

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

CALIFORNIA ALTERNATE RATES FOR ENERGY
(CARE)**

JANUARY 1, 2002 - DECEMBER 31, 2002

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CALIFORNIA ALTERNATE RATES FOR ENERGY (CARE)

CARE Residential Program

This section describes individual and submetered participants (tenants of qualifying master-meter customers) for the 2002 program reporting period.

I. PARTICIPANT INFORMATION

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

See Table 1.

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

During the 2002 program year no variances of 5% or more occurred.

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

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

For the 2002 program year reporting period, PG&E continued to use the Joint Utilities' methodology for calculating demographic CARE-eligibility rates, that was adopted in 2001 in D.01-03-028. The particulars of the calculations may be found in attachment A, "Technical Addendum: Joint-Utility Methodology for Calculating CARE Penetration" excerpted from the Joint Utilities' "Reporting Requirements Manual (RRM) Working Group Report for Low Income Assistance Programs" (R.98-07-037).¹ In summary, PG&E applies county-based commodity-specific demographic eligibility multipliers to the technically eligible meter count within that county. The product of this calculation is then added together to obtain an overall eligibility for each commodity served.

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

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

PG&E obtains a count of technically eligible meters by county and commodity. Within each commodity, there are only certain eligible rate schedules authorized to receive CARE. Customers who are ineligible for CARE are removed from the pool of technically eligible meters. For each county, the result of this filtering process provides the total technically eligible meter count to which demographic eligibility multipliers may then be applied.

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

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

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

The utilities completed an annual update of CARE eligibility estimates in July 2002, which produced similar eligibility estimates. The Commission, however, directed the utilities to continue to use the prior 2001 estimates in lieu of the July 2002 update throughout 2002. The July 2002 updated estimates were developed using 2002 AGS data (vendor data) on household income and household size that made use of available higher order Census data and non-Census economic data including Current Population Survey data.

Attachments A and B describe the Joint Utility methodology for calculating CARE penetration (filed in February 2002 for the Workshop on Penetration Rates for CARE and ULTS Programs) and the Joint Utility CARE eligibility update (filed in compliance with the directives of Interim Decision 02-07-

033 Ordering Paragraph 4(b), as modified by the Assigned Commissioner's Ruling (ACR) of December 27, 2002).

4. Describe how current CARE customers were counted.

Monthly, PG&E surveys its billing system for all customer accounts, filtering all non-CARE rates from the pool. The results are a listing, by commodity, of all participating CARE accounts.

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

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

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

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

See Table 2.1 through 2.4.

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

PG&E continued to use the 2001 CARE-eligibility demographics in 2002. These demographics were updated for 2003.

Electric-only estimated eligible: 288,365

Gas-only estimated eligible: 173,121

Combined electric/gas estimated eligible: 618,452

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

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

Applying current eligibility estimates for the general population (22.56%), 18,815 electric-only, 14,183 gas-only, and 4,884 combined electric/gas submetered tenants are eligible for CARE.

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

10,232 electric-only, 9,290 gas-only, and 3,866 combined electric/gas submetered tenants were receiving a CARE discount by year-end.

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

54% of the CARE-eligible electric-only tenants, 65% of the CARE-eligible gas-only tenants, and 79% of the CARE-eligible combined electric/gas tenants were signed up for CARE as of year-end. This represents an overall 64% submetered penetration rate.

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

During the 2002 program year, PG&E continued its year round re-certification schedule for sub-metered tenants. One issue that continued to be a problem in 2002 was insufficient billing information. The sub-metered facility may not display the CARE discount as a separate line item, making it difficult for the tenant to verify they were receiving their CARE discount. When a tenant called PG&E with questions, a CARE processor reviewed their application for certification verification.

If the tenant continues to question their bill, PG&E recommends that the tenant speak with their billing agency and/or their sub-metered facility manager for further clarification. If the tenant does not find resolution with their billing agency and/or sub-metered facility manager, then PG&E advises the tenant to contact the California Public Utilities Commission.

II. USAGE AND BILL INFORMATION

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

See Table 3.

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

See Table 4.

III. PROGRAM COSTS

A. Discount Cost

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

	<u>Electric</u>	<u>Gas</u>
Rate Discount	\$10.49	\$5.64
Avoided Surcharges	\$11.35	
Total	\$21.84	\$5.64

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

	<u>Electric</u>	<u>Gas</u>
Rate Discount	\$68,427,000	\$31,714,000
Avoided Surcharges	\$74,017,000	
Total	\$142,444,000	\$31,714,000

B. Administrative Cost

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

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

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

Outreach:

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

Regulatory Compliance:

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

Processing, Certification and Verification:

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

Billing System / Programming:
Manual Rebilling, and Programming and Billing Labor.

