- SoCalGas also coordinated with other utilities to integrate Energy Efficiency and Low Income programs, e.g, a joint partnership with Los Angeles Department of Water & Power.

Energy Upgrade California™ Home Upgrade Program

In PY2014, the ESA Program continued to collaborate with the Energy Upgrade California Home Upgrade Program (HUP) program for residential customers on the implementation of the Middle Income Direct Install (MIDI) Program Pilot. The MIDI Program will install no cost measures for customers living in single family or multifamily households whose income falls outside of the ESA Program income requirements (201-300% of the FPL). Eligible customers will receive energy education, which will explain HUP requirements and benefits.

The ESA Program works in tandem with the MIDI program by sharing program infrastructure information to aid in the identification of enrollment opportunities, and identifying and training joint-MIDI contractors. The MIDI Program is marketed by select contractors in the normal course of working to enroll customers into the ESA Program. Customers that are above the ESA Program income guidelines and below 300% of the FPL are offered the MIDI Program. Furthermore, MIDI program participants are encouraged to install

additional comprehensive energy efficiency improvements beyond MIDI Program offerings.

Energy Efficiency Direct Install Programs

In PY2014, SoCalGas' ESA Program coordinated with EE Programs to ensure that income qualified customers received assistance from the ESA Program before receiving EE measures. The ESA Program provides the greatest impact and most direct benefit to low income customers.

By assessing low-income customers for ESA Program measures before EE installations are made, SoCalGas increases the likelihood that the three measure minimum standard within the ESA Program can be met. The three measure minimum (3MM) is of particular concern for SoCalGas, because as a single fuel utility, it has less potential measures to offer relative to dual fuel utilities. The ESA Program and EE programs coordinate a screening process to ensure that all eligible low income customers are first given the opportunity to achieve the maximum energy and cost savings offered by the ESA Program.

1.7.3. Describe the new efforts in program year to integrate and coordinate the Energy Savings Assistance Program with the Energy Efficiency Government Partnerships Program.

SoCalGas ESA Program participated in monthly coordination meetings with the Local Government Partnership Programs and the Regional Energy Network. Furthermore, the ESA Program has stayed in tune with various other Local Government Partnership efforts, including support of the Better Buildings Challenge.

1.7.4. Describe the new efforts in program year to integrate and coordinate the Energy Savings Assistance Program with any additional Energy Efficiency programs.

As part of the Integrated Demand Side Management directive and ESA Program MF strategy, SoCalGas' ESA Program expanded its outreach to MF building

owners and managers to gain connections within the non-profit affordable housing marketplace. Please refer to section 1.7.2 for additional highlights.

1.7.5. Describe the new efforts in program year to integrate and coordinate the Energy Savings Assistance Program with the Demand Response Programs.

SoCalGas does not have a residential demand response program; therefore, this section is not applicable to SoCalGas.

1.7.6. Describe the new efforts in program year to integrate and coordinate the Energy Savings Assistance Program with the California Solar Initiative Programs.

The CSI – Solar thermal pilot program concluded in PY2014.

1.8. Workforce Education & Training

1.8.1. Please summarize efforts to improve and expand Energy Savings Assistance Program workforce education and training. Describe steps taken to hire and train low income workers and how such efforts differ from prior program years.

Throughout PY2014, SoCalGas enhanced ESA Program workforce education and training by continuously improving the delivery of its enrollment and assessment classes, In-Home Energy Education, and its customer enrollment forms.

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

requirements and expectations for customer interactions to participants, each course supported the development of expert ESA Program knowledge at all levels and stages, from front line to back office, and from newly hired to tenured personnel.

SoCalGas works with its contractor network to improve its Enrollment and Assessment training by consistently seeking feedback on training requirements and curriculum. Students who attend SoCalGas' Enrollment and Assessment training are asked to complete a class evaluation form to rate the class and provide feedback. Consideration is given to the student's feedback and suggestions are incorporated where feasible. As a result of constructive feedback on the topic, a series of customer enrollment exercises were incorporated into the curriculum to assist outreach specialists in understanding the different methods available to enroll customers into the ESA Program. These exercises include completing a customer enrollment under different household compositions and sources of income. Although this has been a part of the curriculum in the past, the exercises were updated and new scenarios were included to assist the students in understanding the policies being presented. The exercises also presented a better hands-on understanding of the Customer Agreement form and all of the information it entails.

To collect even more contractor feedback, SoCalGas conducted an Outreach Specialist Focus Group in October of PY2014 with the purpose of collecting information about enrolling customers in the ESA Program. The focus group addressed topics such as best practices, contractor marketing collateral, enrollment tools, and obstacles and deterrents. SoCalGas used the results of the focus group to enhance its initial and refresher Outreach Specialist trainings to better equip the participants with addressing barriers related to enrolling customers into the program.

SoCalGas was expedient in making curriculum changes and updates that resulted from any CPUC decision or studies. SoCalGas continues to develop the core elements of In-Home Energy Education as well as the delivery methods to ensure ESA Program participants are provided with both useful, relevant information and energy saving tips they can incorporate into their daily routines. This supports SoCalGas' goal of ensuring the information is easy to understand for the service providers delivering the In-Home Energy Education and at the same time making them knowledgeable instructors of energy education.

SoCalGas also used the recommendations from the Energy Education Phase 1 study as the basis for some of its In Home Energy Education enhancements. These enhancements include the development of the Energy Education Wheel and the Energy Education coloring and activity book. This material is in addition to incorporating cold water savings tips and conservation practices into the curriculum to support addressing the drought in the state of California. These enhancements allow the delivery of In Home Energy Education to have an even greater impact during the enrollment process, and transform Energy Education into a more valuable and coveted component of the program. Not only do the new tools and material incentivize customers to participate, but they also cultivate and promote energy savings and conservation practices at a deeper level within the low income community. These materials will be implemented into the ESA Program and distributed in PY2015.

As part of the ongoing effort to provide continuous enrollment and assessment training to the ESA Program contractor workforce, 227 new Outreach Specialists were trained and badged in PY2014. This included students from two special enrollment and assessment classes provided at individual contractors locations to assist with enrollment ramp-up efforts.

One important SoCalGas goal was the effort to retain the contractor workforce and decrease high turnover of Outreach Specialists by closely monitoring enrollment practices and provide refresher training throughout the year and after important program changes and/or updates. In PY2014, SoCalGas successfully provided nine Enrollment and Assessment refresher courses for 492 Outreach Specialists and back office personnel. This included six sessions held at the Energy Resource Center, where a total of 411 participants attended, equivalent to 84% of active Outreach Specialists, to receive training on forms associated with the enrollment process. The forms training was delivered over the course of four days, while additional days were reserved for SoCalGas to visit individual contractors at their local offices to provide the training. This supports SoCalGas efforts to improve and expand the training provided to both the office and field workforce. Ensuring that all personnel receive the same training mitigates confusion or misunderstanding of new policies and procedures at the time of implementation.

One of the forms featured at the training was the Joint IOU Property Owner Authorization (POA) Form, which was implemented in PY2014. SoCalGas took the lead in working with all IOUs to create a Joint IOU POA Form that is accepted across the IOUs to prove owner authorization for ESA Program services. The Joint IOU POA combined elements of each utilities' required fields and legalese into one comprehensive form. The form and legalese were approved across the IOUs, and an implementation plan, universal training, and sharing process were developed and successfully deployed. With this Joint IOU POA, contractors providing services to more than one IOU can obtain one signature from the property owner, eliminating redundant documentation and minimizing enrollment time.

To ensure that all personnel receive the same training, SoCalGas and SCE also made strides in aligning all aspects of its processes by aligning fees, acceptable eligibility documentation, and energy education to streamline the enrollment process and decrease duplicate documentation. SoCalGas and SCE have established a baseline and sharing process for the aptitude testing of new Outreach Specialists planning to attend training. SoCalGas and SCE's training personnel have found opportunities to update their respective curriculums to address a joint utility energy education. SoCalGas and SCE have started the standardization process by developing new presentations for their In-Home Energy Education curriculum, covering all Commission mandated topics such as gas appliance safety, earthquake safety and proper CFL disposal, amongst other newly added topics such as water conservation. These topics are designed to present an organized energy education presentation to the customer by the assessor.

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.

SoCalGas continued its internal training programs which contribute to the goals of workforce development. SoCalGas provides two areas of training:

1) Enrollment and Assessment (E&A) and 2) ESA Program Operations. To help facilitate and encourage student enrollment into training, SoCalGas manages several custom email inboxes to help streamline communications with its contractor network. The ESA Program training supported by SoCalGas is critical in maintaining a high quality of service for ESA Program customers as well as for program implementation. In addition, when registration for classes is not at capacity, SoCalGas will take the initiative and notify its enrollment and assessment contractor network of the space availability to encourage new Outreach Specialist recruitment for the ESA Program.

SoCalGas requires contractors to ensure that their employees are trained in the jobs that they perform. ESA Program services, including assessment, enrollment, and installation of measures, are provided by third party contractors. Thus, the students attending these training classes are hired by the ESA Program contractor network. Some outreach specialists are subcontractors to the ESA Program contractors and may not be direct employees. However, all potential outreach specialists must successfully pass the required SoCalGas training and background check.

After successful completion of the Skill Level Test, the potential Outreach Specialist attends a mandatory 5-day class which reviews the requirements for enrollment, assessment and in-home energy education. The 5-day class covers utility-specific items related to policies, security process and overall customer service standards as well as for leveraging opportunities amongst other low-income programs. A final exam must be passed, along with having an active Home Improvement Sales Registration with the California State Licensing Board, for an Outreach Specialist to be eligible to receive a SoCalGas badge. The total number of newly badged outreach specialists for SoCalGas in PY2014 was 227. The classes are held at SoCalGas' Energy Resource Center located in Downey, California.

During PY2014, SoCalGas did not identify any participation of previous U.S Census employees with its enrollment and assessment contractors for ESA Program outreach.

Type of training or recruitment conducted	Students¹ attended	Students² eligible
Skill Level Test ³	395	332
Enrollment & Assessment Class ⁴	260	227
¹ SoCalGas does not hire employees to provide outreach and assessment or weatherization services. The students that attend classes are recruited by SoCalGas ESA Program contractors. ² Students eligible refers to those who passed the necessary exams and/or are badged and thus, eligible to perform the job function related to the training. ³ Individuals are required to pass the skill level test to be eligible to take the Enrollment & Assessment Class. ⁴ Employees eligible refer to those individuals who received an ESA Program badge upon successful completion of the Enrollment & Assessment Class.		

SoCalGas field operations training includes initial training for new participants in weatherization, inspections, HVAC and NGAT. Additionally, SoCalGas provides refresher training primarily to address contractor issues and discuss new measures and procedures that have been implemented into the program. The class sizes range from 5 – 35 technicians. The contractor representatives are hired employees of the ESA Program contractors and are expected to arrive with the skill sets required to complete installation services. Installers were also given an aptitude test that they must pass in order to receive an identification badge to work under the SoCalGas ESA Program. This is in addition to a review of customer service standards and expectations. The table below summarizes field training efforts for PY2014.

The table below summarizes field training efforts for PY2014:

Class Type	Number of Students	Number of Classes
Weatherization and HVAC Initial	108	27
Weatherization Refresher	32	8
NGAT	57	14

In an effort to improve program delivery, SoCalGas provides its Enrollment and Assessment Contractors' back office support and processing staff training

through Enrollment Workshops offered throughout the year. SoCalGas hosts the workshops at its ERC facility. There were a total of 492 workshop attendees, with participants from all 30 of the Enrollment and Assessment Contractors. These sessions addressed important program updates, provided an overview of new program requirements, and served as a general refresher course for all participants. SoCalGas believes that these workshops improved the participants' understanding of the enrollment process and customer enrollment requirements.

1.9. Legislative Lighting Requirements Status

Because SoCalGas is a gas-only utility, Section 1.9 is not applicable to the SoCalGas ESA Program.

1.10. Studies

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

Four statewide studies were authorized for the current program cycle. These included: (1) an impact evaluation of the PY2011 ESA Program; (2) an ESA energy education study; (3) a low-income needs assessment study; and (4) a low-income multifamily segment study. These studies are described below.

D.12-08-044 was adopted at the end of August of PY2012. Consultants for each study were selected through bid processes conducted during the last quarter of PY2012. Contracts were awarded and work on each study began in first quarter PY2013.

All four studies were completed in PY2013. 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 D.12-08-044, posed

some challenges for each of the studies which included the budgets allocated and the extremely aggressive schedules of each study. Table 1.10.2 below provides an overview of the ESA Program studies and a description of each study.

TABLE 1.10.2: ESA PROGRAM STUDIES

ESA Program Study	Consultant	Managing Utility	Project Initiation	Public Meetings	Final Report
ESA MF Segment Study	Cadmus Group	PG&E	1/18/2013	3/5/2013 9/25/2013 11/13/2013	12/4/2013
ESA Energy Education Study	Hiner/KEMA	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 Utility²⁵ Low Income (MF) Segment Study

PG&E was the Contract Manager for the MF Segment Study and the research contractor for this study was the Cadmus Group. The central goal of the study was to develop market segment profile information to investigate promising comprehensive MF segment strategies. The strategies are to help develop and advance long-term plans to meet the needs of low income customers living in California MF housing as either owners or renters.

There were six key activities in this study designed to meet D.12-08-044's research objectives:

1. Gather California MF housing data relevant for low income Customer Assistance Programs.

²⁵ The Joint Utilities are PG&E, SCE, SoCalGas, and SDG&E.

2. Catalog existing MF EE Programs relevant for low income customers.
3. Review and evaluate MF 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 comments 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 also conducted with IOU program managers and MF stakeholders, in addition to conducting a phone survey with property owners and operators.

The MF segment study focused on the needs and issues of MF property owners and operators in their role as the ultimate decision-maker responsible for program participation in a WNA, especially because this focus was a response to the D.12-08-044 directive to explore a WNA.

One challenge for the study was the difficulty getting property owners to participate in the survey. This was especially true with market rate MF building owners, who own the majority of California MF properties. These building owners, representing the majority of MF properties, were much harder to reach than owners and operators of affordable housing properties who have greater incentive 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 MF 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 MF segment study found that 30% of all California residential households qualify for the ESA Program statewide, low income MF households represent approximately 9% of total California residential households, 7% of these low income MF households live in market-rate buildings, 2% in affordable housing, and less than 1% own their unit. Changing the focus to all low income households, the study found that 32% of low income households reside in MF buildings with five or more units. The percentage of low income MF households varies widely across the IOUs, ranging from 27% to 39%. Finally, when viewed across the spectrum of all California MF households, 42% of households qualify as low income.

Joint Utility ESA Program Energy Education Study

The prime research contractor for the ESA Program Energy Education study was Hiner and Partners, with KEMA employed in a subcontractor role. 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 ESA Program. 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 Energy Education study examined both current and potential best practices across the IOUs and comparable efforts done elsewhere to inform potential improvements to this component of the program.

Overall, the study found the ESA Program's Energy Education assisted customers 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 education, the study found that the interactive customer-specific delivery process is effective and follows best practices. In addition, assessor recruitment, selection, and retention processes, and training has been effective, although varied across the IOUs. Recommendations for potential improvements are 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 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 Energy Education study found that while the materials are relatively comprehensive, some suggestions for modifications and improvements were offered. Most notably, the study found that customers are 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 and the final report was issued and posted on October 31, 2013.

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 study was over five years old and relied on data collected nearly 10 years ago. The overall study objective was to provide information on the needs of the low income customers eligible for the ESA Program and CARE. In particular, the study was expected to: report estimates of eligible households, inform updates of remaining energy savings potential, assess customer perceptions and

accessibility of the programs, willingness and barriers to participate, energy burden and insecurity, energy-related needs, and non-energy benefits. Select results and conclusions of the LINA study include the following:

- Roughly 32% of California IOU households are eligible for the ESA Program and CARE. 95% of eligible IOU households were enrolled in CARE as of the end of PY2012,²⁶ and 59% of eligible households have been treated by ESA Program.
- Both the ESA Program and CARE have been effectively reaching households in areas having key markets with customers in need. The ESA Program has been less successful reaching areas with more renters, extreme poverty, and higher energy usage.
- Key barriers to ESA Program participation include trusting a contractor, getting the landlord's approval, being home for appointments, and needing services the program offers. Providing income documents was not found to be a barrier.
- Roughly 52% of eligible customers are willing to participate in the ESA Program. This is significantly fewer than was estimated by the previous Needs Assessment study, which indicated that 95% were willing to participate.
- The mean energy burden is estimated at 8%.²⁷ This is statistically unchanged from PY2005 data collected for the previous LINA study.
- Single-family renters have greater energy-related needs and barriers to participation than single family homeowners and multifamily dwellers.

²⁶ Note that as the IOUs increase PEV, the penetration rate is going down as more households are removed from the program. "Needs Assessment for the Energy Savings Assistance and the California Alternate Rates for Energy Programs" Report by Evergreen Economics, dated December 26, 2013.

²⁷ Based on taking the mean of customer-level ratios of energy burden.

- The average CARE customer saves \$29/month (33% savings) on their electric bill and \$6/month (18% savings) on their gas bill.
- 81% of ESA Program participants notice a reduction in their energy bills and between 44% -64% notice improvements in health, comfort, and safety. The energy savings results are consistent with actual changes in bills.
- Self-reported data suggests that HVAC and weatherization measures are more likely to generate savings and improvements in health, comfort, and safety. The next most beneficial measure was a refrigerators by electric service providers.

The final study results were presented at a public workshop on December 3, 2013, with the final report issued in three volumes and posted on December 16, 2013.

Joint Utility 2011 ESA Program Impact Evaluation

The Impact Evaluation was a statewide study managed by SDG&E. The prime research contractor for the PY2011 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 PY2011 ESA Program. The results are used to quantify the PY2011 ESA 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% confidence interval of the impact estimate and if not, evaluator judgment was used to assign a value from an alternate model or use 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 Program 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 which included weather, measure mix, and participant demographics.

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 PY2013 and final reports are available at www.energydataweb.com. 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	Consultant	Managing Utility	Budget Authorized²⁸	Budget Expensed	%*
ESA MF Segment Study	Cadmus Group	PG&E	\$400,000	\$399,340	100%
ESA Energy Education Study	Hiner/KEMA	SCE	\$300,000	\$243,428	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%

* Values rounded to nearest percent.

1.11. Pilots

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

SoCalGas did not undertake any Pilots in 2013; thus, this section is not applicable to SoCalGas.

1.11.2. If applicable, submit Final Pilot Report describing: 1) Overview of pilot; 2) Description of Pilot Evaluation Plan (PEP); 3) Budget spent vs. authorized budget; 4) Final results of pilot (including effectiveness of the program, increased customer enrollments or enhanced program energy savings); and 5) Recommendations.

This section is not applicable to SoCalGas.

²⁸This amount represents the total authorized Joint Utility study budget, and not an individual utility's share of the budget. The authorized Joint Utility budget split is: PG&E--30%, SCE--30%, SoCalGas--25%, and SDG&E--15%.

1.12. “Add Back” Measures

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

The inclusion of “add backs” in the current program will not impact the utility’s ability to meet the 2020 plan goal that 100% of eligible and willing customers will have received all cost effective ESA Program measures because SoCalGas is able to control program costs and deliver all feasible measures to customers through effective program management. The total count and expenditures related to “add back” measures are provided in ESA Program Table 16. Because SoCalGas does not currently anticipate adverse impacts to the program, it will continue to install the “add back” measures, when feasible.