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

Measurement & Evaluation:
Needs Assessment Study, and Customer Satisfaction Survey.

LIAB Funding:
Both past and present funding as invoices are received.

Energy Division Staff Funding:
Both past and present funding as invoices are received.

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

Gas: \$23,295,856

Electric: -\$10,965,746

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

D.02-09-021 authorized recording all CARE costs into the CARE balancing account.

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

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

See Tables 6a and 6b.

IV. OUTREACH

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

In May 2001, the California Legislature passed SBX1-5 to respond to the effects of the California energy crisis. The bill granted one-time funding to mitigate the burden of rising electric rates on low income electric utility customers through CARE outreach. PG&E began a CARE outreach campaign in late 2001, using SBX1-5 funds supplemented by its CARE advertising budget. Throughout 2002, PG&E continued outreach expenditures under the SBX1-5 funding granted for this purpose in May 2001. PG&E expended all of its SBX1-5 funding in 2002.

Beginning in 2001, PG&E clearly defined its CARE eligible households so that it could develop a targeted outreach and education plan. PG&E learned that CARE eligible customers fall into the following demographic groups:

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

Because of the tremendous geographic and ethnic diversity of the target community, PG&E realized its CARE enrollment would be greatly enhanced by launching an integrated communications effort. PG&E, through its SBX1-5 CARE outreach subcontractors, implemented a three-pronged effort for the 2001-2002 CARE Outreach and Education Campaign:

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

2001-2002 CARE Outreach Campaign Activity Highlights

PG&E worked with Hill and Knowlton to develop and manage an integrated CARE outreach campaign in 2001-2002. The CARE campaign received several national awards and was recognized by *PR Week* for its multi-cultural outreach.

The purpose of the campaign was to significantly increase the participation of residential customers on low or limited, fixed incomes who were eligible, but not enrolled in, the state-mandated CARE program. The CARE campaign was developed and executed in two phases. The first was an intensive six-month effort over the second half of 2001. The second phase spanned the entire 2002 calendar year.

In all, the 18-month campaign consisted of activities in three major areas: community outreach, grassroots media and capitation fees.

Capitation fees were central to the campaign. Fees made it possible for PG&E to compensate third parties for assisting in the enrollment of CARE-eligible, but non-enrolled customers. This group of active supporters came to be known as Community Outreach Contractors (COCs) and constituted one of two partnership networks. The second network was less formal and was comprised of key media, retail companies, charitable organizations and government agencies serving targeted counties and communities. Participants in this support network were not contracted by PG&E and, therefore, did not receive financial compensation.

Fifteen major programs and activity areas formed the 2001-02 CARE campaign. In alphabetical order, those areas were:

African-American Program

Each segment of CARE's targeted audience had its own unique challenges and special needs. To significantly increase enrollment of African-Americans in the CARE program, Young Communications Group developed a targeted outreach program built around recruiting and engaging community-based organizations with cultural expertise as COCs.

Special collateral items were developed for the community, including a bible bookmark, poster and church fan featuring a culturally appropriate design. CARE enrollment events catering primarily to eligible African-American seniors, women and working mothers were held at churches and community centers. Incentive items and raffles were important factors in creating excitement and building attendance at events. At most events, an energy efficient refrigerator was raffled to customers that applied for CARE. A Kwanzaa event developed in partnership with SoulBeat, an African-American cable television station, took place in Oakland.

Extensive media relations were focused on African-American community newspapers and radio stations throughout PG&E's service territory. News releases focused on enrollment drives, new income guidelines and CARE COCs serving the community.

African-American customers participated in focus groups to test new educational materials and explore campaign barriers. COCs serving the

African-American community also were involved in the development of educational and enrollment materials.

Asian American Program

The Asian American community is extremely diverse in itself, with many distinct groups comprising the umbrella Asian American population segment. Therefore, primary and secondary target markets were identified based on population size, income levels and in-language preference, and developed several programs throughout the 18-month campaign to reach these markets. The Chinese and Vietnamese communities were established as the primary target markets; and the Korean, Cambodian, Lao, Hmong, Mien and Filipino communities were established as secondary target markets. Senior citizens also were targeted within these communities. Special in-language prompts were featured on the CARE toll-free line for Cantonese, Mandarin and Vietnamese callers. Collateral materials, such as fliers, were developed in seven languages (Chinese, Vietnamese, Korean, Hmong, Lao, Cambodian and Tagalog) and distributed through COCs and other channels. Culturally appropriate giveaways, such as in-language bags, calendars and paper-cut stickers, were also created specifically for new customers who applied for the CARE program at enrollment events.