2. CARE EXECUTIVE SUMMARY

The SoCalGas California Alternate Rates for Energy (CARE) program, formerly known as the Low Income Ratepayer Assistance Program (or LIRA) was established through a legislative mandate and was implemented by the Commission in D. 89-07-062 and D. 89-09-044. The Commission expanded the program to qualified non-profit group living facilities such as women’s shelters and homeless shelters in 1992. The program was further expanded to qualified agricultural employee housing facilities in D.95.10-047. In 2005, D.05-04-052 expanded the program to include authorized agricultural housing facilities managed by the Office of Migrant Services and other non-profit migrant farm worker housing centers.

Since PY2005, income eligibility for CARE was set by the Commission at 200% of the Federal Poverty Guidelines.²⁹ In PY2010, the legislature enacted Senate Bill 695 which

²⁹ D. 05-10-044.

changed section 731.9 of the Public Utilities Code to state that eligibility for the CARE program should be no greater than 200% of the Federal Poverty Guidelines. In PY2006, the Commission authorized utilities to implement: 1) Categorical Eligibility which allowed customers to qualify for CARE based on their participation in certain state or federal assistance programs; 2) four-year recertification for low income customers on a fixed income; 3) a process to enroll certain prospective CARE-qualified households by telephone; 4) a process to all customers to recertify their CARE eligibility through the IVR system; and, 5) internet-based CARE enrollment and recertification.

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

CARE was authorized for program years (PY) 2012 – 2014 pursuant to D.12-08-044, approved by the Commission and issued on August 30, 2012. In approving the program the Commission retained the 90% penetration rate target of the prior program cycle and outlined in D.08-11-031, with direction to utilities to focus on aggressive outreach activities and other program enhancements to ensure the integrity of the CARE Program. Other key initiatives include updates to the utilities' post-enrollment verification probability model to include more indicators, a process to review and update the list of categorical programs annually, and approval of outreach and marketing funds focused on targeting multi-cultural/multi-lingual and limited English proficient (LEP) customers.

This report provides information on the SoCalGas CARE program accomplishments and expenditures for PY2014. At year-end of PY2014, the CARE Program had enrolled over 333,630 new customers and ended PY2014 with a penetration rate of 82.60%. SoCalGas

continues to work towards meeting the CPUC-directed CARE Program goals and objectives. Various results for PY2014 are provided in the sections below.

2.1. Participant Information

2.1.1. Provide the total number of residential CARE customers, including sub-metered tenants, by month, by energy source, for the reporting period and explain any variances of 5% or more in the number of participants

CARE Residential Program Customers by Month		
Month/Year	Customers	% Change
Jan-14	1,606,546	0.13%
Feb-14	1,604,487	-0.13%
Mar-14	1,600,381	-0.26%
Apr-14	1,600,444	0.01%
May-14	1,589,127	-0.71%
Jun-14	1,585,872	-0.20%
Jul-14	1,588,004	0.13%
Aug-14	1,583,140	-0.31%
Sep-14	1,564,293	-1.19%
Oct-14	1,560,857	-0.22%
Nov-14	1,565,516	0.30%
Dec-14	1,568,011	0.16%

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

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

The most recent important change affecting the eligibility estimates was the passage of Assembly Bill (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.3593], but returned to “bundling” one- and two-person households at the HHS-defined 200% FPL 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 American Community Survey Public Use Microdata Sample (PUMS) 2009-2013 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. Quarterly, SoCalGas applies county/utility level eligibility fractions to a new set of “technical eligibility counts” (for CARE these are metered and sub metered occupied housing units) obtaining an estimate of income/demographic eligibility in household count form. Monthly, SoCalGas counts the number of households that are enrolled in CARE in each county. The CARE household total by county, including individually

metered and sub-metered occupied housing units, is divided by the total income/demographic eligibility.

A refinement in 2007 made use of Census Advance Query, PUMS, and SF3 tabulations to develop estimates specific to “payer types”: i.e., individually metered, sub-metered, and non sub-metered master meter customers. In 2012, Athens Research developed an improved method for estimation of payer status-specific eligibility. This method took into consideration the 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 geographic levels.

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

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 PY2014.

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

To derive the estimates of current CARE-eligible meters, SoCalGas counts all residential individually metered and residential sub-metered units as the number of eligible residential meters for the CARE Program in the SoCalGas territory.

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

Each quarter, (January, April, July and October), SoCalGas applies the county and utility eligibility rates to its current set of CARE-eligible meters that includes both individually and sub-metered housing units. Once the factors are applied, estimates for CARE eligible-households by county were developed.

2.1.2.4. Describe how current CARE customers were counted.

Currently CARE customers were counted by totalling the number of individually metered residential customers plus the number of sub-metered tenants receiving service through residential master-metered accounts receiving CARE discount at the time.

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

The formula for calculating CARE-participation is:

$$\frac{\text{Number of CARE Customers}}{\text{Number of Estimated CARE-Eligible Households}}$$

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

SoCalGas is a single energy-source utility (natural gas). At year-end of PY2014, of SoCalGas' 5,457,118 CARE-eligible meters, 34.79% or 1,898,302 households were estimated to be eligible for the CARE discount.

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

At the year end of PY2014, SoCalGas had 143,667 sub-metered tenants in 1,812 master-meter facilities. Assuming, by the methodology described above, 54.88% of its sub-metered residential customers are eligible for CARE, SoCalGas estimates 78,844 78,873 of its sub-metered tenants are CARE eligible.

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

As of year end of PY2014, SoCalGas had 35,326 sub-metered tenants participating in the CARE Program.

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

SoCalGas estimates 44.8 % of its CARE eligible sub-metered tenants were enrolled in the CARE program as of as of the end of PY2014.

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

In PY2014, SoCalGas did not encounter any problems in administering the CARE Program for sub-metered and/or master-metered customers.

CARE Program Summary

2.2. Please provide CARE program summary costs

CARE Budget Categories	Authorized Budget	Actual Expenses	% of Budget Spent
Outreach	\$3,750,223	\$4,424,684	118%
Proc., Certification and Verification	\$4,488,248	\$1,033,376	23%
Post Enrollment Verification	\$3,744,000	\$333,764	9%
Information Tech./Programming	\$2,937,450	\$897,354	31%
Pilots (2)	\$180,000	\$75,000	42%
Measurement and Evaluation ¹	\$18,659	\$63,254	339%
Regulatory Compliance	\$242,507	\$367,741	152%
General Administration	\$943,426	\$808,918	86%
CPUC Energy Division Staff	\$60,000	\$17,512	29%
Cooling Centers (3)	N/A	N/A	N/A
Total Expenses	\$16,364,513	\$8,021,603	49%
Subsidies and Benefits (4)	\$131,142,177	\$109,488,808	83%
Total Program Costs and Discounts	\$147,506,690	\$117,510,411	80%

¹ In November 2014, SCG increased PY 2014 M&E category budget by \$44,595 to fund M&E activities. The shift was funded from the unspent 2012 & 2013 available balance of \$55,789 reflected in the revised authorized budget D14-08-030.

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

CARE Penetration Year-end 2014			
Participants Enrolled	Eligible Participants	Penetration rate	Target Met?
1,568,011	1,898,302	82.60%	No

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

CARE Recertification

Month	Complaints Received	Nature of Complaint	Cases Resolved
April	1	Customer had concerns regarding the recertification process and was referred to the CARE Program staff directly. The customer claimed the recertification paperwork was filled out incorrectly. A CARE representative contacted the customer three times and left a voice message, but did not receive a response and therefore was terminated from the program due to high income. The customer was re-enrolled on August 2014 and is now on the program.	Yes
May	1	Customer claimed she submitted the CARE recertification form at the same time she submitted the Southern California Edison recertification form and took a picture of the completed form. The recertification form was never received by CARE representatives and the customer was taken off CARE Program. Customer wanted to be reinstated as soon as possible. Customer was contacted by a CARE Representative and her account was back billed for one month. The customer has health issues and was mailed a Medical Baseline application. The customer was satisfied with the response by the CARE Representative.	Yes
October	1	Customer was confused by the form layout and suggested modifications. To prevent customer misinterpretation of the requirements, SoCalGas will revisit the current form design and make revisions as needed when new income eligibility guidelines are established and the form is updated.	Yes

2.3. CARE Program Costs

2.3.1. Discount Cost

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

The average monthly discount received per SoCalGas CARE customer in PY2014 was \$6.06³⁰ per month.³¹

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

SoCalGas' CARE customers and expanded CARE customers (i.e. farm and migrant workers, and those living in non-profit group living facilities or agricultural housing) received \$106,731,701 in natural gas rate discounts and \$2,757,107 in Service Establishment Charge (SEC) discounts in PY2014. The PY2014 annual subsidy for all SoCalGas CARE customers exceeded \$109 million.

2.3.2. Administrative Cost

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

See section 2.2 or CARE Table 1 in the attachments.

2.3.2.2. Explain what is included in each administrative cost category

Outreach: This category includes costs for the printing and mailing of CARE applications and correspondence, the printing and mailing of Senate Bill (SB) 920 annual notification,³² postage, bill inserts, brochures,

³⁰ The average monthly rate discount was computed by dividing the CARE rate discount recorded to the CARE balancing account in 2014 by the monthly residential CARE customers: the total of the 12 months was then divided by 12 for the average monthly CARE discount per customer.

³¹ This number does not reflect the CARE customers who received a discount on their Service Establishment Charge (SEC).

³² SB920 requires that homeowners and residents of a master-metered park shall receive notification in their utility billing statement of the assistance available to them under the CARE Program. This notification must be received on or before February 1st of each year.

flyers, advertising, direct mailing campaigns, telephone campaigns, web campaigns, third party outreach, community event sponsorships and support, distribution of collateral materials, outreach staff labor, and other outreach and enrollment efforts. Capitation payments and any agency-related outreach support efforts are also included in this category. Capitation payments are compensation fees paid to CBOs that assist SoCalGas in enrolling hard-to-reach CARE-eligible customers in the program.

Processing and Certification: This category includes costs for the CARE Processing Group labor and document scanning costs. The function of the CARE group includes: 1) opening and sorting CARE application forms; 2) processing CARE applications; 3) initiating and responding to customers' inquiries regarding CARE applications and/or the program; and 4) tracking CARE enrollment and operating statistics in support of operations, management, and regulatory reporting, and 5) SoCalGas' CARE forms scanning operation costs .

Post Enrollment Verification: CARE eligibility verifications are tracked separately. This category includes staff labor costs for processing the verification applications and supplemental documentation, handling verification-related calls, and training.

Information Technology (IT) Programming: This category includes IT labor costs to maintain the SoCalGas CARE application billing system, CARE IVR applications, CARE on-line applications, CARE documents, CARE database, system reports, data exchanges with other utilities, charges to conduct system enhancements to comply with Commission mandates, and improvements in operational efficiency.

Pilots: This category includes costs related to the Community Help and Awareness with Natural Gas and Electricity Services (CHANGES) Pilot program.

Measurement and Evaluation: This category includes costs for the annual CARE eligibility rate updates.

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

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

Commission Energy Division Staff Funding: This category includes costs incurred by Energy Division staff in support of the Commission's authorized low-income programs.

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

At year end of PY2014, the CARE balancing account was over-collected by \$29,675,858.

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

The recorded costs in the CARE balancing account include the Service Establishment Charge discounts, all rate discounts, surcharge revenues, amortization, interest, and administrative costs described in Section 2.3.2.2. The costs recorded in the CARE balancing account are not included in base rates.

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

See CARE Table 10 in the attachments.

2.4 Outreach

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

Utility Outreach: The objective of CARE Outreach is to maintain awareness with mainstream customers while expanding awareness to hard-to-reach customers. To meet this goal, SoCalGas continued to use both traditional communication and grassroots tactics to extend awareness and participation in the CARE Program. Traditional tactics include mass media advertising purchases, direct mail, automated messaging, bill inserts, door-to-door canvassers, and participation in community outreach events. In addition to these traditional tactics, SoCalGas has continued to work with community and faith-based organizations to enhance awareness of the CARE discount.

Ethnic Media: Ethnic media plays a crucial part in communicating with hard-to-reach customers. SoCalGas has an ongoing advertising contract with Radio Campesina (KMYX, Bakersfield & KUFW, Visalia) to encourage awareness of Customer Assistance Programs, especially among farmworkers with limited English proficiency. The radio spots are short, 30 second Spanish language ads that run several times a day. In addition to the radio spots, SoCalGas's relationship includes periodic, on-air interviews. These interviews are in Spanish, and a SoCalGas representative is able to discuss low-income programs in greater detail.

During the summer, SoCalGas continues to sponsor weekly lunches for farmworkers. SoCalGas representatives meet farmworkers during their lunch break, and Radio Campesina broadcasts spots from the field. Radio Campesina

also hosts several “classrooms” of the month throughout the year, and SoCalGas is invited to attend the classroom and distribute branded SoCalGas “Low-Income Programs” giveaways and bilingual collateral.

SoCalGas also had ongoing advertisements in Spanish-language newspapers in Riverside (*La Prensa Hispana*) and in Los Angeles and Orange Counties (*El Aviso*). The year-round ads provide information on SoCalGas’s CARE program to a Spanish-language audience. Ethnic advertising is not a stand-alone concept, but is integrated into all communication campaigns. Therefore, the mass media campaigns should also be viewed as ethnic outreach. In mass media advertising, the ethnic language component is built into the basic job requirement. In addition, SoCalGas’ relations with community-based organizations (discussed below) also focuses on working with organizations that help reach ethnic audiences.

Mass Media: SoCalGas ran one mass media campaign in PY2014, and ethnic audience and ethnic ownership of the media outlets played a significant part in the overall strategy:

1. June/July/August: Digital/Radio/Print/Out-of-Home Media Campaign to Reinforce the June Bill Insert and Promote Awareness in the coastal counties of Ventura, Santa Barbara, and San Luis Obispo

The new CARE eligibility guidelines are implemented every year in June. A bill insert details the updated guidelines. SoCalGas ran a mass media campaign to reinforce the bill insert. To address low enrollment figures in Ventura, Santa Barbara, and San Luis Obispo counties, and cost advantages in purchasing mass media in non-Los Angeles and non-Orange County markets, SoCalGas’ Outreach coordinated the development of a digital, out-of-home, radio, and newspaper campaign in these three counties. The twelve-week campaign featured English-language traffic radio spots, a variety of digital and social media advertisements

(English and Spanish), newspaper ads (English and Spanish), and out-of-home tactics. The latter tactics featured ads on buses (English and Spanish).

Direct Mail: Direct mail continues to be a versatile and effective method for enrolling CARE customers. SoCalGas increased its direct mail advertising from the previous year. Most of the campaigns targeted existing customers with a probability of being eligible for the CARE Program based on attributes such as PRIZM code. SoCalGas also added systematic improvements to its direct mail campaigns. In addition to the targeted direct mail campaigns to customers that have a probability of being eligible for the CARE Program, SoCalGas sent out campaigns to new customers that have a probability of being eligible for the CARE Program. SoCalGas also piloted (and then instituted) a campaign that targeted those customers that had been on the CARE Program and failed to recertify. Additionally, SoCalGas continued to conduct its annual SB 920 targeted mailing (see Section 2.3.2.2. above) in its service territory to master-metered facilities with sub-metered customers in PY2014.

SoCalGas continues to maintain compliance with AB 2104 by mailing out the monthly *Add & Delete* report to notify owners/managers of sub-metered facilities about tenants who have been added to CARE or removed from the program. Lastly, SoCalGas remains in compliance with AB 2857 by approving eligible sub-metered tenants who live in a facility that is not 100% sub-metered.

Bill Message: During PY2014, quarterly CARE bill messages were printed in both English and Spanish on non-participating customers' bills. Additionally, when applicable, CARE bill messages were sent out 45 days after PEV letters were mailed to remind customers that SoCalGas had not received their verification application and proof of income. Further, if after 120 days SoCalGas had not

received a customer response, SoCalGas sent those customers a bill message informing them that they had been removed from the program.

Bill Inserts: Bill inserts are a low-cost method to create program awareness and encourage enrollment. The insert/applications are bilingual in English and Spanish, and contain basic information. In April, SoCalGas sent out a bill insert to approximately 3 million residential customers that were not on the CARE program. In June, SoCalGas sent out its annual bill insert to announce the annual revision in the income eligibility guidelines. In September, SoCalGas also sent out a bill insert to 250,000 commercial customers. The latter bill insert described the CARE rate for commercial facilities, such as non-profit group living and migrant farmworker housing.

Cross Program Promotion: SoCalGas coordinated communications for the CARE Program, as well as its other programs and services in a manner that provided clear, comprehensive, and consistent messages to its customers. Communication and outreach opportunities were sought out to cross promote the CARE Program with other Customer Assistance Programs and general market rebate and or incentive programs to maximize customer value and reduce costs. Mass media cross advertising campaigns incorporating both SoCalGas' CARE and ESA Programs are conducted on a rolling basis. The ability to apply for CARE through SoCalGas' ESA Program applications made it easier for customers to obtain services and other SoCalGas assistance program information simultaneously. Customer information obtained from SoCalGas' ESA Program and Gas Assistance Fund (GAF), along with LIHEAP, is used for CARE enrollment, recertification, and verification purposes. Certain collateral materials used by SoCalGas' outreach department and field operations personnel have been specifically designed to provide customers with information on all available low-income and special needs customer programs and services. Field Operations is

instructed to leave a bilingual flyer in English and Spanish every time a customer's home is entered for services. SoCalGas employees that entered customer homes left more than 300,000 flyers during PY2014.

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

Customer Contact Personnel:

Customer Contact Center (CCC): Customers are informed by the IVR system about the CARE Program when they call to request new service or payment arrangements. Customers can request a CARE application from a Customer Service Representative (CSR), the IVR, or from SoCalGas' website.

Bilingual Employees: The CCC, CARE Customer Support Center, and most company business offices continued to be staffed with bilingual (English and Spanish) representatives. Vietnamese, Korean, Mandarin, and Cantonese telephone lines are staffed from 8:00 am to 5:00 pm, Monday through Friday, in the CCC. Deaf and hearing impaired customers may contact the CCC through its TTY/TDD equipment 24 hours a day, seven days a week. Additionally, SoCalGas' call center is equipped to provide service in 170 languages through the *Language*

Line Service, a third-party translation service which is available to customers 24 hours a day, seven days a week. For hearing impaired customers, a toll-free number is also provided.

Branch Payment Offices (BPO): English and Spanish CARE applications and program information brochures are available in all BPOs, and the CARE Program is promoted during every transaction. Furthermore, English and Spanish CARE posters that are complete with program guidelines and helpful information are on display in each BPO. These posters are revised as program information and income guidelines change.

Community Events: During PY2014, SoCalGas personnel participated in general and low-income specific community events. The goal of each event was to promote awareness of and participation in Customer Assistance Programs. SoCalGas has been striving to use events and event sponsorships as leveraging points for further outreach in communities, and opportunities to work with other organizations so that residents and customers get good value out of attending. The events included (partial list):

- Tet Festival to promote outreach in the Vietnamese communities of Orange County.
- A March Santa Margarita “Energy Challenge,” a joint event with PG&E in San Luis Obispo (a similar event in Oceano was held later in March).
- Cambodian Khmer New Year celebration provided information to approximately 1,000 attendees who were monolingual Cambodian speakers.
- Utility Bill Fairs in collaboration with EveryoneOn, a non-profit organization focused on helping low-income residents to find low-cost and no-cost broadband, to show the connection between low-cost broadband and accessing online information on the CARE and ESA Programs.

- Summer Lunch programs for farmworkers during lunch breaks (*Cuadrilla de la Semana*) through Radio Campesina.
- “Classrooms” of the Month sponsored by Radio Campesina.
- Quarterly Utility Bill Outreach for persons with disabilities, sponsored through the Westside Center for Independent Living.
- The Fall Event also invited Telscape (a cell phone provider for low-income customers), to inform customers how to save money on their utility bill and sign up for the Lifeline rate for mobile phone.
- Parent Night at the Academy for Science and Social Policy, a magnet high school in Lincoln Heights, where monolingual Spanish speaking parents learned about the connection between low-cost broadband, accessing online information on the CARE and ESA programs, and using the school’s online portal.
- St. Cecilia, Mariachi Festival in Boyle Heights.

Third-Party Outreach: In order to improve its efforts to communicate with hard-to-reach customers, SoCalGas has contracted with a vendor to perform door-to-door outreach.

Community-Based Organizations (CBOs): In PY2014, SoCalGas continued its grassroots outreach efforts. The primary driver has been to establish relationships with faith-based organizations and CBOs in order to enroll hard-to-reach customers.

Customer Assistance Programs and service information continue to be added to the growing California 211 information and referral network. 211 provides social and support services to assist those in need, mainly low-income residents. SoCalGas works very closely with 211 LA County, so that CARE is a key component of the operator’s assessment of the caller’s needs. During PY2014,

SoCalGas continued working with these organizations, but also added several key partners to expand awareness.

- In order to strengthen outreach with customers eligible for CalFresh, SoCalGas continued to work closely with FOOD Share, the regional food bank for Ventura County. FOOD Share conducts ongoing grassroots CalFresh program outreach and includes the CARE Program awareness as part of its efforts.
- SoCalGas continued working with Centro Latino for Literacy, an organization that provides language instruction in one of the poorest neighborhoods in Los Angeles where adult students learn about the CARE Program.
- SoCalGas also sponsors computer education events that are conducted by the Los Angeles Opportunities Industrialization Centers. These “computer boot camps” provide computers and computer education for low-income residents of Los Angeles at designated branches of the Los Angeles Public Library. CARE information is provided to all participants.
- Additionally, SoCalGas worked with St Vincent Meals on Wheels to provide CARE information to seniors who are homebound. Once a month, the organization includes CARE applications and/or general information with the daily meals.
- In order to expand awareness of customer assistance programs in the underserved areas of Santa Barbara County, SoCalGas initiated relationships with two community-based organizations. The Santa Barbara County Food Bank conducts ongoing CalFresh outreach in the county. Because participation in CalFresh allows customer enrollment in the CARE and ESA Programs through categorical eligibility, SoCalGas began working with the food bank. (This relationship is similar to the relationship with FOOD Share in Ventura County, described above.) In addition, SoCalGas began working with Unity Shoppe, a CBO in Santa Barbara County. The organization serves low-income families, children, seniors, and persons with disabilities. Since each

person served undergoes an assessment process by the organization, it is an opportunity to increase awareness of the SoCalGas low-income programs.

- In the 3rd and 4th quarters of PY2014, SoCalGas launched an integrated campaign that focused on coordinated outreach in Boyle Heights and adjacent communities “east of the LA River.” SoCalGas coordinated event sponsorships (for example, CicLAVia in October & the Mariachi Festival in November) with low-income and energy efficiency program awareness. Preceding the Mariachi Festival, SoCalGas mailed out bilingual (English/Spanish) postcards to residents in the community. Civic leaders were informed of SoCalGas’ participation. A bilingual ESA Program contractor attended the event. SoCalGas deepened its relationship with the students, parents, and staff of the local high school to reinforce awareness of SoCalGas low-income programs. SoCalGas plans to refine and continue such coordinated event and grassroots awareness whenever possible.

Capitation Contractors: SoCalGas worked with 40 different CBOs and outreach agencies to enroll eligible non-participating customers in the CARE Program during PY2014. These “CARE Capitation Contractors” are located throughout the SoCalGas service area and employ various types of outreach strategies, such as local community event participation, walk-in enrollment, and program material distribution to enroll customers.

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

Mass media and grassroots partnerships maintain and enhance the awareness of the CARE Program. The largest source of enrollments came from paper applications that customers requested from SoCalGas and then subsequently returned. Many forms of outreach and advertising may go into the decision a customer makes when requesting a CARE application from SoCalGas, which reinforces SoCalGas’ use of awareness channels, such as mass media and

outreach with CBOs. Direct mail was the second largest source of enrollments. One advantage of direct mail *vis à vis* mass media is that direct mail includes a specific source code on the returned application that allows CARE operations to track the enrollment source. Even with direct mail, the reinforcement provided by other awareness channels may play an important role. Thus, SoCalGas tracks individual channels where possible, but also views various methods as interconnected and mutually reinforcing. The third largest source of enrollments came through the SoCalGas.com Website. Door-to-door canvassing represented the fourth largest channel for enrollments in the CARE program.

Technology continues to play a large role in awareness and outreach. Social media sites such as Facebook generate significant “click-throughs.” Web enrollment and email-prompted Web enrollment are already significant contributors to participation. The digital component drove 16,000 visits to the SoCalGas website. Of the 16,000 visits, Facebook ads drove over 5,200 visits to the website.

SoCalGas plans to maintain traditional channels, fine tune the effectiveness of traditional channels, and continue to pursue technological approaches.

The primary outreach tactics used during PY2014 are listed below:

Bill Inserts: SoCalGas sent out over 6 million CARE self-mailer bill inserts during PY2014. As discussed in section 2.4.1, SoCalGas sent out two residential bill inserts (approximately 3 million each in April and June). In September, SoCalGas also sent out a bill insert to 250,000 commercial customers. Bill inserts continue to be a significant, but declining channel for enrollments. Approximately 8,300 bill insert, self-mailer applications were returned in PY2014, resulting in approximately 5,200 customers enrolled into the CARE program.

Capitation Program: See Section 2.4.1, above. As described there, SoCalGas worked with 40 different CBOs and outreach agencies to enroll eligible non-participating customers in the CARE Program during PY2014. There were 22 CARE capitation contractors that enrolled customers in PY2014. CARE capitation contractors are located throughout the SoCalGas service area and employ various types of outreach strategies to enroll customers, such as local community event participation, walk-in enrollment and program material distribution.

Direct Mail: SoCalGas' efforts to target and reach relatively large numbers of eligible customers not currently enrolled in the CARE Program are often accomplished through the direct mailing of CARE applications, in which all of the letters and applications are in English and Spanish. These customers are selected based on an adjustable eligibility profile that shows them to live in high gap or high eligibility and low penetration areas. During PY2014, SoCalGas sent out approximately 1.6 million direct mail pieces. SoCalGas received 77,000 direct mail applications, and 49,400 customers were enrolled in the CARE Program.

Third Party Door-to-Door Outreach: Developed to perform outreach to SoCalGas' hardest-to-reach low-income customers, this proactive door-to-door enrollment tactic continues to be a key component of SoCalGas' marketing strategy. These outreach contractors produce high volume enrollments from a hands-on customer approach. During PY2014, approximately 36,000 customers were enrolled by this method.

Community-Based Organizations/Faith-Based Organizations:

SoCalGas has been increasing its collaboration with community-based and faith-based organizations. These organizations are crucial parts of our relationships to enhance awareness and trust among all customers, especially hard-to-reach customers. The organizations that SoCalGas works with have a deep and

ongoing relationship with their communities. For example, some CBOs include Radio Campesina among farmworkers, Saint Barnabas Senior Services and St. Vincent Meals on Wheels among seniors, FOOD Share among CalFresh recipients in Ventura County, the Westside Center for Independent Living for persons with disabilities who are trying to live independently in homes or apartments, and Centro Latino for Literacy among non-literate residents in the Pico Union neighborhood of Los Angeles.

Web Based Outreach: Web based outreach consists of program promotion through e-newsletters, web links, e-mail blast campaigns, social media networks and direct internet access. In addition, CARE continues to be one of the most-visited pages and one of the most “searched” keywords on the SoCalGas website. A digital and social media channel have become basic component of mass media awareness campaigns. In PY2014, SoCalGas received 69,600 applications through the internet, and 46,100 were subsequently approved.

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

Although direct mail is an effective form of enrollment and will continue in to PY2015, it is challenging to optimize the direct mail campaigns. Postage continues to be the primary cost of a direct mail campaign, and these costs typically increase annually. Because of the success of past efforts, one cannot blanket a particular zip code or county and hope for cost-effective returns. SoCalGas continues to fine tune its targeting, but the issue of literacy continues to be raised anecdotally (through in-person calling campaigns and from varieties of CBOs that provide feedback on their communities). Thus, even a perfectly targeted direct mail piece will not guarantee a successful return. SoCalGas has noted this and will look for ways to send out less text-heavy communication. As a partial mitigation of literacy challenges, SoCalGas has begun to (and will continue to) coordinate direct mail campaigns with door-to-door canvassing. The direct mail piece provides context for the canvassers, and the canvassers can

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

Literacy challenges and general hardship may contribute to customers who fail to respond to a request to recertify their eligibility. In PY2014, SoCalGas added more than 300,000 CARE enrollments. During that same period, more than 170,000 customers failed to recertify. Timely recertification is an ongoing challenge. During PY 2014, SoCalGas addressed this problem by sending out a second reminder letter to customers, and accompanying those letters with automated phone calls. To address the customers who nevertheless fail to reply, SoCalGas initiated a campaign to send letters to those customers that had failed to recertify. SoCalGas tested the effectiveness of several different "messages," and based on those results, letters have been modified. SoCalGas will continue to test its messages. In PY 2015, SoCalGas plans to deploy letters that are less text heavy.

SoCalGas is also working increasingly with its partners in the community to use existing computers as opportunities to guide customers in the enrollment process. The introduction of digital literacy has been a persistent theme during PY2014. Online sign ups played a key role in several outreach events, and this approach is expected to continue and increase in PY2015.

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

Customers who do not participate in SoCalGas' CARE program, but are enrolled in other utility (e.g., electricity provider) CARE Programs, are automatically eligible for SoCalGas' CARE Program. To ensure that eligible customers in overlapping territories receive all discounts they are eligible for, SoCalGas

exchanges its CARE customer data with SCE and SDG&E. In PY2014, SoCalGas exchanged CARE customer data with SCE and SDG&E. SoCalGas customers enrolled through data-sharing are mailed a letter notifying them of the enrollment, and are provided the opportunity to opt-out of SoCalGas' program if they choose.

SoCalGas continued to electronically exchange new CARE customer enrollment data on a weekly basis with SCE, a process established in 2001. In PY2014, SoCalGas received 236,906 customer records from SCE and enrolled almost 55,996 SCE CARE customers into SoCalGas' CARE Program. Customers not enrolled were either already participating in SoCalGas' CARE Program or were not SoCalGas customers.

During PY2014, SoCalGas conducted three data exchanges with SDG&E. The exchanges resulted in 559 SDG&E CARE participants being added to SoCalGas' CARE Program.

Joint Utility Program Manager's Meeting:

In PY2014, SoCalGas, SCE, PG&E, SDG&E, South West Gas and Sacramento Municipal Utility District (SMUD) continued to meet periodically to discuss CARE outreach efforts and program issues.

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

Leveraging with other assistance programs is one of the most cost effective ways for SoCalGas to increase customer participation in the CARE Program. Therefore, customer information obtained from SoCalGas' ESA Program and Gas Assistance Fund (GAF) Programs, along with LIHEAP, is used for CARE enrollment, recertification, and verification purposes.

In PY2014, SoCalGas continued cross-referencing customers who receive ESA Program benefits. Customers who are receive benefits from the ESA Program are automatically enrolled for the CARE discount and exempt from PEV if their eligibility has been verified by the ESA Program. In PY2014, SoCalGas automatically enrolled 19,855 ESA Program customers in CARE.

SoCalGas' GAF Program provides a one-time bill assistance amount of up to \$100 on a qualified customer's winter natural gas bill. The annual, one-time bill payment assistance is available to eligible customers on a first-come, first-served basis. The program typically begins in February and continues through the end of May, or until funds are depleted.

Because GAF Program has the same income eligibility guidelines as CARE, SoCalGas' GAF customer data and CARE customer data are interfaced. Customers participating in the GAF Program, but not in the CARE Program, are automatically enrolled in CARE. Additionally, because GAF customers provide proof of income when applying, customers approved for GAF are not subject to CARE's PEV process. Finally, CARE customers who are scheduled for recertification and who are approved for GAF assistance are not asked to recertify their CARE eligibility again until the next two year recertification cycle has lapsed. This process helps reduce barriers to participation and assists in retaining qualified customers.

Through leveraging efforts with SoCalGas' GAF program, during PY2014, SoCalGas enrolled 890 new participants in its CARE Program. In PY2009, SoCalGas requested CPUC authorization in Resolution E-4251 to utilize \$3 million in Ratepayer funds, on a one-time basis, to assist customers having financial difficulty. This request was approved in Advice Letter 4168 in December 2010. The distribution of the ratepayer portion of GAF funds was spread over a three-

year period, and the remaining \$32,396 of the funds was used in PY2014. Including SoCalGas shareholder funded amounts, in PY2014 the GAF program provided approximately \$775,000 in customer assistance.

PY2014	Shareholder Funded Distribution	Ratepayer Funded distribution	Total YTD
Beginning Balance	\$276,791	\$32,396	\$309,187
Customer & Shareholder Contributions	\$470,720	\$0	\$470,720
Total Funds Available	\$747,511	\$32,396	\$779,907
Administrative Fees ¹	\$40,482	\$0 ⁽¹⁾	\$40,482
Gas Assistance Payments			\$733,596
Remaining Balance	\$5,829	\$0 ⁽¹⁾	\$5,829
Customers Assisted			8,184
Average Assistance			\$98

¹ Admin fees are paid in the month funds are wired to United Way for use. There were no Admin Fees for the Ratepayer Funds in PY2014 because the fees were paid in PY2013.

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

CARE Outreach collaborates with the ESA Program at events. Outreach representatives are able to discuss multiple ways to save on energy bills such as the CARE discount, and weatherization and/or repairs for residences. In addition, SoCalGas often coordinates with SCE at events. Even though there are separate booths, the two utilities are positioned close to each other and the customer is able to focus on “utility bill” assistance. Outreach workers are able to assist in directing customers to each booth. The outreach events at the Westside Center for Independent Living were an example of this approach.

Additionally, CARE outreach also collaborates extensively with CalFresh program outreach. For efforts taken to reach and coordinate the CARE Program to eligible customers, outreach occurs at events such as at faith-based workshops

(e.g., Catholic Charities Orange County) and with food banks (e.g., FOOD Share in Ventura County).

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

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

For PY2014, SoCalGas did not receive low-income customer information or requests for the CARE discount information from CSD. However, SoCalGas received LIHEAP payment information from CSD, which was used to apply LIHEAP payment assistance to a low-income customer's bill.

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

SoCalGas continued the operation of the CARE Program using cost-effective and efficient channels. In PY2014, SoCalGas approved over 28,200 customer applications from its website, which maintained program cost-effectiveness and

efficiency. SoCalGas will continue to promote and support CARE enrollment and recertification through the SoCalGas website.

SoCalGas processed nearly 620,000 mailed applications (system generated, direct mail, bill inserts) in PY2014 via document scanning and data validations, with approximately 10.5 percent of those requiring manual data entry. SoCalGas continues to scan and electronically maintain all customer-returned documents for ease of processing and retrieval on its network. This improves program delivery when customers call with CARE inquiries and issues. The CARE processing staff can easily retrieve the customer application and respond accordingly.

Pending Customer Accounts:In SoCalGas' Customer Information System (CIS), only active bill accounts can be approved for CARE; a customer with a new account in pending turn-on status cannot be CARE approved. A decision was made to enhance CIS to allow a new CARE *pending* status on accounts that are pending turn-on, and business requirements were presented to IT during the last quarter of 2013. Discussions between CARE and IT continued well into PY2014 until both departments agreed on the necessary changes and what should be reflected in CIS. Batch, online and IVR components of the Pending Turn-on enhancement were finally created at the end of 2014. In addition to the complexity of this new CARE status and required changes to CIS, other items of high importance which contributed to the delay in IT's build of the *Pending Turn-on Enhancement Project* were the implementation of the CARE Probability Model for Soft Approvals; inbound Self-certification and Recertification via the IVR; the second Recertification notice; outbound PEV and Recertification reminders via the IVR; and improved visibility of CARE applications by modifying the 256 Colors to 256 Grayscale in Extream.

Set for implementation in 2015, the pending CARE application will be automatically processed without manual intervention once the account becomes active, and a new CARE enrollment (or denial) will be the end result in CIS. The new process will eliminate the need for the CARE processing staff to solicit assistance from SoCalGas' Billing Department which currently monitors pending turn-on accounts, and has the responsibility to manually approve CARE once the accounts become active. The new process will expedite processing of CARE applications, and allow customers to receive the CARE discount as of their initial bill. SoCalGas continuously strives to enroll all eligible applicants in a timely manner, which adds to SoCalGas' exceptional customer service.

PEV-Terminated Customers: In an effort to retain CARE customers, beginning January 2014, SoCalGas implemented the practice of out-bound calls to landline telephones to customers who were recently mailed a PEV request. The message alerts the customer that it is time to verify eligibility for CARE and to be aware that a request will arrive within a few days. The message also describes the consequences of not returning the completed application – removal from the CARE program and termination of the 20 percent discount. If the call is answered, the customer has the option of hearing the message in either English or Spanish. If the message is left on the customer's answering machine, the information is delivered in both English and Spanish. However, Federal Communication Commission rulings disallow SoCalGas to legally call cellular telephones, and based on SoCalGas' customer data, only 65 percent of customers have landline phones as their contact number. Further data shows that less than 20 percent of the customers called had actually listened to the complete PEV message. Plus, due to the existence of caller ID information, customers can choose to disregard a call from SoCalGas, altogether. The effectiveness of the out-bound call strategy is not yet evident.

Within twenty-four months from PEV termination, customers must submit proof of income or proof of participation in a specific assistance program to become re-enrolled. When twenty-four months from PEV termination have lapsed, customers can get back on the program by simply completing a self-cert application.

In PY2014, plans began for automatic mailing of a 2nd PEV application to customers who have not responded to their first request (within 45 days). The 2nd notice will begin third quarter 2015.

Bill Messages: Customers who do not respond to a PEV request within 45 days receive a bill message reminding them to send their application and documents proving their eligibility. To improve communication with its customers, SoCalGas recognized the need to create the bill message in Spanish, as well as in English. In January 2014, the dual message was implemented and customers began receiving the reminder message on their bills in both English and Spanish.

2.5 Processing Care Applications

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

SoCalGas' recertifies sub-metered tenants of master-metered customers every two years, with the exception of customers on a fixed-income. SoCalGas recognized that the annual earnings of customers on a fixed-income does not fluctuate significantly from year to year, and requiring them to recertify every two years was an unnecessary burden. In PY2008, as authorized by the CPUC³³, SoCalGas implemented a four year recertification period for customers receiving Social Security, pension, SSI, Social Security Disability (SSD), State Supplemental Program (SSP), and/or Medi-Cal benefits.

³³ D.06-12-038.

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

Several options for completing the recertification process are listed on the recertification application: Call the toll-free AVM number, apply directly on the website at SoCalGas.com, mail back in the postage paid envelope, or directly fax to the CARE Program staff. Recertification requires the tenant to provide the number of household occupants, annual income, or participation in a public assistance program.

Applications received via U.S. mail are opened, scanned, and validated for processing efficiency. Tenants are allowed 90 days to respond to the recertification request. If the recertification is received and approved after the 90 day time-frame, the tenant is re-enrolled in CARE. Annually, each sub-metered facility is mailed a complete listing of its CARE tenants. Additionally, the monthly *Add & Delete* report is mailed to each sub-metered facility notifying the facility of any tenants who were recently added to CARE or terminated from the program. This ensures proper recordkeeping and appropriate billing of the 20% discount for each CARE tenant.