Fifteen CARE enrollment events were held in conjunction with community festivals such as the Vietnamese Tet Festival and Chinese New Year and in predominantly Asian neighborhoods. A Hmong dance troupe performed at a special enrollment drive, and CARE booths were set up and staffed by COCs at the Portsmouth Square's Night Market in San Francisco's Chinatown.

Targeted media relations also was an essential part of the Asian American program. News releases in Chinese, Korean and Vietnamese were distributed and placement was secured in radio stations, television stations and newspapers. Releases focused on enrollment drives and events, new income guidelines, and those COCs serving the Asian American community. Interviews were also coordinated with PG&E spokespersons in Vietnamese, Lao, Hmong, Chinese and Korean.

Community Outreach

The CARE team strongly believed a key to the success of the CARE campaign would be to educate consumers in language, in culture and in person. Leveraging the weight of the capitation fee, the CARE team recruited, contracted and trained a diverse group of community-based organizations recognized and trusted by their constituents. A special recruitment packet was developed and distributed, and individual calls were made to enlist COCs. More than 90 organizations large and small signed on to promote the CARE program within their communities throughout the span of the campaign. Some COCs also supported other low-income energy programs of the utilities.

All COCs underwent a training course and were provided with collateral items such as T-shirts and nametags to identify themselves with CARE, and with bilingual CARE fliers and brochures to display in their organizations. A special toll-free line was set up exclusively to handle questions and offer support to

COCs. From August 2001 through December 2002, COCs enrolled more than 25,000 customers while also helping coordinate and staff community enrollment events throughout the PG&E service territory. COC representatives also served as spokespeople on public service announcements and testified before the CPUC on PG&E's CARE campaign.

In appreciation, PG&E hosted a CARE Community Outreach Contractor Awards and Recognition Luncheon in 2002, where every organization received a Certificate of Appreciation and 10 organizations were individually recognized for their enrollment efforts and overall contributions to the campaign.

Enrollment Events

One of the most effective ways for marketers and service providers to break down barriers, engage community leaders and build trust in communities is through community events. In 2001-02, the CARE team delivered 15 PG&E-sponsored enrollment events and partnered with COCs to staff CARE booths at 22 community events.

In all, the CARE team produced or was involved in major CARE enrollment drives held in San Luis Obispo, San Francisco and Alameda Counties. An eight-city CARE drive in association with Sears was held prior to the December 2001 holidays. Smaller, local events took place in Bakersfield, Fresno, Stockton, Sacramento, Oakland, East Palo Alto, San Jose, Santa Maria, Salinas and in Humboldt County. Through events, PG&E was also able to purchase and give away 54 energy efficient refrigerators to customers who otherwise may not have been able to afford them.

All segments of the target audience for the CARE campaign were reached through these events as a whole. Events were almost always supported with targeted advertising and public affairs, which helped create a halo effect for CARE and PG&E months after the events occurred.

Latino Program

As the Latino community represented the largest CARE-eligible segment of PG&E's customer base, PG&E's outreach campaign contractors developed a targeted program to meet the unique needs of the community. Media relations was a key program element. With the production of Spanish-language b-roll tape, media pitches focused on Univision and Telemundo stations, which are heavily consumed by the target audiences.

Public service announcements (PSAs) also were produced and distributed to local radio and television stations to promote special events, PG&E billing inserts, CARE guideline changes and other timely items.

PG&E's Spanish-speaking spokesperson was integrated into the campaign because of her long-standing reputation with Hispanic media and her knowledge of the issues, and she became an extremely effective voice for the CARE program.

Hispanic community and civic leaders were consulted throughout the development and implementation of the 2001-02 CARE campaign, and Hispanic customers were very involved in focus group, telephone-based and other testing

of campaign messages and materials. A large number of COCs served the targeted Hispanic community.

CARE enrollment drives in key counties were tailored with local retail and Spanish-language radio partners, and local enrollment events featured music, giveaways, food and activities for children. Outreach was conducted at such community events as Día de los Muertos, El Día de la Mujer and La Feria de la Mujer.

Education and outreach activities also were conducted in conjunction with Mexican Consulates that distributed thousands of brochures and displayed CARE posters in their lobbies, and with Catholic churches that have Spanish-language masses. Special bilingual fliers were developed to assist COCs with their education and outreach efforts.

Media Partnerships

With the CARE campaign, PG&E has effectively and efficiently used local television and radio to reach large numbers of eligible customers because television and radio are the most consumed and trusted media by low-income consumers.

In the fall of 2001, a media partnership was arranged with Univision station KFTV in Fresno. Featured were airings of PSAs by popular news anchor Lupita Lomeli, and news reports on *Arriba Valle Central*, the region's top-rated morning show. The partnership contributed greatly to a dramatic improvement in enrollment rates in the Central Valley.

In 2002, the CARE team executed numerous other media partnerships as part of the CARE campaign, including a six-month project with Spanish-language network Radio Bilingüe, featuring a series of four mini-dramas and several PSAs.

Media partnerships involving more than simple news reports also were arranged with such local television and radio stations as African-American gospel station, KDYA-AM; Stockton-based Hmong station, KJAY; and Sacramento-area Vietnamese station, KLIB.

Media Relations

News media also proved a vital channel through which to gauge public reaction, assess challenges and utilize "third-party" endorsements. When done in conjunction with grassroots paid media, special events, community outreach, billing inserts and other activities, targeted media relations demonstrably enhanced the impact of the overall campaign.

In 2001-2002, media relations was successfully used by the CARE team to broaden awareness of the low-income program among eligible customers, particularly in diverse communities. Media relations promoted CARE enrollment drives, announced new income guidelines and promoted CARE application inserts in monthly PG&E customer bills.

A b-roll package for broadcast outlets in English, Spanish and Cantonese was produced and then pitched to every television station within PG&E's service territory. It featured interviews with PG&E spokespersons, customers and COC

representatives as well as images on income guidelines, the CARE application and more.

Positive media coverage had a direct and measurable impact on calls from targeted customers to the CARE toll-free phone line.

Multicultural Collateral

While preparations were being made to launch the CARE campaign in summer 2001, it became apparent that a set of multilingual marketing materials would be necessary to educate and motivate targeted customers to apply for the CARE program through PG&E. These materials needed to be easy to read, cost-effective and communicate key messages on the benefits, eligibility requirements and application procedure to a culturally diverse and multilingual target audience. All materials would promote the CARE toll-free line.

An assortment of collateral materials was produced to assist COCs in their grassroots education and outreach efforts in 2001. These included a multilingual brochure, a matching brochure holder, bilingual English Spanish fliers, a set of fliers in Chinese, Vietnamese and Hmong, and church fans expressly for African-American churches. To strengthen the campaign's image, multilingual T-shirts, stickers, plastic bags, door hangers, banners and squeeze lights were produced and distributed to customers at local CARE enrollment events.

As the second phase of the campaign began in 2002, new materials were tested with CARE-eligible customers and COCs. With feedback from customer focus groups and revised income guidelines, a set of bold new brochures were developed. These brochures were bilingual (English-Spanish, English-Chinese and English-Vietnamese) so multigenerational families with different language preferences could learn about CARE.

The set of three bilingual brochures also incorporated a self-mailing CARE application, tips on completing the application and a blank box in which a COC could stamp its contractor number and thereby receive credit for the enrollment.

Native American Program

Although Native Americans comprise a small portion of the CARE eligible population, they are the hardest-to-reach population due, in part, to rural communities and vast dispersion throughout PG&E service territory.

PG&E worked with the California Heritage Commission to develop a packet of education and outreach materials that would be culturally meaningful. These included a unique poster and a special version of the CARE application. With a letter of support from the executive director of the Commission, PG&E mailed the packet utilizing a customized database of 200 tribal leaders, community groups and educational organizations.

A media partnership with the only Native American radio station broadcasting from a reservation, KIDE-FM, resulted in PSAs being produced and aired in rotation over a three-month period. To reach even deeper into the community, KIDE-FM sponsored CARE enrollment activities in conjunction with a basketball tournament on the Hoopa Valley Indian Reservation.

Paid Media

Grassroots paid media is one of the most cost-effective means to building awareness quickly and greatly enhances the effectiveness of other communications activities such as community outreach.

The CARE campaign opened in 2001 with billboards in low-income neighborhoods, print advertising in Chinese and Vietnamese newspapers, and radio advertising in various languages. Spanish-language CARE applications also were inserted into Hispanic community newspapers. This advertising had an immediate impact on the campaign as evidenced by a surge in targeted customer calls to the CARE toll-free line.