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

SoCalGas does not contract with third parties to conduct certification, recertification and/or verification on its behalf. SoCalGas processes and

approves all CARE enrollment applications, recertification forms, and verification requests internally. Additionally, SoCalGas utilizes LIHEAP, ESA Program, and GAF participant information to enroll, recertify, and verify CARE eligibility. SoCalGas also utilizes SDG&E and SCE CARE participant information to enroll customers.

In PY2014, SoCalGas contracted with 40 CBOs and one third party outreach contractor to help eligible non-participating customers sign up for the CARE Program. The non-profit CARE Capitation CBOs employed a “one-stop-shop” approach by helping their clients complete a CARE application, while also assisting the customers in enrolling in other programs they might be eligible for.

SoCalGas’ third party CARE outreach contractor employed a variety of outreach strategies, such as door-to-door solicitation, local community event participation, and program material distribution to help customers apply for CARE. Many of the customers targeted by the third party CARE contractor do not respond to traditional forms of outreach, nor visit CBO facilities, and are much more receptive to door-to-door canvassing efforts.

During PY2014, the number of customers enrolled in CARE by SoCalGas’ CARE Capitation CBOs was 22. Over 37,500 new enrollments were derived from CARE’s third party contractor’s efforts.

2.6 Program Management

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

SoCalGas’ CARE Program did not experience any serious issues or events that significantly affected program management during PY2014.

2.7 Pilots

2.7.1 CHANGES Pilot Program

In D.12-12-011 (CHANGES Decision) the Commission approved the continued funding for the CHANGES Pilot Program³⁴ through the CARE Program budget for the remainder of the 2012-2014 program cycle or until alternate or complementary funding can be put into place, whichever is sooner. The CHANGES Decision also directed the utilities to work with the Commission's Consumer Service and Information Decision (CSID), the Pilot Program's contractor and community-based organizations, as necessary, to develop pilot program success criteria and to facilitate and improve the tracking, monitoring and oversight of the CHANGES Pilot Program efforts consistent with the directives provided in the CHANGES Decision and D.12-08-044. The overall objectives of the collaborative efforts are to: 1) identify and eliminate unnecessarily duplicative efforts between the CARE Program's marketing, education and outreach activities and the CHANGES Pilot Program's activities; 2) improve the utilities marketing, outreach and education activities, where appropriate; and, 3) ensure effectiveness of the CHANGES activities, relating to the CARE Program, in furthering the CARE Program objectives.

Pacific Gas and Electric Company, San Diego Gas & Electric Company, Southern California Edison and Southern California Gas Company (Joint Utilities), received data throughout 2014 and included it in monthly reports due on the 21st of each month. In August 2014, D.14-08-030 extended the pilot and continued funding through 2015 to allow time for the CPUC to decide if the pilot should become an ongoing program.

³⁴ On November 19, 2010, the Commission approved Resolution CSID-004 and approved the CHANGES Pilot Program and authorized CARE funding for the one-year Pilot Program for one-year. On November 10, 2011, the Commission issued Resolution CSID-005 which authorized continued CARE funding for the CHANGES Pilot Program. CSID did not authorize funding for the Pilot beyond December 31, 2012.

3. CARE EXPANSION PROGRAM

3.1 Participant Information

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

See CARE Table 12 in the attachments.

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

There were 22,216 residents in the non-residential CARE Expansion Program facilities. There were 470 primary facilities with 704 associated satellite facilities participating in the CARE Expansion Program at PY2014 year-end.

3.2 Usage Information

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

See CARE Table 12 in the attachments.

3.3 Program Costs

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

For PY2014, SoCalGas incurred \$4,600 in outreach expenses for the CARE Expansion Program bill insert. By staying within the overall envelope weight, this bill insert did not incur incremental postage costs. Compared to the residential bill inserts (approximately 3 million per insertion), the 250,000 self-mailer applications that are sent out in this campaign are comparatively modest. Because of the low volume, SoCalGas did not track administrative labor costs for new CARE expansion applications received during PY2014.

3.3.1.1 Discount Information.

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

The average annual discount received per participating CARE residential facility in PY2014 was \$70.96.³⁵

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

The average annual discount received per participating CARE Expansion Program facility in PY2014 was \$424.15.³⁶

3.4 Outreach

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

Annually, SoCalGas sends a bill insert to commercial customers informing them of the Non-Profit Group Living Rate. In addition, SoCalGas worked with its Public Affairs personnel in rural counties to promote program awareness for low-income farm workers. To enhance outreach in rural counties, SoCalGas continues to work with Radio Campesina in Visalia and Bakersfield to reach farm workers. During PY2014, Radio Campesina provided an opportunity for SoCalGas to participate in events, such as *Cuadrilla De La Semana*, which are weekly visits to farmworkers in their workplaces. Lunch, musical entertainment, and information from SoCalGas regarding the CARE Program are part of the lunch breaks. SoCalGas also advertises the CARE Program with 30 second, Spanish language radio spots, and participates in Spanish-language interview shows.

³⁵ Average annual discount is dependent on the sales and transport gas revenue as well as the number of CARE customers by climate zone.

³⁶ Average annual discount is dependent on the sales and transport gas revenue as well as the number of CARE customers by climate zone.

3.4.2 Discuss each of the following: the expansion program outreach

SoCalGas used a variety of channels to increase awareness of the CARE Program among agricultural workers and those living in commercial facilities. During September, SoCalGas mailed approximately 300,000 bill inserts to commercial facilities (non-profit group living facilities and migrant worker housing). In past years, SoCalGas has leveraged the relationships of its Public Affairs personnel in developing grassroots relationships with agricultural and migrant workers. During PY2014, SoCalGas continued to work closely with Radio Campesina, which has Spanish language radio stations in both Visalia and Bakersfield. SoCalGas increased its collaboration during PY2014 by participating in several “Classroom of the Month” events that allow SoCalGas to promote awareness of SoCalGas to school children, who can be primary cultural navigators in mono-lingual Spanish speaking homes.

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

By December 2014, SoCalGas had reported strong eligibility in the “rural eligible” customers of Kern (97%), Kings (98%), and Tulare (97%). As has been discussed above, SoCalGas’s presence in these rural communities is ongoing and continually disseminated and reinforced by trusted community organizations. These relationships are planned to continue and increase in PY2015. Certain tactics, such as door-to-door, are non-existent in the rural communities as they are not as densely populated, but direct mail did result in significant enrollments in these three counties (Imperial County, however, represented an anomaly in that 17% of the new enrollments in this rural county came in through door-to-door outreach. Therefore, SoCalGas may choose to emphasize certain tactics in certain areas, but has found that it is unwise to completely exclude a tactic). Because hard-to-reach customers have challenges with language and/or comfort with institutions, SoCalGas has continued its relationship with Radio Campesina. In addition, in PY2014, the CCC continued to be

an effective outreach method for the SoCalGas CARE Expansion Program's non-residential facilities. Customers that call in to make payment arrangements, have their service established, or request service activation talk with CSRs who present the CARE Program to them and respond to questions. Social service networks continue to be another valuable communication medium to promote CARE Program information to CARE expansion customers.

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

There was no facility data shared during PY2014.

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

SoCalGas is not aware of barriers to participation in PY2014 requiring adjustments in PY2015. Applications were processed the same day they were received. Incomplete applications were followed-up with a phone call or correspondence to the customer, resulting in CARE approval of qualified accounts.

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

SoCalGas considers the current processing of CARE Expansion Program applications to be cost-effective. Applications are processed the same day they are received. The majority of applicants include the necessary qualifying documentation and no further follow-up is needed.

Occasionally, a follow-up phone call is necessary. SoCalGas recertifies these accounts every two years. In order for the process to run more

efficiently, it is recommended that all accounts are recertified at the same time every two years. Correspondence containing a recertification application, instruction letter, and postage paid envelope is mailed to the facilities due to recertify. The facilities are familiar with this routine and submit what is asked of them. Additionally, the CCC and Billing Department notify the CARE Department of new Expansion Program accounts, both non-profit and agricultural group living facilities. A CARE application is proactively mailed to these accounts.

3.5 Program Management

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

SoCalGas' CARE Program did not experience any issues or events that significantly affected program management during PY2014

4. FUND SHIFTING

4.1.1 Report Energy Savings Assistance Program fund shifting activity that falls within rules laid out in Section 20.1 of D. 08-11-031

See ESA Table 12.

4.1.2 Report CARE fund shifting activity that falls within rules laid out in Section 20.1 of D. 08-11-031

See CARE Table 1.

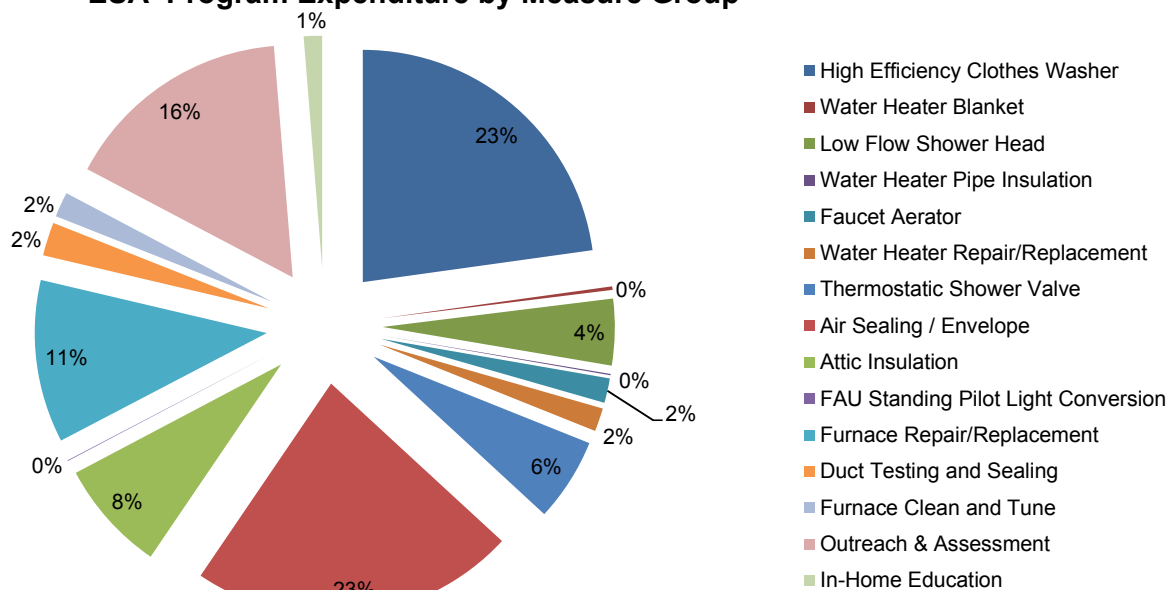
4.1.3 Was there any Energy Savings Assistance Programs or CARE fund shifting activity that occurred that falls OUTSIDE the rules laid out in Section 20.1 of D. 08-11-031?

All fund shifting activity performed in PY2014 is in compliance with fund shifting rules as laid out in D.12-08-044.

	A	B	C	D
1	Energy Savings Assistance Program and CARE Program			
2	SOUTHERN CALIFORNIA GAS COMPANY			
3	2014 Summary Highlights			
4				
5				
6	ESA Program			
7				
8	2014 Energy Savings Assistance Program Summary			
9	2014	Authorized / Planning Assumptions	Actual	%
10	Budget	\$132,417,191	\$93,781,355	71%
11	Homes Treated	136,836	92,967	68%
12	kWh Saved	N/A	N/A	N/A
13	kW Demand Reduced	N/A	N/A	N/A
14	Therms Saved	2,417,480	3,144,894	130%
15				
16				
17	CARE Program			
18				
19	2014 CARE Summary			
20	2014	Authorized Budget	Actual	%
21	Administrative Expenses	\$16,364,513	\$8,021,603	49%
22	Subsidies	\$126,787,458	\$106,731,701	84%
23	Service Establishment Charge	\$4,354,719	\$2,757,107	63%
24	Total Program Costs and Discounts	\$147,506,690	\$117,510,411	80%
25	2014 CARE New Enrollments	Automatically Enrolled via Data Sharing, ESA Participation, etc	Self Certified as Categorically Eligible	Self Certified as Income Eligible
26	Method	92,456	153,398	86,287
27	2014 CARE Penetration	Estimated Eligible Participants	Participants	Penetration Rate
28	Total Enrolled ¹	1,898,302	1,568,011	83%

¹ December 2014 results from the SoCalGas Monthly Report.

ESA Program Expenditure by Measure Group



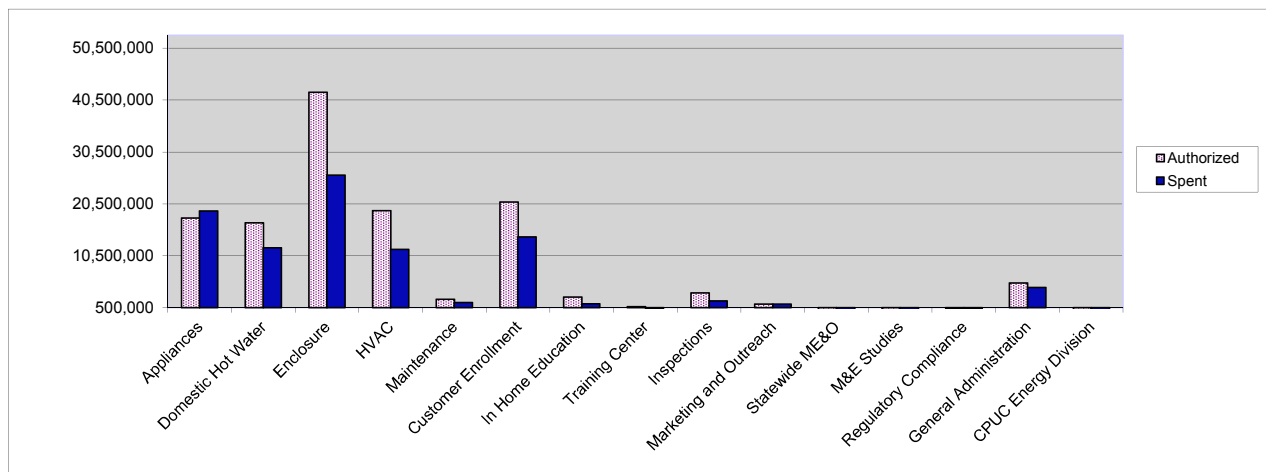
	A	B	C	D	E	F	G	H	I	J
	PY 2014 Energy Savings Assistance Program Annual Report ESA Program Table 1 ESA Program Overall Program Expenses SOUTHERN CALIFORNIA GAS COMPANY									
1										
2		2014 Authorized Budget ¹			2014 Annual Expenses			% of Budget Spent YTD		
3	ESA Program:	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
4	Energy Efficiency									
5	Appliances ²		\$ 17,785,151	\$ 17,785,151		\$ 19,138,127	\$ 19,138,127		108%	108%
6	Domestic Hot Water		\$ 16,843,374	\$ 16,843,374		\$ 12,016,545	\$ 12,016,545		71%	71%
7	Enclosure		\$ 41,983,756	\$ 41,983,756		\$ 26,035,602	\$ 26,035,602		62%	62%
8	HVAC		\$ 19,210,885	\$ 19,210,885		\$ 11,736,654	\$ 11,736,654		61%	61%
9	Maintenance		\$ 2,128,846	\$ 2,128,846		\$ 1,477,021	\$ 1,477,021		69%	69%
10	Lighting		\$ -	\$ -		\$ -	\$ -			
11	Miscellaneous		\$ -	\$ -		\$ -	\$ -			
12	Customer Enrollment		\$ 20,834,354	\$ 20,834,354		\$ 14,146,438	\$ 14,146,438		68%	68%
13	In Home Education		\$ 2,531,192	\$ 2,531,192		\$ 1,243,521	\$ 1,243,521		49%	49%
14	Pilot			\$ -		\$ -	\$ -			
15	Energy Efficiency TOTAL		\$ 121,317,558	\$ 121,317,558		\$ 85,793,909	\$ 85,793,909		71%	71%
16										
17	Training Center		\$ 681,105	\$ 681,105		\$ 331,476	\$ 331,476		49%	49%
18	Inspections		\$ 3,361,051	\$ 3,361,051		\$ 1,799,868	\$ 1,799,868		54%	54%
19	Marketing and Outreach		\$ 1,198,436	\$ 1,198,436		\$ 1,187,445	\$ 1,187,445		99%	99%
20	Statewide Marketing Education and Outreach		\$ 100,000	\$ 100,000		\$ -	\$ -		0%	0%
21	Measurement and Evaluation Studies ³		\$ 91,667	\$ 91,667		\$ (1,885)	\$ (1,885)		-2%	-2%
22	Regulatory Compliance		\$ 295,333	\$ 295,333		\$ 248,650	\$ 248,650		84%	84%
23	General Administration		\$ 5,286,041	\$ 5,286,041		\$ 4,414,388	\$ 4,414,388		84%	84%
24	CPUC Energy Division		\$ 86,000	\$ 86,000		\$ 7,505	\$ 7,505		9%	9%
25										
26	TOTAL PROGRAM COSTS		\$ 132,417,191	\$ 132,417,191		\$ 93,781,355	\$ 93,781,355		71%	71%
27	Funded Outside of ESA Program Budget									
28	Indirect Costs					\$ 3,025,630	\$ 3,025,630			
29	NGAT Costs					\$ 2,108,053	\$ 2,108,053			

¹ Pursuant to D.14-08-030, budgets reflect the Phase II Decision authorized 2014 budget amounts and does not include funds shifted from previous years and/or prior program cycles, and includes \$1,046,575 in the Appliance category related to Phase II authorized Carry Back Funding line item amount allocated as such.

² Funds shifted to PY 2014 in Appliances from PY 2012 unspent funds. (See ESA Program Table 12 - Fund Shifting).

³ Actual credit balance in M&E of (\$1,884.93) due to M&E over-accrual in 2013 where actual payments made in 2014 were less than accrual estimate.

Bar Chart 1 - Total Spent vs. Authorized by Category



	A	B	C	D	E	F	G	H
	PY 2014 Energy Savings Assistance Program Annual Report ESA Program Table 2 ESA Program Expenses and Energy Savings by Measures Installed SOUTHERN CALIFORNIA GAS COMPANY							
1								
2	PY Completed & Expensed Installations							
3	Measures	Units	Quantity Installed	kWh (Annual)	kW (Annual)	Therms ¹ (Annual)	Expenses (\$) ²	% of Expenditure
4	Appliances							
5	High Efficiency Clothes Washer	Each	26,036			710,783	\$19,519,790.00	22.81%
6	Refrigerators	Each						
7	Microwaves	Each						
8	Domestic Hot Water							
9	Water Heater Blanket	Home	3,529			16,368	\$195,911.71	0.23%
10	Low Flow Shower Head	Home	87,568			386,106	\$3,940,857.38	4.61%
11	Water Heater Pipe Insulation	Home	3,127			9,355	\$71,371.97	0.08%
12	Faucet Aerator	Home	84,768			121,941	\$1,469,411.24	1.72%
13	Water Heater Repair/Replacement	Each	1,148			-	\$1,384,029.77	1.62%
14	Thermostatic Shower Valve	Each	111,822			1,520,779	\$4,955,063.00	5.79%
15	Enclosure							
16	Air Sealing / Envelope	Home	73,397			268,590	\$19,372,338.74	22.64%
17	Attic Insulation	Home	5,658			41,551	\$6,664,375.36	7.79%
18	HVAC							
19	FAU Standing Pilot Light Conversion	Each	137			5,754	\$45,555.65	0.05%
20	Furnace Repair/Replacement	Each	9,213			-	\$9,703,245.92	11.34%
21	Room A/C Replacement	Each						
22	Central A/C Replacement	Each						
23	Heat Pump Replacement	Each						
24	Evaporative Coolers (Replacement)	Each						
25	Evaporative Coolers (Installation)	Each						
26	Duct Testing and Sealing	Home	2,468			-	\$1,981,278.45	2.32%
27	Maintenance							
28	Furnace Clean and Tune	Home	26,670			63,667	\$1,477,021.12	1.73%
29	Central A/C Tune-up	Home						
30	Evaporative Cooler Maintenance	Home						
31	Lighting							
32	Compact Fluorescent Lights (CFLs)	Each						
33	Interior Hard wired CFL fixtures	Each						
34	Exterior Hard wired CFL fixtures	Each						
35	Torchiere	Each						
36	Occupancy Sensor	Each						
37	LED Night Lights	Each						
38	Miscellaneous							
39	Pool Pumps	Each						
40	Smart Power Strips	Each						
41	Pilots							
42		Each						
43		Each						
44	Customer Enrollment							
45	Outreach & Assessment	Home	92,967				\$13,690,426.28	16.00%
46	In-Home Education	Home	88,674				\$1,096,627.50	1.28%
47								
48	Total Savings					3,144,894	\$85,567,304.09	100.00%
49								
50	Homes Weatherized	Home	93,812					
51								
52	Homes Treated							
53	- Single Family Homes Treated	Home	68,030					
54	- Multi-family Homes Treated	Home	18,305					
55	- Mobile Homes Treated	Home	6,632					
56	- Total Number of Homes Treated	Home	92,967					
57	# Eligible Homes to be Treated in 2013	Home	136,836					
58	% OF Homes Treated	%	67.94%					
59	- Total Master-Metered Homes Treated	Home	9,782					
60								
61	¹ 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.							
62	² The Total Savings/Expenditures amount does not include credits, expenses, or required adjustments for this period in various IO's. Additionally, the PY 2014 expenses amount includes \$3,172 paid in lead fees to the contractors for potential customers who were unwilling or unable to participate in the program.							

	A	B	C	D	E	F	G
1	PY 2014 Energy Savings Assistance Program Annual Report ESA Program Table 3 ESA Program Cost-Effectiveness SOUTHERN CALIFORNIA GAS COMPANY						
2		PY - Recorded ¹					
3		Ratio of Benefits Over Costs			Net Benefits; \$ Millions		
4	Program Year	Utility Cost Test	Total Resource Cost Test	Modified Participant Test	Utility Cost Test	Total Resource Cost Test	Modified Participant Test
5	2014	0.39	0.27	0.48	\$ (67,295,329)	\$ (56,725,431)	\$ (49,018,687)
6	2013	0.36	0.24	0.51	(61,706,799)	(72,745,311)	(48,273,402)
7	2012	0.31	0.20	0.52	(55,914,989)	(64,445,167)	(39,917,606)
8	2011	0.27	0.18	0.73	(75,116,741)	(84,544,284)	(28,941,324)
9	2010	0.27	0.18	0.70	(56,410,628)	(63,936,482)	(24,097,023)
10	2009	0.31	0.21	0.67	(33,134,007)	(37,833,117)	(16,208,219)
11	2008	0.28	0.20	0.71	(26,904,944)	(30,069,392)	(10,909,048)
12	2007	0.28	0.20	0.68	(20,985,301)	(23,315,525)	(9,541,175)
13	2006	0.23	0.20	0.90	(21,852,544)	(21,456,113)	(2,798,151)
14	2005	0.20	0.24	0.54	(23,160,759)	(22,005,772)	(13,294,877)
15	2004	0.20	0.19	0.53	(26,138,097)	(26,305,744)	(15,353,305)
16	2003	0.29	0.30	0.63	(24,125,171)	(23,844,044)	(12,519,637)
17							
18	¹ The Modified Participant Test (MPT) and the Utility Cost Test (UCT) include non-energy benefits (NEBs) along with energy savings in the numerator. The MPT was calculated using the Low Income Public Purpose Test (LIPPT) workbook as modified for the PY 2003 LIEE measure cost effectiveness testing (the NEBs model). The UCT was calculated in two stages: first, the NEBs for this ratio were calculated using the NEBs model; second, the avoided cost benefits were calculated using the E3 calculator for energy efficiency cost effectiveness testing. The Total Resource Test (TRC) was calculated using the E3 calculator.						
19	The TRC does not include NEBs.						

	A	B	C	D	E	F	G
1	PY 2014 Energy Savings Assistance Program Annual Report ESA Program Table 4 Detail by Housing Type and Source SOUTHERN CALIFORNIA GAS COMPANY						
2			2014 Energy Savings				
3	Customer	Housing Type	# Homes Treated	(mWh)	MW	(Mth*)	2014 Expenses ¹
4	Gas and Electric Customers						
5	Owners - Total						
6		Single Family					
7		Multi Family					
8		Mobile Homes					
9	Renters - Total						
10		Single Family					
11		Multi Family					
12		Mobile Homes					
13	Electric Customers (only)						
14	Owners - Total						
15		Single Family					
16		Multi Family					
17		Mobile Homes					
18	Renters - Total						
19		Single Family					
20		Multi Family					
21		Mobile Homes					
22	Gas Customers (only)						
23	Owners - Total		52,736			2,097,031	\$ 59,106,638
24		Single Family	46,450			1,917,200	\$54,638,855.58
25		Multi Family	686			15,000	\$462,990.64
26		Mobile Homes	5,600			164,832	\$4,004,792.20
27	Renters - Total		40,231			1,047,863	\$ 26,457,494
28		Single Family	21,580			786,200	\$18,831,400.15
29		Multi Family	17,619			230,888	\$6,990,651.84
30		Mobile Homes	1,032			30,775	\$635,441.69
31							
32	Totals:		92,967			3,144,894	\$ 85,564,132
33							
34	* Thousands of Therms						
35	¹ The Total Savings/Expenditures amount does not include credits, expenses, or required adjustments for this period in various IO's. Additionally, the PY 2014 expenses amount does not include \$3,172 paid in lead fees to the contractors for potential customers who were unwilling or unable to participate in the program.						
36							
37	Penetration History						
38	Year	Homes Treated ¹	Ineligible & Unwilling ²	Estimated Eligible in Current Year ³	Current Year Penetration Rate for Homes Treated		
39	2002	49,464					
40	2003	57,179					
41	2004	54,677					
42	2005	40,523					
43	2006	36,870					
44	2007	44,048					
45	2008	58,773					
46	2009	83,493	3,562				
47	2010	120,358	22,589				
48	2011	161,020	23,765				
49	2012	96,893	20,383	136,836		70.81%	
50	2013	106,948	12,310	136,836		78.16%	
51	2014	92,967	10,029	136,836		67.94%	
52	2015						
53	2016						
54	2017						
55	2018						
56	2019						
57	2020						
58	Total Homes Treated since 2002	1,003,213	92,638				
59							
60	¹ Homes treated since 2002 are reported to track progress toward meeting the 2020 Programmatic Initiative.						
61	² Ineligible & Unwilling - Leads which do not result in a customer enrollment based on one of the following reasons: customer refused; home does not meet minimum measure						
62	³ Based on Attachment F of D.12-08-044.						
63							
64							
65	Year	Utility in Shared Service Territory	Eligible Households in Shared Service Territory	Eligible households treated by both utilities in shared service territory			
66	2014	SDG&E	18,959	48			
67	2014	PG&E	92,899	2,536			
68	2014	SCE	1,231,361	31,224			

	A	B	C	D	E	F	G
1	PY 2014 Energy Savings Assistance Program Annual Report ESA Program Table 5 ESA Program Direct Purchases & Installation Contractors SOUTHERN CALIFORNIA GAS COMPANY						
2	Contractor	County ¹	Contractor Type (Check one or more if applicable)				2014 Annual Expenditures ²
3			Private	CBO	WMDVBE	LIHEAP	
4	ADVANCED CONTRACTING SERVICES INC	Ke	x	-	-	-	\$ 314,851
5	AMERICAN ECO SERVICES INC	SD	-	-	x	-	\$ 900,231
6	AMERICAN INSULATION INC	R, I	x	-	x	-	\$ 2,050,715
7	APPLIANCE RECYCLING CENTERS OF AMERICA	LA	x	-	-	-	\$ 19,515,200
8	ASSERT INC	LA, Ke	-	x	-	-	\$ 565,801
9	ASSOCIATED CONSTRUCTION SERVICES	LA	-	-	x	-	\$ 1,277,090
10	AVALON CARVER COMMUNITY CENTER INC	LA	-	x	-	-	\$ 265,061
11	B&W FURNACE SERVICE INC	LA	x	-	-	-	\$ 22,340
12	CAMPESINOS UNIDOS INC	R, I	-	x	x	x	\$ 362,540
13	COMMUNITY ACTION COMMISSION (SANTA BARBARA COUNTY)	Sba	-	x	-	x	\$ 99,551
14	COMMUNITY ACTION OF VENTURA COUNTY	V, LA	-	x	-	x	\$ 198,151
15	COMMUNITY ACTION PARTNERSHIP (OF SAN BERNADINO COUNTY)	Sbe	-	x	x	x	\$ 388,795
16	COMMUNITY ACTION PARTNERSHIP OF (SAN LUIS OBISPO)	SLO,	-	x	x	x	\$ 368,836
17	COMMUNITY ACTION PARTNERSHIP OF O C	OC	-	x	x	x	\$ 162,284
18	COMMUNITY ACTION PARTNERSHIP OF RIVERSIDE	R	-	x	-	x	\$ 139,060
19	COMMUNITY ENHANCEMENT SERVICES	LA	-	x	-	x	\$ 5,767
20	EAGLE SYSTEMS INTERNATIONAL INC	LA, R, T, Ki	x	-	-	-	\$ 4,612,941
21	EAST LOS ANGELES COMMUNITY UNION	LA, R, OC	-	x	x	-	\$ 11,388,085
22	EAST SAN GABRIEL VALLEY CONSORTIUM	LA	-	x	-	-	\$ 59,302
23	ECO IMPRINTS INC	SF	x	-	-	-	\$ 50,667
24	ECONO WEST INC	LA, Ke	x	-	x	-	\$ 630,401
25	ENERGY SERVICES & TECHNOLOGIES INC	LA, OC, R, Sbe	x	-	x	-	\$ 13,203
26	ENVIRONMENTAL ASSESSMENT SERVICES	LA, R, Sbe	x	-	x	-	\$ 618,351
27	FCI MANAGEMENT CONSULTANTS	LA, OC, SD	x	-	x	-	\$ 46,581
28	GARCIA & SON'S HOME IMPROVEMENT INC	Ke, LA, T, Ki, F	-	x	x	-	\$ 90,759
29	GARCIA & SONS HOME IMPROVEMENT	Ke	x	-	x	-	\$ 402,177
30	HARRISON AIR CONDITIONING	R, Sbe, I	-	-	x	-	\$ -
31	HIGHLANDS ENERGY SERVICES INC	T, Ki, F	x	-	x	-	\$ 3,298,619
32	JOHN HARRISON CONTRACTING INC	R	-	-	x	-	\$ 180,404
33	LONG BEACH COMMUNITY	LA	-	x	x	x	\$ 445
34	MARAVILLA FOUNDATION	LA	-	x	x	x	\$ 10,530,646
35	MASCO CONTRACTOR SERVICES OF	LA, R, Sbe, I, Ke, Ki, Tu	x	-	-	x	\$ 2,479,209
36	OASIS AIR CONDITIONING	Ke	x	-	-	-	\$ -
37	PACIFIC ASIAN CONSORTIUM IN	ALL	-	x	x	x	\$ 604,046
38	PACIFIC COAST ENERGY CONSERVATION	Ke	x	-	-	-	\$ 191,205
39	PROTEUS INC	T	-	x	-	-	\$ 4,495,864
40	QUALITY CONSERVATION SERVICES INC	LA	x	-	-	-	\$ 2,564,198
41	RELIABLE ENERGY MANAGEMENT INC	LA	x	-	x	-	\$ 5,326,112
42	RICHARD HEATH & ASSOCIATES INC	ALL	x	-	x	-	\$ 953,907
43	SIERRA WEATHERIZATION COMPANY INC	LA	x	-	-	-	\$ 6,148,542
44	SILICON VALLEY FOUNDATION	SC	-	-	x	-	\$ 205,523
45	SOCO AIR CONDITIONING CO	R, Sbe	x	-	-	-	\$ 278,413
46	STAPLES & ASSOC	T, Ki, F	x	-	-	-	\$ 605,619
47	SYNERGY MECHANICAL AIR CONDITIONING	Sbe, LA, R, SFERN	-	-	x	-	\$ 632,038
48	TONY'S HEATING & A/C SERVICE INC.	LA, OC	-	-	x	x	\$ 749,180
49	TRI-STATE HOME IMPROVEMENTS INC	R	x	-	x	-	\$ 114,545
50	VETERANS IN COMMUNITY SERVICES INC	LA	-	x	x	-	\$ 1,569,210
51	WATTS LABOR COMMUNITY ACTION COMM	LA	-	x	x	-	\$ 271,863
52	WESTERN INSULATION LP	LA, R, Sbe, I, Ke, Ki, Tu	x	-	-	x	\$ 1,690,311
53	Total Contractor Expenditures						\$ 87,438,638
54							
55							
56	¹ Key						
57	Los Angeles	LA					
58	Orange County	OC					
59	Ventura	V					
60	San Bernadino	Sbe					
61	Riverside	R					
62	Imperial	I					
63	Tulare	T					
64	Kings	Ki					
65	Kern	Ke					
66	Santa Barbara	Sba					
67	San Luis Obispo	SLO					
68	Fresno	F					
69	San Diego	SD					
70	San Fernando	SFERN					
71	Santa Clara	SC					
72	San Francisco	SF					
73							
74	² The expenditures do not include a credit of (\$403,081) for the high efficiency clothes washer rebates from (Eastern Municipal Water District, Park						
75	Water Co, San Gabriel Water Co. and other journal entrv corrections for misc. revenue). \$87,438,638 - \$403,081 = \$87,035,557. (See ESAP Table - 7 Contract).						

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
1	PY 2014 Energy Savings Assistance Program Annual Report																		
	ESA Program Table 6																		
	ESA Program Installation Cost of Program Installation Contractors																		
	SOUTHERN CALIFORNIA GAS COMPANY																		
2		Unit of Measure	CBO/WMDVBE						Non-CBO/WMDVBE						2014 Program Total				
3			Installations		Dwellings		Costs		Installations		Dwellings		Costs		Units Installed	Households	Costs ¹	Cost/ Unit	Cost/ Household
4			Units	%	Units	%	\$	%	Units	%	Units	%	\$	%					
5	Dwellings	Each	72,191	78%	72,191	78%	\$47,468,354.05	55%	20,776	22%	20,776	22%	\$38,098,950.05	45%	92,967	92,967	\$85,567,304.10	\$920.41	\$920.41
6	Appliances																		
7	High Efficiency Clothes Washer	Each	0	0%	0	0%	\$2,515.00	0%	26,036	100%	26,036	100%	\$19,517,275.00	100%	26,036	26,036	\$19,519,790.00	\$749.72	\$749.72
8	Refrigerators	Each																	
9	Microwaves	Each																	
10	Domestic Hot Water																		
11	Water Heater Blanket	Home	1,443	41%	1,443	41%	\$79,895.79	41%	2,087	59%	2,086	59%	\$116,015.93	59%	3,530	3,529	\$195,911.72	\$55.50	\$55.51
12	Low Flow Shower Head	Home	90,343	68%	60,734	69%	\$2,681,701.57	68%	42,508	32%	26,834	31%	\$1,259,155.80	32%	132,851	87,568	\$3,940,857.38	\$29.66	\$45.00
13	Water Heater Pipe Insulation	Home	1,647	50%	1,558	50%	\$35,990.35	50%	1,656	50%	1,569	50%	\$35,381.61	50%	3,303	3,127	\$71,371.97	\$21.61	\$22.82
14	Faucet Aerator	Home	124,412	69%	59,270	70%	\$1,021,957.97	70%	55,267	31%	25,498	30%	\$447,453.27	30%	179,679	84,768	\$1,469,411.24	\$8.18	\$17.33
15	Water Heater Repair/Replacement	Each	903	79%	902	79%	\$1,011,879.82	73%	245	21%	245	21%	\$372,149.95	27%	1,148	1,147	\$1,384,029.77	\$1,205.60	\$1,206.65
16	Thermostatic Shower Valve	Each	74,342	66%	50,203	68%	\$3,306,167.67	67%	37,480	34%	23,911	32%	\$1,648,895.34	33%	111,822	74,114	\$4,955,063.00	\$44.31	\$66.86
17	Enclosure																		
18	Air Sealing / Envelope	Home	858,621	70%	49,933	68%	\$13,690,631.13	71%	367,371	30%	23,464	32%	\$5,681,707.62	29%	1,225,992	73,397	\$19,372,338.75	\$15.80	\$263.94
19	Attic Insulation	Home	3,175,354	55%	3,210	57%	\$3,659,041.78	55%	2,621,990	45%	2,448	43%	\$3,005,333.58	45%	5,797,344	5,658	\$6,664,375.36	\$1.15	\$1,177.87
20	HVAC																		
21	FAU Standing Pilot Light Conversion	Each	123	90%	123	90%	\$40,865.22	90%	14	10%	14	10%	\$4,690.43	10%	137	137	\$45,555.65	\$332.52	\$332.52
22	Furnace Repair/Replacement	Each	8,180	89%	7,889	89%	\$8,492,449.52	88%	1,033	11%	1,020	11%	\$1,210,796.40	12%	9,213	8,909	\$9,703,245.92	\$1,053.21	\$1,089.15
23	Room A/C Replacement	Each																	
24	Central A/C Replacement	Each																	
25	Heat Pump Replacement	Each																	
26	Evaporative Coolers (Replacement)	Each																	
27	Evaporative Coolers (Installation)	Each																	
28	Duct Testing and Sealing	Home	2,932	53%	1,298	53%	\$1,263,204.55	64%	2,631	47%	1,170	47%	\$718,073.90	36%	5,563	2,468	\$1,981,278.45	\$356.15	\$802.79
29	Maintenance																		
30	Furnace Clean and Tune	Home	19,637	70%	18,752	70%	\$1,029,899.98	70%	8,503	30%	7,918	30%	\$447,121.14	30%	28,140	26,670	\$1,477,021.12	\$52.49	\$55.38
31	Central A/C Tune-up	Home																	
32	Evaporative Cooler Maintenance	Home																	
33	Lighting																		
34	Compact Fluorescent Lights (CFLs)	Each																	
35	Interior Hard wired CFL fixtures	Each																	
36	Exterior Hard wired CFL fixtures	Each																	
37	Torchiere	Each																	
38	Occupancy Sensor	Each																	
39	LED Night Lights	Each																	
40	Miscellaneous																		
41	Pool Pumps	Each																	
42	Smart Power Strips	Each																	
43	Pilots																		
44		Each																	
45		Each																	
46	Customer Enrollment																		
47	Outreach & Assessment	Home	72,191	78%	72,191	78%	\$10,298,946.20	75%	20,776	22%	20,776	22%	\$3,391,480.08	25%	92,967	92,967	\$13,690,426.28	\$147.26	\$147.26
48	In-Home Education	Home	69,579	78%	69,579	78%	\$853,207.50	78%	19,095	22%	19,095	22%	\$243,420.00	22%	88,674	88,674	\$1,096,627.50	\$12.37	\$12.37
49																			
50	¹ The Total Savings/Expenditures amount does not include credits, expenses, or required adjustments for this period in various IO's																		

	A	B	C	D	E
1	PY 2014 Energy Savings Assistance Program Annual Report ESA Program Table 7 Expenditures Recorded by Cost Element SOUTHERN CALIFORNIA GAS COMPANY				
2					
3	ESA Program:	Labor¹	Non-Labor²	Contractor³	Total
4	Energy Efficiency				
5	Appliances	\$ -	\$ -	\$ 19,138,127	\$ 19,138,127
6	Domestic Hot Water	\$ -	\$ -	\$ 12,016,545	\$ 12,016,545
7	Enclosure	\$ -	\$ -	\$ 26,035,602	\$ 26,035,602
8	HVAC	\$ -	\$ -	\$ 11,736,654	\$ 11,736,654
9	Maintenance	\$ -	\$ -	\$ 1,477,021	\$ 1,477,021
10	Lighting	\$ -	\$ -	\$ -	\$ -
11	Miscellaneous	\$ -	\$ -	\$ -	\$ -
12	Customer Enrollment	\$ 363,785	\$ 97,653	\$ 13,685,000	\$ 14,146,438
13	In Home Education	\$ -	\$ 96,781	\$ 1,146,740	\$ 1,243,521
14	Pilot	\$ -	\$ -	\$ -	
15	Energy Efficiency TOTAL	\$ 363,785	\$ 194,434	\$ 85,235,689	\$ 85,793,909
16					
17	Training Center	\$ 286,293	\$ 45,183	\$ -	\$ 331,476
18	Inspections	\$ -	\$ -	\$ 1,799,868	\$ 1,799,868
19	Marketing and Outreach	\$ -	\$ 1,187,445	\$ -	\$ 1,187,445
20	Statewide Marketing Education and Outreach	\$ -	\$ -	\$ -	\$ -
21	Measurement and Evaluation Studies ⁴	\$ -	\$ (1,885)	\$ -	\$ (1,885)
22	Regulatory Compliance	\$ 241,342	\$ 7,308	\$ -	\$ 248,650
23	General Administration	\$ 3,857,292	\$ 557,096	0	\$ 4,414,388
24	CPUC Energy Division	\$ -	\$ 7,505	0	\$ 7,505
25					
26	TOTAL PROGRAM COSTS	\$ 4,748,712	\$ 1,997,086	\$ 87,035,557	\$ 93,781,355
27					
28					
29	¹ Labor: Utility staff labor including indirects (vacation and sick leave, payroll taxes, and affiliate labor indirects).				
30	² Non-Labor: All Other non-labor cost excluding contractor cost defined below.				
31	³ Contractor: Expenses associated with contractor installations, Weatherization, Inspections, Outreach and Assessment, and In				
32	Home Energy Education services.				
33	⁴ Accual credit balance in M&E of (\$1,884.93) due to M&E over-accrual in 2013 where actual payments made in 2014 were less than accrual estimate.				