Following the strong 2001 media presence, paid media in 2002 was used strategically on more limited basis. Radio and television spots were produced in Cantonese, English, Hmong, Mandarin, Spanish and Vietnamese specifically to drive targeted customers to local enrollment events. Radio spots and print ads targeted the African-American community.

A radio spot featuring PG&E's popular Spanish-speaking spokesperson was developed expressly to publicize CARE applications inserted into the customer bills in March 2002.

To stimulate CARE enrollment on the Central Coast in 2002, local television spots promoting two enrollment events in San Luis Obispo were produced as PSAs in collaboration with the trusted charity, Goodwill Industries.

Public Affairs

Because distrust is a major barrier to CARE for many eligible customers, a high priority was placed on engaging respected third parties to endorse the program. Opinion leaders vary from community to community, but can include elected officials, school officials and religious leaders, among others.

PG&E took pains to educate community, civic and other opinion leaders in Sacramento and throughout PG&E service territory on the CARE program and to gain their endorsement for the 2001-02 education and outreach campaign. They were provided with CARE materials, invited to local CARE enrollment events, encouraged to declare "CARE Days" in their districts and kept informed on campaign progress via the newsletter, *Community Focus*. The support of these third parties contributed to the overall success of the campaign.

Re-certification Efforts

The CPUC requires all customers on CARE to reapply to their energy provider(s) every two years for re-certification. During the CARE outreach campaign, PG&E's CARE team learned that re-certification was seriously hindering retention and, therefore, the overall penetration rate of PG&E.

Statistics revealed 50 percent of all CARE-enrolled customers in 2001 were not reapplying for CARE. As a result, a three-phase program was developed to boost re-certification levels. In Phase I, PG&E created and managed an outbound call center to notify "at risk" customers they needed to reapply. As a result of this project, more than 35,000 PG&E customers were personally

contacted in 2001 and 2002. Those customers that requested it were re-sent the re-certification letter and form.

In Phase II, the re-certification letter was revised by the CARE team and it was adapted into the Chinese, Spanish and Vietnamese languages. To reduce duplicate applications, a “Welcome to CARE” postcard in four languages was introduced. In Phase III, early in 2003, an entirely new, bold multilingual packet for re-certification will be introduced to CARE customers.

CARE re-certification and retention rates have improved markedly as a result of each and every step.

Retail Partners

Another one of the effective ways that current and potential CARE customers were reached in 2001-2002 was through promotions and enrollment events with major retailers. The CARE team secured partnerships with Sears, Kmart, Goodwill stores and a chain of local jewelry stores catering to Hispanic consumers to help reach of CARE-eligible, but non-enrolled customers.

Among numerous activities, high-volume stores throughout the Bay Area participated in “CARE Day at Sears.” Sears and Goodwill stores offered special discounts to CARE customers, CARE was the “Blue Light Special” at Kmart stores during special enrollment days, and the Kmart store in Salinas generously donated a color television for a free drawing for PG&E customers who enrolled in CARE.

Multilingual Toll-Free Line

PG&E’s CARE campaign necessitated a single tool that could effectively educate a diverse target audience without intimidation, and at the same time provide a measurement of the campaign’s effectiveness.

A dedicated toll-free line featuring culturally appropriate, recorded information about CARE and accessible 24-hours a day from anywhere in PG&E’s territory achieved both these goals. The line was developed in the five languages that 97 percent of the eligible PG&E customers speak: Cantonese, English, Mandarin, Spanish and Vietnamese.

From the beginning, the toll-free line (1-866-PGE-CARE) offered PG&E customers answers to frequently asked questions; a list of referrals to local COCs; and an option of leaving questions or requesting a CARE application. Later, in-language prompts were added to provide detailed information on monthly CARE enrollment events and on re-certification procedures.

The dedicated CARE line, operated by a minority-owned vendor, handled approximately 7,000 calls a month and more than 17,000 CARE applications were mailed to callers as a direct result.

Workplace Initiative

Reaching, motivating and then helping customers overcome distrust and skepticism is often a multi-layered process. PG&E has reached out to customers at home through their monthly bills, at their places of worship through educational materials and where they shop through enrollment events.

In the summer of 2002, PG&E expanded its outreach efforts into the workplace because California has a very large number of service industry jobs that are filled largely by immigrants. Service industry jobs often provide hourly wages and many of these individuals fall well within CARE eligibility guidelines. To garner support of employers, PG&E asked companies to join its effort to educate customers about the benefits and availability of CARE. Participating companies received free, bilingual English and Spanish materials that included CARE paycheck stuffers, a poster for display in lunchrooms or common areas and a boilerplate article on CARE for employee newsletters.

By the end of 2002, more than 530 companies in California had been contacted about the CARE Workplace Initiative and more than 270 agreed to participate.

Other CARE Outreach Activities

Other efforts begun in 2001, but not funded through the CARE Outreach SBX1-5 Campaign activities, included a revised in-the-bill application, developed in partnership with Greenlining Institute through a memorandum of understanding and utilized in March and May billing cycles. For 2002, this design was improved to include postage paid return mailing. This revised application continues to be used for all CARE notifications in 2003.

PG&E continued to use the utility web site to promote the CARE program in 2002. As new applications became available, each was posted, in language-specific areas, in formats that allowed for easy download and printing. A *Frequently Asked Question* section accompanied each program area and links to other assistance programs were provided. Feedback from users of the web site as well as outreach partners continues to allow for improvement of the site in 2003.

Attachments C and D detail PG&E's outreach and media activities during 2002.

B. Discuss each of the following:

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

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

The single biggest measurement of the outreach campaign's success is the improvement in PG&E's CARE penetration rate. After starting the year with a 52 percent penetration rate, PG&E surpassed 68 percent by December 2002. In total, the company enrolled and re-enrolled 441,342 customers during the year.

While individual campaign elements had varying degrees of impact on call volume with the toll-free line, no single activity can easily be measured as the most effective tool for enrolling customers. The campaign was successful because the various campaign elements were integrated and complimentary. In addition to overall improvement in enrollment, PG&E noted other measurements of success:

- PG&E assembled more than 90 community-based organizations to support CARE outreach. Dozens participated in community events and together they submitted more than 25,500 applications in 2002.
- More than 125,000 calls from customers were handled in five languages by the CARE toll-free line in 16 months of service. Operated by Taget Directions Inc., a minority-owned vendor, the dedicated CARE line handled approximately 7,000 calls a month and more than 17,000 CARE applications were mailed to callers as a direct result during the 2001/2002 CARE outreach campaign.
- The CARE story was accurately reported in six languages in nearly every market within PG&E's service territory.
- Two dozen elected officials endorsed the campaign and "CARE Day" was officially proclaimed by officials in four cities. Additionally, eight CARE partners testified before the CPUC in February and acknowledged PG&E for delivering a dynamic, effective and culturally appropriate CARE campaign.

During the 2002 Program Year, the most cost-effective method of outreach was the bill-insert self-mailing CARE application, sent to over 4 million residential customers who were not taking currently participating in CARE.

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

Language: With the increasingly diverse population of California, and the wide geographic distribution of the customers within PG&E's territory, it is no surprise that language has been a barrier to enrolling customers for the CARE program over the years. In 2001, PG&E took a major step towards easing this barrier by expanding the services provided our main language customers on our own CARE toll-free phone line. For example, instead of providing an English only menu for our customers when contacting PG&E's CARE program, the new 866-PGE-CARE line has informational menus to address the most frequently asked questions in English, Spanish, Mandarin, Cantonese and Vietnamese. These languages were maintained for 2002. In 2003, PG&E will be investigating what languages are most used by low income customers in its service territory to determine whether any additional languages should be added.

Additionally, these menus direct customers seeking assistance in completing their applications to community based organizations in their area that specialize in in-language assistance. This opportunity came about as PG&E began to incorporate the unique talents of the various CBOs recruited through the SBX1-5 rapid deployment project. Participating organizations provided the zip codes served and in what languages they provided services, all used to link our customers' needs to their assistance.

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

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

Application Design: PG&E adapted a number of suggestions from public workshops as well as feedback from customers in further adapting changes to the CARE applications for 2002. Additional changes are still needed and will be incorporated in the future with an eye towards ease of completion by the customer as well as speed and accuracy of processing on PG&E's part. Several variations on the applications were used throughout the SBX1-5 campaign in 2001-2002 that allowed for specific cultural and language issues to be addressed. For example, Spanish language applications were used on the back half of a colorful flyer and distributed in a widely read weekly periodical throughout the central valley. Language used in the applications was culled to provide bullet point information and reduce the "clutter" an applicant might experience in completing the form.