	A	B	C	D	E	F	G	H	I
1	PY 2014 Energy Savings Assistance Program Annual Report ESA Program Table 8 ESA Program Homes Unwilling / Unable to Participate SOUTHERN CALIFORNIA GAS COMPANY								
2	Reason Provided								
3	County	Customer/ Landlord Declined Program Measures or is Non-Responsive	Customer Unavailable - Scheduling Conflicts	Hazardous Environment (unsafe/unclean)	Insufficient feasible Measures	Ineligible Dwelling - Prior Program Participation	Household Income Exceeds Allowable Limits	Unable to Provide Required Documentation	Other
4	Fresno	158	0	0	14	3	72	0	7
5	Imperial	60	0	0	6	0	43	40	5
6	Kern	52	13	0	6	7	50	5	8
7	Kings	353	0	0	48	4	151	1	15
8	Los Angeles	1,698	73	0	206	15	816	410	98
9	Orange	232	12	0	82	17	155	47	22
10	Riverside	602	5	0	29	13	555	315	63
11	San Bernardino	373	6	0	33	3	301	148	45
12	San Luis Obispo	4	0	0	1	0	7	4	1
13	Santa Barbara	92	0	0	11	0	24	3	6
14	Tulare	1,321	0	0	47	19	777	8	51
15	Ventura	127	2	0	5	2	17	0	5
16	Total	5,072	111	0	488	83	2,968	981	326

	A	B	C	D	E	F	G
1	PY 2014 Energy Savings Assistance Program Annual Report ESA Program Table 9 Life Cycle Bill Savings by Measure SOUTHERN CALIFORNIA GAS COMPANY						
2	Measure Description		2014 Number Installed	Per Measure Electric Impact - Average (kWh)	Per Measure Gas Impact (Therms)	Effective Useful Life (EUL)	2014 Total Measure Life Cycle Bill Savings
3	Appliances						
4	High Efficiency Clothes Washer	Each	26,036		27.30	14	\$3,660,542
5	Refrigerators	Each					
6	Microwaves	Each					
7	Domestic Hot Water						
8	Water Heater Blanket	Home	3,529		4.66	5	\$36,532
9	Low Flow Shower Head	Home	87,568		3.54	10	\$1,880,652
10	Water Heater Pipe Insulation	Home	3,127		3.02	15	\$52,517
11	Faucet Aerator	Home	84,768		0.71	5	\$286,423
12	Water Heater Repair/Replacement	Each	1,148		0.00	6	\$0
13	Thermostatic Shower Valve	Each	111,822		13.60	10	\$6,109,617
14	Enclosure						
15	Air Sealing / Envelope	Home	73,397		3.58	10	\$1,079,217
16	Attic Insulation	Home	5,658		7.42	25	\$304,685
17	HVAC						
18	FAU Standing Pilot Light Conversion	Each	137		42.00	18	\$34,995
19	Furnace Repair/Replacement	Each	9,213		0.00	14	\$0
20	Room A/C Replacement	Each					
21	Central A/C Replacement	Each					
22	Heat Pump Replacement	Each					
23	Evaporative Coolers (Replacement)	Each					
24	Evaporative Coolers (Installation)	Each					
25	Duct Testing and Sealing	Home	2,468		0.00	25	\$0
26	Maintenance						
27	Furnace Clean and Tune	Home	26,670		2.46	14	\$356,872
28	Central A/C Tune-up	Home					
29	Evaporative Cooler Maintenance	Home					
30	Lighting						
31	Compact Fluorescent Lights (CFLs)	Each					
32	Interior Hard wired CFL fixtures	Each					
33	Exterior Hard wired CFL fixtures	Each					
34	Torchiere	Each					
35	Occupancy Sensor	Each					
36	LED Night Lights	Each					
37	Miscellaneous						
38	Pool Pumps	Each					
39	Smart Power Strips	Each					
40	Pilots						
41		Each					
42							
43	Total Homes Served By the Program		93,812				93,812
44	Life Cycle Bill Savings Per Home						\$ 147

	A	B	C
1	PY 2014 Energy Savings Assistance Program Annual Report ESA Program Table 10 Energy Rate Used for Bill Savings Calculations SOUTHERN CALIFORNIA GAS COMPANY		
2	Year	\$/kWh	\$/Therm
3	2014		0.50
4	2015		0.51
5	2016		0.53
6	2017		0.54
7	2018		0.56
8	2019		0.57
9	2020		0.59
10	2021		0.61
11	2022		0.63
12	2023		0.65
13	2024		0.67
14	2025		0.69
15	2026		0.71
16	2027		0.73
17	2028		0.75
18	2029		0.77
19	2030		0.80
20	2031		0.82
21	2032		0.84
22	2033		0.87
23	2034		0.89
24	2035		0.92
25	2036		0.95
26	2037		0.98
27	2038		1.01

	A	B	C	D	E
1	PY 2014 Energy Savings Assistance Program Annual Report ESA Program Table 11 Bill Savings Calculations by Program Year SOUTHERN CALIFORNIA GAS COMPANY				
2	Program Year	Program Costs	Program Lifecycle Bill Savings	Program Bill Savings/ Cost Ratio	Per Home Average Lifecycle Bill Savings
3	2011	\$ 102,229,848	\$ 25,969,055	0.25	\$ 161
4	2012	\$ 82,252,135	\$ 10,706,569	0.13	\$ 110
5	2013	\$ 97,554,614	\$ 14,434,223	0.15	\$ 135
6	2014	\$ 93,781,355	\$ 13,802,052	0.15	\$ 147
7					
8					
9					

1	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
2	PY2014 Energy Savings Assistance Program Annual Report																									
3	ESA ProgramTable 12																									
4	Energy Savings Assistance Program Fund Shifting																									
5	SOUTHERN CALIFORNIA GAS COMPANY																									
6	FUND SHIFT AMOUNT																									
7	Date	Program Year 2014	Electric	Gas	Total Authorized	Electric	Gas	Total Expenditures	(Shift) or Carried Forward			Among Categories within			Carry Forward from 2012			Carry Back from 2014			Total Shifted Gas/ Electric	% of Authorized Total	Fund Shifting Source	To/From Year	Fund Shift Description	Authorization
8									Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total			1. Current Year Authorized			
9																						2. Carried Forward				
10		ESA Program	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	(\$x,xxx)	x%	Carried Forward	From 2008	From In-Home Energy Education	G-xxxx, D.xx-xx-xxx
11		Energy Efficiency																								
12	April	Appliance ¹	\$ -	\$ 17,785,150	\$ 17,785,150	\$ -	\$ 19,138,127	\$ 19,138,127	\$ -	\$ 1,352,977	\$ 1,352,977	\$ -	\$ -	\$ -	\$ -	\$ 1,352,977	\$ 1,352,977	\$ -	\$ -	\$ -	\$ 1,352,977	8%	1. Carried Forward	1. From 2012	1. From 2012 unspent funds carried forward.	1. Authorized by D.12-08-044, Section 6.2 Fund Shifting Rules.
13		Domestic Hot Water	\$ -	\$ 16,843,374	\$ 16,843,374	\$ -	\$ 12,016,545	\$ 12,016,545	\$ -	\$ (4,826,829)	\$ (4,826,829)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. Carried Forward	1. From 2012	1. From 2012 unspent funds carried forward.	1. Authorized by D.12-08-044, Section 6.2 Fund Shifting Rules.
14		Enclosure	\$ -	\$ 41,983,756	\$ 41,983,756	\$ -	\$ 26,035,602	\$ 26,035,602	\$ -	\$ (15,948,154)	\$ (15,948,154)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. Carried Forward	1. From 2012	1. From 2012 unspent funds carried forward.	1. Authorized by D.12-08-044, Section 6.2 Fund Shifting Rules.
15		HVAC	\$ -	\$ 19,210,885	\$ 19,210,885	\$ -	\$ 11,736,654	\$ 11,736,654	\$ -	\$ (7,474,231)	\$ (7,474,231)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. Carried Forward	1. From 2012	1. From 2012 unspent funds carried forward.	1. Authorized by D.12-08-044, Section 6.2 Fund Shifting Rules.
16		Maintenance	\$ -	\$ 2,128,846	\$ 2,128,846	\$ -	\$ 1,477,021	\$ 1,477,021	\$ -	\$ (651,825)	\$ (651,825)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. Carried Forward	1. From 2012	1. From 2012 unspent funds carried forward.	1. Authorized by D.12-08-044, Section 6.2 Fund Shifting Rules.
17		Lighting	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		1. Carried Forward	1. From 2012	1. From 2012 unspent funds carried forward.	1. Authorized by D.12-08-044, Section 6.2 Fund Shifting Rules.
18		Miscellaneous	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		1. Carried Forward	1. From 2012	1. From 2012 unspent funds carried forward.	1. Authorized by D.12-08-044, Section 6.2 Fund Shifting Rules.
19		Customer Enrollment	\$ -	\$ 20,834,354	\$ 20,834,354	\$ -	\$ 14,146,438	\$ 14,146,438	\$ -	\$ (6,687,916)	\$ (6,687,916)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. Carried Forward	1. From 2012	1. From 2012 unspent funds carried forward.	1. Authorized by D.12-08-044, Section 6.2 Fund Shifting Rules.
20		In Home Education	\$ -	\$ 2,531,192	\$ 2,531,192	\$ -	\$ 1,243,521	\$ 1,243,521	\$ -	\$ (1,287,671)	\$ (1,287,671)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. Carried Forward	1. From 2012	1. From 2012 unspent funds carried forward.	1. Authorized by D.12-08-044, Section 6.2 Fund Shifting Rules.
21		Pilot	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		1. Carried Forward	1. From 2012	1. From 2012 unspent funds carried forward.	1. Authorized by D.12-08-044, Section 6.2 Fund Shifting Rules.
22		Energy Efficiency TOTAL	\$ -	\$ 121,317,557	\$ 121,317,557	\$ -	\$ 85,793,909	\$ 85,793,909	\$ -	\$ (35,523,648)	\$ (35,523,648)	\$ -	\$ -	\$ -	\$ -	\$ 1,352,977	\$ 1,352,977	\$ -	\$ -	\$ -	\$ 1,352,977	1%	1. Carried Forward	1. From 2012	1. From 2012 unspent funds carried forward.	1. Authorized by D.12-08-044, Section 6.2 Fund Shifting Rules.
23																										
24		Training Center	\$ -	\$ 681,105	\$ 681,105	\$ -	\$ 331,476	\$ 331,476	\$ -	\$ (349,629)	\$ (349,629)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. Carried Forward	1. From 2012	1. From 2012 unspent funds carried forward.	1. Authorized by D.12-08-044, Section 6.2 Fund Shifting Rules.
25		Inspections	\$ -	\$ 3,361,051	\$ 3,361,051	\$ -	\$ 1,799,868	\$ 1,799,868	\$ -	\$ (1,561,183)	\$ (1,561,183)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. Carried Forward	1. From 2012	1. From 2012 unspent funds carried forward.	1. Authorized by D.12-08-044, Section 6.2 Fund Shifting Rules.
26		Marketing and Outreach	\$ -	\$ 1,198,436	\$ 1,198,436	\$ -	\$ 1,187,445	\$ 1,187,445	\$ -	\$ (10,991)	\$ (10,991)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. Carried Forward	1. From 2012	1. From 2012 unspent funds carried forward.	1. Authorized by D.12-08-044, Section 6.2 Fund Shifting Rules.
27		Statewide ME&O	\$ -	\$ 100,000	\$ 100,000	\$ -	\$ -	\$ -	\$ -	\$ (100,000)	\$ (100,000)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. Carried Forward	1. From 2012	1. From 2012 unspent funds carried forward.	1. Authorized by D.12-08-044, Section 6.2 Fund Shifting Rules.
28		M&E Studies	\$ -	\$ 91,667	\$ 91,667	\$ -	\$ (1,885)	\$ (1,885)	\$ -	\$ (93,552)	\$ (93,552)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ (88,520)	\$ (88,520)	\$ (88,520)	-97%	1. Carried Back	1. To 2013	1. From 2014 M&E budget.	2. Authorized by D.12-08-044, Section 6.2 Fund Shifting Rules.
29		Regulatory Compliance	\$ -	\$ 295,333	\$ 295,333	\$ -	\$ 248,650	\$ 248,650	\$ -	\$ (46,683)	\$ (46,683)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. Carried Forward	1. From 2012	1. From 2012 unspent funds carried forward.	1. Authorized by D.12-08-044, Section 6.2 Fund Shifting Rules.
30		General Administration	\$ -	\$ 5,286,041	\$ 5,286,041	\$ -	\$ 4,414,388	\$ 4,414,388	\$ -	\$ (871,653)	\$ (871,653)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. Carried Forward	1. From 2012	1. From 2012 unspent funds carried forward.	1. Authorized by D.12-08-044, Section 6.2 Fund Shifting Rules.
31		CPUC Energy Division	\$ -	\$ 86,000	\$ 86,000	\$ -	\$ 7,505	\$ 7,505	\$ -	\$ (78,495)	\$ (78,495)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. Carried Forward	1. From 2012	1. From 2012 unspent funds carried forward.	1. Authorized by D.12-08-044, Section 6.2 Fund Shifting Rules.
32																										
33		TOTAL PROGRAM COSTS	\$ -	\$ 132,417,190	\$ 132,417,190	\$ -	\$ 93,781,355	\$ 93,781,355	\$ -	\$ (38,635,835)	\$ (38,635,835)	\$ -	\$ -	\$ -	\$ -	\$ 1,352,977	\$ 1,352,977	\$ -	\$ (88,520)	\$ (88,520)	\$ 1,264,457	1%				
34		² Carry Forward from PY 2012 = \$1,352,977	\$ -	\$ 1,352,977	\$ 1,352,977	\$ -	\$ -	\$ -	\$ -	\$ (1,352,977)	\$ (1,352,977)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -					
35		³ Carry Back To 2013 from 2014 = (\$88,520)	\$ -	\$ (88,520)	\$ (88,520)	\$ -	\$ -	\$ -	\$ -	\$ 88,520	\$ 88,520	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -					
36		TOTAL PROGRAM INCLUDING CARRY FORWARD / CARRY BACK	\$ -	\$ 133,681,647	\$ 133,681,647	\$ -	\$ 93,781,355	\$ 93,781,355	\$ -	\$ (39,900,292)	\$ (39,900,292)	\$ -	\$ -	\$ -	\$ -	\$ 1,352,977	\$ 1,352,977	\$ -	\$ (88,520)	\$ (88,520)	\$ 1,264,457	1%				

37

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

39 ¹ SoCalGas' 2012 total unspent balance available for carry-forward was \$34,288,722 (2012 Phase II D. 014-08-030 authorized budget of \$127,199,269 less net 2012 carry-back to 2011 of \$3,049,478 less 2012 expenditures of \$82,252,135

40 less fundshift of \$7,608,934 carried forward from 2012 to 2013).

41 ² In April 2014 monthly report, SoCalGas noted a fundshift and increase to PY 2014 Appliance category budget by \$10,000,000 to fund contract value increases for vendors providing Appliance services. The shift was funded from the unspent 2012 balance of

42 \$34,288,722 reflected in the revised authorized budget D14-08-030. The fund shift that was noted in the April 2014 monthly report was prior to D. 014-08-030, but D.014-08-014 increased the Appliance budget by \$9,818,716, therefore, only \$1,352,977

43 of the fundshift was needed.

44 ³ In December 2013 Monthly report, SoCalGas noted a fund shift in Measurement & Evaluation budget of \$368,196 where the \$279,679 came from 2012 as carry forward plus the \$88,520 as carry back from 2014. Fund shift in Measurement & Evaluation

45 was to align the budget category amount for the cycle with the expenditures.

46

47

	A	B
1	PY 2014 Energy Savings Assistance Program Annual Report ESA Program Table 13 Categorical and Other Enrollment SOUTHERN CALIFORNIA GAS COMPANY	
2		
3		
4		
5		
6	Type of Enrollment	Number of customers treated ¹
7	Women, Infants, and Children Program (WIC)	7,321
8	Supplemental Security Income (SSI)	3,152
9	CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	2,387
10	CalWORKs/Temporary Assistance for Needy Families (TANF)	482
11	Tribal TANF	7
12	Medicaid/Medi-Cal for Families	9,000
13	Healthy Families A&B	398
14	National School Lunch Program (NSLP) - Free Lunch	1,413
15	Low-income Home Energy Assistance Program (LIHEAP)	445
16	Bureau of Indian Affairs General Assistance	7
17	Head Start Income Eligible - (Tribal Only)	1
18	Other (specify)	68,354
19	Total Number of Customers Enrolled	92,967
20	¹ Number of customers treated reflects categorical programs selected by customer. Please note in some case customer select more than one eligible program for a single account.	