Budget: In September 2002, PG&E received authorization during 2002 to record all CARE costs into the CARE balancing account, but PG&E had previously been restrained by the inability to receive balancing account treatment for administrative costs associated with CARE. This restriction left a maintenance budget of slightly more than \$1,000,000 for all administrative costs associated with CARE from 1998 through 2001. During this time, costs for marketing CARE increased dramatically. For example, a multi-lingual radio campaign designed in 1990 and targeting the metropolitan areas of Fresno and Bakersfield was successful in reaching the Spanish and Asian language markets for less than \$1,000,000. The same campaign, priced in today's markets would cost almost \$4,000,000. Only after the passing of SBX1-5 and SBX2-2 did funding relief come, allowing PG&E to pursue activities that benefited the customers and provided reimbursement for CBOs long interested in assisting PG&E in enrollment efforts. PG&E took advantage of these available funds to develop our multi-pronged outreach campaign that has dramatically increased awareness of the CARE program throughout our territory and continued that campaign in 2002.

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

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

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

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

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

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

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

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

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

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

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

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

In 2002, PG&E implemented several changes and additions to improve cost effectiveness. Due to a successful certification year in 2001, PG&E's re-certification efforts in 2003 are expected to be monumental.

In June 2002, PG&E re-designed and implemented a new re-certification application. The main design changes were in language and information required. The new re-certification application includes 4 languages: English, Spanish, Chinese and Vietnamese, making it easier for the multi-lingual customer to understand. Also, the information required was modified to a simpler format allowing the processing of re-certification applications to be more efficient

Also in 2002, PG&E re-designed its multi-language CARE brochure to include a postage paid application which was mailed to all participating Community Outreach Contractors (COC), participating workplaces, PG&E local offices and pay stations and handed out at various outreach events throughout the year.

In addition, in August 2002, PG&E created and implemented a multilingual "Congratulations" postcard. These postcards were mailed on a monthly basis to all newly certified CARE customers informing them of their enrollment in PG&E's CARE program. The expected result of this addition was a decrease in duplicate applications and customer phone calls asking if their application was received.

Lastly, in November 2002, a rural "door to door" canvas campaign of the Salinas area was performed by the Greenlining Institute, a participating Community Outreach Contractor. Over 1,000 applications were submitted and 800 new customers were certified through this effort.

V. PROCESSING CARE APPLICATIONS

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

1. *Provide the total number of third-party CARE applications received, approved, denied, pending/ incomplete, or duplicates in the reporting period.*

See Table 7.

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

See Table 8.

3. *Provide a table showing the number of customers removed from CARE by month due to the recertification process. (NOTE: Customers may be removed due to a variety of reasons including: non-response to a request to recertify, failure to complete the application process, ineligibility, or by customer request due to changed eligibility status.)*

See Table 9.

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

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

The tenants are given 90 days to complete their application and return it to PG&E. Tenants failing to return the application within 90 days are removed from the sub-meter CARE listing for the facility and a revised listing is mailed to the manager/landlord notifying them of the change in the tenant's eligibility.

B. Processing Random Post-Enrollment Verification Applications

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

See Table 9.

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

See Table 10.

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

PG&E had no third party contracts perform these duties in 2002. All these functions were performed by the CARE Processing Center within PG&E.

VI. PROGRAM MANAGEMENT

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

Cost recovery presented a challenge to PG&E for much of 2002 in terms of its ability to make plans for effective outreach and marketing efforts. However, in September, D.02-09-021 authorized balancing account treatment for all CARE expenses. Without a recovery mechanism, the utility had been reluctant to commit the costly resources necessary to implement an effective outreach and marketing effort. Nevertheless, PG&E fielded a successful outreach campaign during 2002, increasing penetration from 52% to 68% by year-end. PG&E is continuing its outreach efforts into 2003.

CARE Expansion Program

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

I. PARTICIPANT INFORMATION

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

See Tables 11A and 11B.

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

38,683 tenants resided within facilities receiving the CARE discount by December 31, 2002. This information is not available by energy source. The resulting numbers were representative of the total number of residents housed in all facilities, both residential and commercial, and for both energy commodities.

II. USAGE INFORMATION

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

See Table 12.

III. PROGRAM COSTS

A. Administrative Cost

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

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

B. Discount Information

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

Electric: \$521 Gas: \$125

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

Electric: \$1,550 Gas: \$877

IV. OUTREACH

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

During the reporting period, PG&E worked with local organizations as well as external relations to further advertise the programs to non-profits and agricultural employee housing facilities.