[illegible]

	A	B	C	D	E	F
1	PY 2013 Energy Savings Assistance Program Annual Report					
2	ESA Program Table 15					
3	Lighting					
4	SOUTHERN CALIFORNIA GAS COMPANY					
5	ESA Program CFL Tracking Table					
6	Instructions: Please identify the CFL bulbs used within your ESA program and fill in the remaining columns for each					
7	Bulb Name / Identification	Bulb Description (wattage, lumens)	Bulb Cost (material)	Admin Cost (overhead, contractor fee, marketing, etc.)	Total Bulb Cost (material + admin)	AB 1109 Compliant? ¹
8						
9						
10						
11						
12						
13						
14						
15						
16						
17						
18						
19						
20						
21						
22						
23						
24						
25						
26						
27	Year	Number of Homes Treated in ESA Program	Number of Homes Provided CFLs	Avg. # of CFL bulbs given per home	Est. total energy savings from installed CFLs ²	
28						
29						
30						
31						
32						
33						
34	¹ Compliant in regards to: 1) Do bulbs meet or exceed CEC energy efficiency standards for general purpose lighting?					
35	Do all models comply with Europe's RoHS standards on toxicity?					
36	² Energy savings used are from the Load Impact Evaluation of the 2009 Energy Savings Assistance Program.					

	A	B	C	D	E	F	G	H
1	PY 2014 Energy Savings Assistance Program Annual Report ESA Program Table 16 "Add Back" Measures SOUTHERN CALIFORNIA GAS COMPANY							
2								
3								
4								
5			Ratio of Benefits Over Costs					
6	Measure	Climate Zone	Utility Cost Test	Modified Participant Test	Total Resource Cost Test	Quantity Installed	Budget Impact of "add Back"	Energy Savings Impact
7	Air sealing / envelope, MF	4	0.04	0.21	0.03	13	\$1,549	22
8	Air sealing / envelope, MF	5	0.04	0.24	0.03	289	\$33,735	569
9	Air sealing / envelope, MF	6	0.02	0.09	0.01	1,184	\$203,525	1,284
10	Air sealing / envelope, MF	7	N/A	N/A	N/A	0	\$0	0
11	Air sealing / envelope, MF	8	0.01	0.08	0.01	2,810.00	\$563,052	3,048
12	Air sealing / envelope, MF	9	0.02	0.09	0.01	5,053.00	\$902,354	5,481
13	Air sealing / envelope, MF	10	0.02	0.12	0.02	615.00	\$84,073	692
14	Air sealing / envelope, MF	13	0.03	0.18	0.02	895.00	\$133,773	1,654
15	Air sealing / envelope, MF	14	0.08	0.45	0.06	892.00	\$52,769	1,684
16	Air sealing / envelope, MF	15	0.02	0.12	0.02	227.00	\$33,859	274
17	Air sealing / envelope, MF	16	0.02	0.10	0.01	142.00	\$28,410	194
18	Air sealing / envelope, MH	4	0.39	2.17	0.28	12.00	\$1,586	306
19	Air sealing / envelope, MH	5	0.43	2.40	0.31	79.00	\$10,412	2,301
20	Air sealing / envelope, MH	6	0.27	1.50	0.19	177.00	\$24,084	2,908
21	Air sealing / envelope, MH	7	N/A	N/A	N/A	0	\$0	0
22	Air sealing / envelope, MH	8	0.12	0.69	0.09	13,285.00	\$3,903,420	196,941
23	Air sealing / envelope, MH	9	0.12	0.67	0.09	11,189.00	\$3,393,511	165,869
24	Air sealing / envelope, MH	10	0.15	0.85	0.11	12,860.00	\$3,057,698	192,707
25	Air sealing / envelope, MH	13	0.15	0.82	0.11	7,597.00	\$3,127,218	190,752
26	Air sealing / envelope, MH	14	0.23	1.27	0.17	2,823.00	\$720,674	71,790
27	Air sealing / envelope, MH	15	0.16	0.87	0.11	3,445.00	\$862,222	56,191
28	Air sealing / envelope, MH	16	0.15	0.83	0.11	1,544.00	\$463,871	28,657
29	Air sealing / envelope, SF	4	0.29	1.64	0.21	125.00	\$21,294	2,877
30	Air sealing / envelope, SF	5	0.25	1.39	0.18	1,245.00	\$296,618	32,711
31	Air sealing / envelope, SF	6	0.12	0.68	0.09	2,691.00	\$806,806	39,892
32	Air sealing / envelope, SF	7	N/A	N/A	N/A	0	\$0	0
33	Air sealing / envelope, SF	8	0.12	0.69	0.09	13,285.00	\$3,903,420	196,941
34	Air sealing / envelope, SF	9	0.12	0.67	0.09	11,189.00	\$3,393,511	165,869
35	Air sealing / envelope, SF	10	0.15	0.85	0.11	12,860.00	\$3,057,698	192,707
36	Air sealing / envelope, SF	13	0.15	0.82	0.11	7,597.00	\$3,127,218	190,752
37	Air sealing / envelope, SF	14	0.23	1.27	0.17	2,823.00	\$720,674	71,790
38	Air sealing / envelope, SF	15	0.16	0.87	0.11	3,445.00	\$862,222	56,191

	A	B	C	D	E	F	G	H
39	Air sealing / envelope, SF	16	0.15	0.83	0.11	1,544.00	\$463,871	28,657
40	Attic insulation, MF	4	N/A	N/A	N/A	0	\$0	0
41	Attic insulation, MF	5	N/A	N/A	N/A	0	\$0	0
42	Attic insulation, MF	6	0.07	0.05	0.05	18	\$11,753	341
43	Attic insulation, MF	7	N/A	N/A	N/A	0	\$0	0
44	Attic insulation, MF	8	0.06	0.05	0.04	97.00	\$74,464	1,835
45	Attic insulation, MF	9	0.06	0.05	0.04	100.00	\$77,747	1,892
46	Attic insulation, MF	10	0.05	0.04	0.03	11.00	\$10,553	211
47	Attic insulation, MF	13	0.08	0.06	0.06	15.00	\$14,650	481
48	Attic insulation, MF	14	N/A	N/A	N/A	0	\$0	0
49	Attic insulation, MF	15	N/A	N/A	N/A	0	\$0	0
50	Attic insulation, MF	16	0.14	0.10	0.10	13.00	\$7,053	417
51	Attic insulation, SF	4	0.14	0.10	0.10	7.00	\$9,133	540
52	Attic insulation, SF	5	0.15	0.12	0.11	81.00	\$106,563	7,133
53	Attic insulation, SF	6	0.10	0.08	0.07	468.00	\$533,815	23,267
54	Attic insulation, SF	7	N/A	N/A	N/A	0	\$0	0
55	Attic insulation, SF	8	0.11	0.08	0.08	1,585	\$1,663,459	78,800
56	Attic insulation, SF	9	0.10	0.08	0.07	1,481	\$1,705,532	73,629
57	Attic insulation, SF	10	0.09	0.07	0.06	754	\$1,039,654	37,873
58	Attic insulation, SF	13	0.14	0.10	0.10	632	\$895,812	53,202
59	Attic insulation, SF	14	0.15	0.11	0.10	61	\$80,870	5,202
60	Attic insulation, SF	15	0.09	0.07	0.07	130	\$179,159	7,102
61	Attic insulation, SF	16	0.12	0.09	0.08	205	\$254,161	12,762
62	Duct sealing and testing, MF	6	0.00	0.00	0.00	3	\$1,354	0
63	Duct sealing and testing, MF	8	0.00	0.00	0.00	7	\$5,452	0
64	Duct sealing and testing, MF	9	0.00	0.00	0.00	2	\$5,271	0
65	Duct sealing and testing, MF	10	0.00	0.00	0.00	1	\$1,386	0
66	Duct sealing and testing, MF	13	N/A	N/A	N/A	0	\$0	0
67	Duct sealing and testing, MF	15	0.00	0.00	0.00	1	\$770	0
68	Duct sealing and testing, MF	16	0.00	0.00	0.00	1	\$266	0
69	Duct sealing and testing, MH	4	N/A	N/A	N/A	0	\$0	0
70	Duct sealing and testing, MH	5	N/A	N/A	N/A	0	\$0	0
71	Duct sealing and testing, MH	6	N/A	N/A	N/A	0	\$0	0
72	Duct sealing and testing, MH	7	N/A	N/A	N/A	0	\$0	0
73	Duct sealing and testing, MH	8	0.00	0.00	0.00	2	\$141	0
74	Duct sealing and testing, MH	9	0.00	0.00	0.00	2	\$1,716	0
75	Duct sealing and testing, MH	10	0.00	0.00	0.00	25	\$266	0
76	Duct sealing and testing, MH	13	N/A	N/A	N/A	0	\$0	0
77	Duct sealing and testing, MH	14	0.00	0.00	0.00	3	\$1,665	0
78	Duct sealing and testing, MH	15	0.00	0.00	0.00	7	\$16,862	0

	A	B	C	D	E	F	G	H
79	Duct sealing and testing, MH	16	N/A	N/A	N/A	0	\$0	0
80	Duct sealing and testing, SF	4	0.00	0.00	0.00	4	\$4,574	0
81	Duct sealing and testing, SF	5	0.00	0.00	0.00	3	\$26,534	0
82	Duct sealing and testing, SF	6	0.00	0.00	0.00	67	\$33,664	0
83	Duct sealing and testing, SF	7	N/A	N/A	N/A	0	\$0	0
84	Duct sealing and testing, SF	8	0.00	0.00	0.00	212	\$133,026	0
85	Duct sealing and testing, SF	9	0.00	0.00	0.00	664	\$322,530	0
86	Duct sealing and testing, SF	10	0.00	0.00	0.00	1,044	\$676,408	0
87	Duct sealing and testing, SF	13	0.00	0.00	0.00	44	\$275,475	0
88	Duct sealing and testing, SF	14	0.00	0.00	0.00	85	\$116,009	0
89	Duct sealing and testing, SF	15	0.00	0.00	0.00	169	\$270,247	0
90	Duct sealing and testing, SF	16	0.00	0.00	0.00	122	\$61,053	0
91	Heating system, MF	6	0.00	0.00	0.00	10	\$16,193	0
92	Heating system, MF	7	N/A	N/A	N/A	0	\$0	0
93	Heating system, MF	8	0.00	0.00	0.00	34	\$33,373	0
94	Heating system, MF	9	0.00	0.00	0.00	22	\$17,019	0
95	Heating system, MF	10	0.00	0.00	0.00	4	\$5,625	0
96	Heating system, MF	13	N/A	N/A	N/A	0	\$0	0
97	Heating system, MF	14	0.00	0.00	0.00	1	\$711	0
98	Heating system, MF	15	0.00	0.00	0.00	1	\$4,079	0
99	Heating system, MF	16	0.00	0.00	0.00	3	\$2,489	0
100	Heating system, MH	4	N/A	N/A	N/A	0	\$0	0
101	Heating system, MH	5	0.00	0.00	0.00	5	\$4,687	0
102	Heating system, MH	6	0.00	0.00	0.00	31	\$34,463	0
103	Heating system, MH	7	N/A	N/A	N/A	0	\$0	0
104	Heating system, MH	8	0.00	0.00	0.00	125	\$115,012	0
105	Heating system, MH	9	0.00	0.00	0.00	104	\$114,493	0
106	Heating system, MH	10	0.00	0.00	0.00	241	\$278,069	0
107	Heating system, MH	13	0.00	0.00	0.00	50	\$39,309	0
108	Heating system, MH	14	0.00	0.00	0.00	42	\$62,475	0
109	Heating system, MH	15	0.00	0.00	0.00	26	\$17,227	0
110	Heating system, MH	16	0.00	0.00	0.00	5	\$8,561	0
111	Heating system, SF	4	0.00	0.00	0.00	3	\$2,192	0
112	Heating system, SF	5	0.00	0.00	0.00	181	\$170,761	0
113	Heating system, SF	6	0.00	0.00	0.00	469	\$552,578	0
114	Heating system, SF	7	N/A	N/A	N/A	0	\$0	0
115	Heating system, SF	8	0.00	0.00	0.00	2,968	\$3,201,598	0
116	Heating system, SF	9	0.00	0.00	0.00	2,005	\$2,171,480	0

[illegible]

	A	B	C	D	E	F	G	H
1	PY 2014 CARE Annual Report							
2	CARE Table 1							
3	Overall Program Expenses							
4	SOUTHERN CALIFORNIA GAS COMPANY							
5	Category	Overall		Total	Authorized Budget ¹	% of Budget Spent	Total Shifted	Shifted to/from?
6		Electric	Gas					
7	Outreach ²⁻³	\$ -	\$ 4,424,684	\$ 4,424,684	\$ 3,750,223	118%	\$ 674,461	From unspent 2012 authorized budget to 2014 authorized budget.
8	Processing, Certification, Recertification	\$ -	\$ 1,033,376	\$ 1,033,376	\$ 4,488,248	23%		
9	Post Enrollment Verification	\$ -	\$ 333,764	\$ 333,764	\$ 3,744,000	9%		
10	IT Programming	\$ -	\$ 897,354	\$ 897,354	\$ 2,937,450	31%		
11	Cool Centers	\$ -	\$ -	\$ -	\$ -	N/A		
12	Pilots	\$ -	\$ 75,000	\$ 75,000	\$ 180,000	42%		
13	Measurement & Evaluation ⁴	\$ -	\$ 63,254	\$ 63,254	\$ 18,659	339%	\$ 44,595	From unspent 2012 & 2013 authorized budget to 2014 authorized budget.
14	Regulatory Compliance ⁵	\$ -	\$ 367,741	\$ 367,741	\$ 242,507	152%	\$ 125,234	From 2014 General Admin authorized budget to 2014 Reg Compliance authorized budget.
15	General Administration ⁵	\$ -	\$ 808,918	\$ 808,918	\$ 943,426	86%	\$ (125,234)	To 2014 Regulatory Comp Authorized Budget from 2014 General Admin authorized budget.
16	CPUC Energy Division	\$ -	\$ 17,512	\$ 17,512	\$ 60,000	29%		
17								
18	TOTAL Program Costs	\$ -	\$ 8,021,603	\$ 8,021,604	\$ 16,364,513	49%		
19								
20	CARE Rate Discount	\$ -	\$ 109,488,808	\$ 109,488,808	\$ 131,142,177	83%		
21								
22	TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	\$ -	\$ 117,510,411	\$ 117,510,411	\$ 147,506,690	80%		

¹ Pursuant to D.14-08-030, budgets reflect the Phase II Decision authorized 2014 budget amounts.

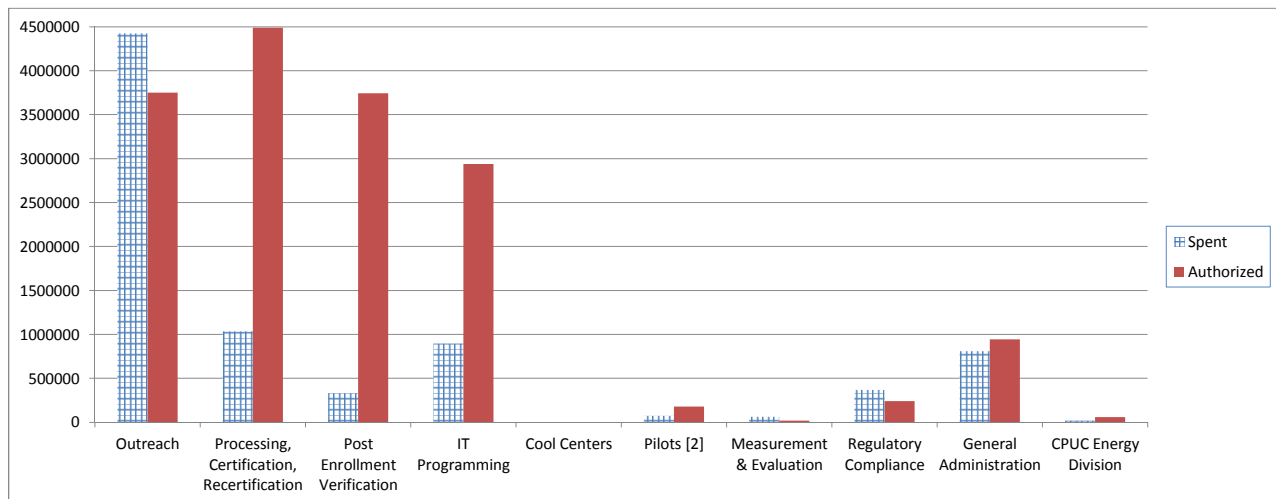
² In November 2014, SCG increased PY 2014 Outreach category budget by \$880,000 to fund Outreach activities. The shift was funded from the unspent 2012 available balance of \$880,337 reflected in the revised authorized budget D14-08-030. However, only \$674,461 of the fundshift was needed.

³ Outreach cost adjusted to include an add back amt of \$67,425 related Feb 2014 J.E. correction that moved costs from Outreach to Medical Baseline (O&M) associated with a December 2014 charge. The Outreach number in the 2013 annual report included a corresponding downward adjustment.

⁴ In November 2014, SCG increased PY 2014 M&E category budget by \$44,595 to fund M&E activities. The shift was funded from the unspent 2012 & 2013 available balance of \$55,789 reflected in the revised authorized budget D14-08-030.

⁵ Funds shifted within 2014 Authorized Budget from General Admin to Regulatory Compliance in the amount of \$125,234.

Bar Chart 1 - Total Spent vs. Authorized by Category



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	
1	PY 2014 CARE Annual Report																									
2	CARE Table 2																									
3	Enrollment, Recertification, Attrition, & Penetration																									
4	SOUTHERN CALIFORNIA GAS COMPANY																									
5		Automatic Enrollment				New Enrollment				Recertification				Attrition				Enrollment				Total CARE Participants	Estimated CARE Eligible	Penetration Rate % (W/X)		
6						Self-Certification (Income or Categorical)				Total New Enrollment (E+J)				Total Recertification (L+M+N)				Total Attrition (P+Q+R+S)							Gross (K+O)	
7		Inter-Utility ¹	Intra-Utility ²	Leveraging ³	Combined (B+C+D)	Online	Paper	Phone	Combined (F+G+H)	Capitation	Scheduled	Non-Scheduled (Duplicates)	Automatic	Total Recertification (L+M+N)	No Response to Recert	Failed PEV	Failed Recertification	Other	Total Attrition (P+Q+R+S)	Gross (K+O)	Net Adjusted (K-T)					
8	January	4,616	2,689	139	7,444	2,198	17,856	714	20,768	0	28,212	19,400	13,934	8,686	42,020	15,255	1,748	619	8,455	26,077	70,232	2,135	1,606,546	1,894,724	84.79%	
9	February	5,280	3,172	172	8,172	1,941	16,632	916	16,491	0	24,684	18,033	20,082	8,653	46,768	13,843	1,674	477	12,195	28,189	71,431	(3,528)	1,604,487	1,894,724	84.68%	
10	March	4,938	3,142	221	8,301	3,019	13,440	591	17,050	0	25,351	15,789	13,123	11,043	39,955	15,373	752	456	12,879	29,457	65,306	(4,106)	1,600,381	1,894,724	84.47%	
11	April	4,536	3,147	240	7,923	2,617	16,888	890	20,195	2	28,120	16,345	11,253	12,885	40,483	12,444	2,654	319	12,649	28,057	68,603	63	1,600,444	1,898,175	84.31%	
12	May	4,346	2,912	324	7,582	2,162	15,086	858	18,106	4	25,692	17,273	11,060	6,934	35,267	16,096	1,690	425	18,798	37,009	60,959	(11,317)	1,589,127	1,898,175	83.72%	
13	June	4,204	2,535	322	7,061	2,649	18,479	601	21,729	0	28,790	29,308	17,576	9,351	56,025	13,024	2,494	498	16,029	32,045	85,025	(3,255)	1,585,872	1,898,175	83.55%	
14	July	5,633	2,457	269	8,359	2,288	20,513	918	23,719	1	32,079	34,181	16,439	15,119	65,739	14,777	1,976	378	12,816	29,947	97,818	2,132	1,588,004	1,896,764	83.72%	
15	August	5,888	2,310	203	8,401	2,501	15,525	592	18,618	8	27,027	35,301	13,998	19,903	69,202	14,386	1,842	557	15,106	31,891	96,229	(4,864)	1,583,140	1,896,764	83.47%	
16	September	5,208	2,336	212	7,756	3,256	13,373	776	18,503	2	27,056	32,156	17,708	62,214	20,524	14,351	480	18,174	40,613	83,980	(19,847)	1,564,293	1,896,764	82.47%		
17	October	3,707	2,564	138	6,409	2,204	17,697	1,338	21,239	0	27,648	37,138	26,939	12,512	76,589	22,881	1,745	571	5,887	31,084	104,237	(3,436)	1,560,857	1,898,302	82.22%	
18	November	11,147	1,960	163	13,270	2,326	14,630	3,382	20,238	0	33,508	29,695	13,546	86,510	53,002	14,564	2,038	655	11,927	28,849	86,510	4,659	1,565,516	1,898,302	82.47%	
19	December	4,559	1,618	101	6,278	1,941	18,566	2,522	23,029	0	29,307	28,679	12,445	16,590	57,714	12,663	1,704	538	11,907	26,812	87,021	2,495	1,568,011	1,898,302	82.60%	
20	YTD Total	59,562	30,390	2,504	92,456	28,200	197,385	14,100	239,685	22	332,163	314,137	181,906	149,145	645,188	185,830	21,752	5,973	156,475	370,030	977,351	-37,867	1,568,011	1,898,302	82.60%	
21																										
22	Enrollments via data sharing between the IOUs.																									
23	Enrollments via data sharing between departments and/or programs within the utility.																									
24	Enrollments via data sharing with programs outside the IOU that serve low-income customers.																									
25	Enrollment numbers in Table 2 are defined as customers receiving the CARE discount in the following month. Customers are approved for or removed from CARE in the following month they apply but will receive the discount in the following month; the approval will be counted the following month; bii in the following month will count in the following month.																									

	A	B	C	D	E	F	G	H	I
1	PY 2014 CARE Annual Report								
2	CARE Table 3A								
3	Post-Enrollment Verification Results (Model) 2014								
4	SOUTHERN CALIFORNIA GAS COMPANY								
5	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) ¹	Total Households De-Enrolled ²	% De-enrolled through Post Enrollment Verification	% of Total CARE Households De-Enrolled
6	January	1,606,546	3,659	0.23%	1,696	164	1,860	50.83%	0.12%
7	February	1,604,487	4,858	0.30%	2,427	236	2,663	54.82%	0.17%
8	March	1,600,381	4,323	0.27%	2,240	206	2,446	56.58%	0.15%
9	April	1,600,444	3,792	0.24%	2,117	204	2,321	61.21%	0.15%
10	May	1,589,127	2,517	0.16%	1,273	103	1,376	54.67%	0.09%
11	June	1,585,872	3,519	0.22%	1,774	168	1,942	55.19%	0.12%
12	July	1,588,004	4,599	0.29%	2,608	263	2,871	62.43%	0.18%
13	August	1,583,140	3,483	0.22%	1,756	144	1,900	54.55%	0.12%
14	September	1,564,293	3,937	0.25%	2,025	172	2,197	55.80%	0.14%
15	October	1,560,857	4,437	0.28%	2,383	205	2,588	58.33%	0.17%
16	November	1,565,516	7,772	0.50%	4,876	453	5,329	68.57%	0.34%
17	December	1,568,011	4,863	0.31%	2,215	203	2,418	49.72%	0.15%
18	YTD Total	1,568,011	51,759	3.30%	27,390	2,521	29,911	57.79%	1.91%
19									
20	¹ Includes customers verified as over income or who requested to be de-enrolled.								
21	² Verification results are tied to the month initiated. Therefore, verification results may be pending due to the time permitted for a participant to respond.								
22									
23									
24	CARE Table 3B - Post-Enrollment Verification Results (High Usage)								
25	2014								
26	Not Applicable to SoCalGas								
27	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) ¹	Total Households De-Enrolled ²	% De-enrolled through Post Enrollment Verification	% of Total CARE Households De-Enrolled
28	January								
29	February								
30	March								
31	April								
32	May								
33	June								
34	July								
35	August								
36	September								
37	October								
38	November								
39	December								
40	YTD Total	0	0	0.00%	0	0	0	0.00%	0.00%
41									
42	¹ Includes customers verified as over income or who requested to be de-enrolled.								
43	² Verification results are tied to the month initiated. Therefore, verification results may be pending due to the time permitted for a participant to respond.								

	A	B	C	D	E	F	G
1	PY 2014 CARE Annual Report						
2	CARE Table 4						
3	CARE Self-Certification and Self-Recertification Applications						
4	SOUTHERN CALIFORNIA GAS COMPANY						
5		Provided ¹	Received	Approved ²	Denied ³	Pending/ Never Completed ⁴	Duplicates ⁵
6	Total	8,907,127	563,555	424,515	31,409	38,341	69,290
7	Percentage		100.00%	75.33%	5.57%	6.80%	12.30%
8							
9	¹ An estimated number that includes customers whom were provided with CARE self-certification and self-recertification application via direct mail, email, phone, bill insert, door-to-door delivery, utility personnel, and through outreach events.						
10	² Approved includes customers who are approved through mail-in, via web, by phone, and through duplicated applications.						
11	³ Customers are denied due to not being CARE eligible, not customer of record, or not the customer's primary residence.						
12	⁴ Pending/Never Completed includes closed accounts, incomplete applications, and customers of other utilities who are not SoCalGas customers.						
13	⁵ Duplicates are customers who are already enrolled in CARE and mail in another CARE application. SoCalGas treats them as recertification applications.						

	A	B	C	D	E	F	G	H	I	J
1	PY 2014 CARE Annual Report									
2	CARE Table 5									
3	CARE Enrollment by County									
4	SOUTHERN CALIFORNIA GAS COMPANY									
5		Estimated Eligible			Total Participants			Penetration Rate		
6	County	Urban	Rural ¹	Total	Urban	Rural	Total	Urban	Rural	Total
7	Fresno	11,045	24	11,068	11,293	17	11,310	102.2%	72.2%	102.2%
8	Imperial	0	18,256	18,256	13	12,822	12,835	N/A	70.2%	70.3%
9	Kern	13,508	27,832	41,340	10,105	27,032	37,137	74.8%	97.1%	89.8%
10	Kings	22	14,221	14,243	21	13,990	14,011	96.0%	98.4%	98.4%
11	Los Angeles	992,032	2,962	994,994	830,063	1,055	831,118	83.7%	35.6%	83.5%
12	Orange	211,059	10	211,069	151,459	19	151,478	71.8%	0.0%	71.8%
13	Riverside	114,305	137,765	252,070	88,631	112,669	201,300	77.5%	81.8%	79.9%
14	San Bernardino	173,100	996	174,097	158,859	819	159,678	91.8%	82.2%	91.7%
15	San Luis Obispo	8,038	14,644	22,682	4,042	11,568	15,610	50.3%	79.0%	68.8%
16	Santa Barbara	36,363	1,408	37,770	27,049	574	27,623	74.4%	40.8%	73.1%
17	Tulare	11,301	48,408	59,709	11,503	47,176	58,679	101.8%	97.5%	98.3%
18	Ventura	58,731	2,272	61,003	45,836	1,396	47,232	78.0%	61.4%	77.4%
19	Total	1,629,504	268,799	1,898,302	1,338,874	229,137	1,568,011	82.2%	85.2%	82.6%
20										
21	¹ Rural includes zip codes classified as such according to the Goldsmith modification that was developed to identify small towns									
22	and rural areas within large metropolitan counties.									
23	Note: Data reflects Year End Enrollment numbers.									

	A	B	C	D	E	F	G	H
1	PY 2014 CARE Annual Report CARE Table 6 CARE Recertification Results SOUTHERN CALIFORNIA GAS COMPANY							
2								
3								
4								
5	2014	Total CARE Population	Participants Requested to Recertify	% of Population Total	Participants Recertified	Participants Dropped	Recertification Rate % (E/C)	% of Total Population Dropped (F/B)
6	January	1,606,546	38,685	2.41%	19,905	19,005	51.45%	1.18%
7	February	1,604,487	30,732	1.92%	18,404	12,567	59.89%	0.78%
8	March	1,600,381	38,506	2.41%	20,494	18,347	53.22%	1.15%
9	April	1,600,444	35,396	2.21%	20,298	15,459	57.35%	0.97%
10	May	1,589,127	38,601	2.43%	21,710	17,528	56.24%	1.10%
11	June	1,585,872	69,047	4.35%	36,169	33,797	52.38%	2.13%
12	July	1,588,004	38,011	2.39%	20,474	18,079	53.86%	1.14%
13	August	1,583,140	36,355	2.30%	24,432	14,128	67.20%	0.89%
14	September	1,564,293	35,005	2.24%	22,145	13,776	63.26%	0.88%
15	October	1,560,857	33,872	2.17%	20,288	14,460	59.90%	0.93%
16	November	1,565,516	27,233	1.74%	17,252	11,039	63.35%	0.71%
17	December	1,568,011	29,580	1.89%	19,534	8,913	66.04%	0.57%
18	YTD Total	1,568,011	451,023	28.76%	261,105	197,098	57.89%	12.57%

	A	B	C	D	E	F	G	H
1	PY 2014 CARE Annual Report							
2	CARE Table 7							
3	CARE Capitation Contractors							
4	SOUTHERN CALIFORNIA GAS COMPANY							
5	Contractor Name ¹	Contractor Type (Check one or more if applicable)				Enrollments		
6		Private	CBO	WMDVBE	LIHEAP	Rural	Urban	Total
7	Community Action Partnership of Orange County		X	X	X	0	0	0
8	ELA Communications Energy ED Program		X			0	0	0
9	PACE – Pacific Asian Consortium in Employment		X	X	X	0	0	0
10	Proteus, Inc.		X			0	0	0
11	Community Pantry of Hemet		X			0	0	0
12	Community Action Partnership of San Bernardino		X		X	0	0	0
13	LA Works		X			0	0	0
14	Children's Hospital of Orange County		X			0	0	0
15	The Companion Line		X			0	0	0
16	Across Amer Foundation		X			0	0	0
17	All Peoples Christian Center		X			0	0	0
18	LA County 211		X			0	0	0
19	YMCA Montebello-Commerce		X			0	0	0
20	Sr. Citizens Emergency Fund I.V., Inc.		X			0	0	0
21	Coachella Valley Housing Coalition		X			0	0	0
22	HABBM		X			0	0	0
23	Second Harvest Food Bank of Orange County		X			0	0	0
24	Southeast Community Development Corp.		X			0	0	0
25	Latino Resource Organization		X			0	0	0
26	Independent Living Center of Southern California		X			0	0	0
27	Community Action Partnership - Kern County		X			0	0	0
28	El Concilio del Condado de Ventura		X			0	0	0
29	Ventura Cty Comm Human		X			0	0	0
30	Blessed Sacrament Church		X			0	0	0
31	Starbright Management Services		X			0	0	0
32	Hermanidad Mexicana		X			0	0	0
33	CSET		X			0	0	0
34	Crest Forest Family and Community Service		X			0	0	0
35	CUI – Campesinos Unidos, Inc.		X	X	X	0	0	0
36	Veterans in Community Service		X	X	X	0	0	0
37	Chinatown Service Center		X			0	1	1
38	Koreatown Youth and Community Center		X			0	0	0
39	MEND		X			0	0	0
40	Armenian Relief Society		X			0	0	0
41	Catholic Charities of LA – Brownson House		X			0	0	0
42	BroadSpectrum		X			0	0	0
43	OCCC, Inc. (Orange County Community Center)		X			0	2	2
44	Green Light Shipping	X				0	0	0
45	APAC Service Center		X			0	19	19
46	Visalia Emergency Aid Council		X			0	0	0
47	Total Enrollments and Expenditures					0	22	22
48								
49	¹ All capitation contractors with current contracts are listed regardless of whether they have signed up customers or submitted invoices this year.							

	A	B	C	D	E	F	G	H
1	PY 2014 CARE Annual Report CARE Table 8 CARE Participants per Month SOUTHERN CALIFORNIA GAS COMPANY							
2								
3								
4								
5	2014	Gas and Electric	Gas Only	Electric Only	Total	Eligible Households	Penetration Rate	% Change ^{1, 2}
6	January	N/A	1,606,546	N/A	1,606,546	1,894,724	84.8%	0.1%
7	February	N/A	1,604,487	N/A	1,604,487	1,894,724	84.7%	-0.1%
8	March	N/A	1,600,381	N/A	1,600,381	1,894,724	84.5%	-0.3%
9	April	N/A	1,600,444	N/A	1,600,444	1,898,175	84.3%	0.0%
10	May	N/A	1,589,127	N/A	1,589,127	1,898,175	83.7%	-0.7%
11	June	N/A	1,585,872	N/A	1,585,872	1,898,175	83.5%	-0.2%
12	July	N/A	1,588,004	N/A	1,588,004	1,896,764	83.7%	0.1%
13	August	N/A	1,583,140	N/A	1,583,140	1,896,764	83.5%	-0.3%
14	September	N/A	1,564,293	N/A	1,564,293	1,896,764	82.5%	-1.2%
15	October	N/A	1,560,857	N/A	1,560,857	1,898,302	82.2%	-0.2%
16	November	N/A	1,565,516	N/A	1,565,516	1,898,302	82.5%	0.3%
17	December	N/A	1,568,011	N/A	1,568,011	1,898,302	82.6%	0.2%
18								
19	¹ Explain any monthly variance of 5% or more in the number of participants.							
20	² The SoCalGas population did not vary by a level of 5% or more in any month during 2014.							

	A	B	C	D
1	PY 2014 CARE Annual Report			
2	CARE Table 9			
3	CARE Average Monthly Usage & Bill			
4	SOUTHERN CALIFORNIA GAS COMPANY			
5	Average Monthly Gas / Electric Usage			
6	Residential Non-CARE vs. CARE Customers			
7	Customer	Gas Therms	Gas Therms	Total
8		Tier 1	Tier 2	
9	Non-CARE	24.47	8.45	32.92
10	CARE	20.83	4.72	25.55
11	Customer	Electric KWh	Electric KWh	Total
12		Tier 1	Tier 2	
13	Non-CARE	N/A	N/A	N/A
14	CARE	N/A	N/A	N/A
15				
16				
17				
18				
19				
20				
21				
22				
23				
24				

¹ Excludes master-meter usage.

	A	B	C	D	E	F
1	PY 2014 CARE Annual Report					
2	CARE Table 10					
3	CARE Surcharge & Revenue					
4	SOUTHERN CALIFORNIA GAS COMPANY					
5	Electric					
6	CARE Surcharge and Revenue Collected by Customer Class					
7	Customer Class	Average Monthly		CARE Surcharge as Percent of Bill	Total CARE Surcharge Revenue Collected	Percentage of CARE Surcharge Revenue Collected
8		CARE Surcharge	Monthly Bill			
9						
10	Residential	N/A	N/A	N/A	N/A	N/A
11	Commercial	N/A	N/A	N/A	N/A	N/A
12	Agricultural	N/A	N/A	N/A	N/A	N/A
13	Large/Indust	N/A	N/A	N/A	N/A	N/A
14						
15						
16	Gas					
17	CARE Surcharge and Revenue Collected by Customer Class					
18	Customer Class	Average Monthly		CARE Surcharge as Percent of Bill	Total CARE Surcharge Revenue Collected	Percentage of CARE Surcharge Revenue Collected
19		CARE Surcharge	Monthly Bill			
20						
21	Residential	\$0.79	\$36.74	2.15%	\$36,941,431	40.13%
22	Commercial	\$11.24	\$271.51	4.14%	\$25,155,235	27.33%
23	NG Vehicle	\$584.51	\$11,996.93	4.87%	\$3,015,467	3.28%
24	Industrial	\$128.44	\$894.26	14.36%	\$26,937,008	29.26%
25						
26	Note: Industrial includes both G-NT(D) and G-NT(T) and is net of volumes qualifying for G-COG.					

	A	B	C	D	E	F
1	PY 2014 CARE Annual Report CARE Table 11 CARE Capitation Applications SOUTHERN CALIFORNIA GAS COMPANY					
2						
3						
4						
5	Entity	Total Received	Approved	Denied	Pending/ Never Completed	Duplicate
6	Orange County CDC	0	0	0	0	0
7	ELA Communications	0	0	0	0	0
8	PACE-PacAsianConEmploy	0	0	0	0	0
9	Proteus	0	0	0	0	0
10	Cmty Pantry of Hemet	0	0	0	0	0
11	Cmty Svcs SBDO County	0	0	0	0	0
12	Childrens Hospital of OC	0	0	0	0	0
13	New Beginning Outrch Inc	0	0	0	0	0
14	Sr Citizen Emergency Fund	0	0	0	0	0
15	HABBM	0	0	0	0	0
16	2nd Harvest Food Bank OC	0	0	0	0	0
17	Latino Resrce Organizatn	0	0	0	0	0
18	Indepnt Living Center So Cal.	0	0	0	0	0
19	SoEast Comm Dev Corp	0	0	0	0	0
20	El Concilio-Cdo Ventura	0	0	0	0	0
21	Blessed Sacrament Church	0	0	0	0	0
22	Hermanadad Mexicana	0	0	0	0	0
23	Starbright Mgmt Services	0	0	0	0	0
24	Crest Forest Family Cmty	0	0	0	0	0
25	Campesinos Unidos, Inc.	0	0	0	0	0
26	Chinatown Svce Center	2	1	0	0	1
27	Meet Ea Need W / Dignity	0	0	0	0	0
28	Armenian Relief Society	0	0	0	0	0
29	Cath Char Bronson House	0	0	0	0	0
30	CSET	0	0	0	0	0
31	Orange County Comm Ctr (OCCC)	3	2	0	0	1
32	Green Light Shipping	0	0	0	0	0
33	Koreatown Youth and Comm Ctr	0	0	0	0	0
34	Apac Service Center	41	19	1	0	21
35	Visalia Emergency Aid Council	0	0	0	0	0
36	The Companion Line	0	0	0	0	0
37	Across Amer Foun	0	0	0	0	0
38	All Peoples Christian	0	0	0	0	0
39	LA Works	0	0	0	0	0
40	LA County 211	0	0	0	0	0
41	Coachella Valley Housing Coalition	0	0	0	0	0
42	TOTAL	46	22	1	0	23

	A	B
1	PY 2014 CARE Annual Report CARE Table 14 Categorical Enrollment SOUTHERN CALIFORNIA GAS COMPANY	
2		
3		
4		
5	Type of Enrollment	Number of Customers Enrolled ¹
6	Women, Infants, and Children Program (WIC)	43,074
7	Supplemental Security Income (SSI)	16,628
8	CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	57,850
9	CalWORKs/Temporary Assistance for Needy Families (TANF)	16,370
10	Tribal TANF	n/a
11	Medicaid/Medi-Cal	114,053
12	Healthy Families A&B	15,517
13	National School Lunch Program (NSLP) - Free Lunch	29,380
14	Low-income Home Energy Assistance Program (LIHEAP)	13,218
15	Bureau of Indian Affairs General Assistance	140
16	Head Start Income Eligible - (Tribal Only)	541
17	¹ Number of customers enrolled reflects categorical programs selected by customer. Please note in some case customer select more than one eligible program for a single account.	
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