Additionally, working dialogs were established with several umbrella organizations representing facilities that might qualify for non-profit discounts, including the California Association of Nonprofits. The joint utilities educated these organizations which led to possible enrollments for our efforts. PG&E invited hundreds of non-profit organizations to energy briefings to discuss cost savings the non-profits could gain from participation in various utility programs, including CARE. Energy briefing events were held throughout PG&E's service territory, in Fresno, Santa Cruz/Watsonville, San Luis Obispo, Santa Rosa and San Jose.

PG&E continued the utility web site in 2002. As new applications became available, each was posted, in language-specific areas, in formats that allowed for easy download and printing. A *Frequently Asked Question* section accompanied each program area and links to other assistance programs were provided. Feedback from users of the web site as well as outreach partners continues to allow for improvement of the site in 2003.

B. *Discuss each of the following:*

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

Word of mouth continues to be the most effective outreach method available for the expanded programs. Non-profit participants hear about the program through another current participant, and inquired as to the possibility for their own eligibility. Moreover, consistent communication between the non-profit organizations and PG&E helped ensure timely certification of eligible facilities.

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

PG&E borders two utilities in a small geographic location of the service territory. There is no formal agreement for electronic data exchange of the

type developed between Southern California Edison and Southern California Gas companies, although discussions are currently underway.

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

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

There continues to be confusion over the eligibility criteria for the expanded programs. Often times, customers do not understand the definitions of “Group Living Facility” or “Agricultural Employee Housing”. For example, the CARE Program received a number of non-profit applications during 2002 that were actually for single-family customers. Because more than one family was living on the premises, and therefore on the same PG&E account, the customer believed they should apply for the group-living facility program. In each of these cases, the misconception was explained and the customer enrolled in the correct program.

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

There is also continuing confusion regarding the customer’s tax exemption status. Many customers believe that if they hold 501(c)(3) tax exemption status they also automatically qualify for the CARE Expansion program. In order to qualify for non-profit group living facility status under the CARE Expansion program, residential services must also account for 70% of the facilities’ energy usage, and the on-site social services must be provided to facility residents. In these cases, the qualifications are explained to the customer to help determine their eligibility.

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

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

Although word of mouth and bill inserts continue to be effective methods of outreach for the expanded programs, more can be done to attract new eligible non-profit organizations. In 2003, PG&E plans to create a targeted outreach program for our non-profit homeless shelters, group living facilities, and hospices.

V. PROCESSING CARE APPLICATIONS

A. Processing Self-Certification and Self-Recertification Applications

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

See Table 13.

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

See Table 13.

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

PG&E had no third party contracts to perform these duties in 2002. All these functions were performed by the CARE Processing Center within PG&E.

VI. PROGRAM MANAGEMENT

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

The greatest challenge in 2002 was educating the non-profit customer regarding PG&E's annual re-certification process. The first quarter of 2002 was dedicated to notifying and communicating with non-profit customers about their upcoming annual re-certification. The second quarter of 2002 was committed to

contacting the non-profit customers dropped due to failure to re-certify. By August 2002, over 300 de-certified customers were reinstated due to the continued communication efforts of PG&E's CARE processors.

Tables

TABLE 1		
RESIDENTIAL CARE PROGRAM		
Customers by Month¹		
2002	CARE Customers	Percentage Change
January	557,493	2.26%
February	570,222	2.28%
March	594,721	4.30%
April	620,869	4.40%
May	636,531	2.52%
June	648,017	1.80%
July	659,891	1.83%
August	674,508	2.22%
September	683,946	1.40%
October	692,932	1.31%
November	722,748	4.30%
December	731,108	1.16%

1 Total individual and submetered.

TABLE 2.1			
CARE RESIDENTIAL PENETRATION RATE			
Electric-Only Customers			
2002 Quarter Ending	CARE Residential Electric-Only Customers	CARE-Eligible Electric-Only Customers	CARE Electric- Only Customers Penetration Rate
March 31	143,156	288,365	50%
June 30	156,643	288,365	54%
September 30	165,326	288,365	57%
December 31	176,735	288,365	61%

TABLE 2.2			
CARE RESIDENTIAL PENETRATION RATE			
Gas-Only Customers			
2002 Quarter Ending	CARE Residential Gas-Only Customers	CARE-Eligible Gas-Only Customers	CARE Gas-Only Customer Penetration Rate
March 31	80,280	173,121	46%
June 30	87,860	173,121	51%
September 30	90,209	173,121	52%
December 31	97,072	173,121	56%

TABLE 2.3			
CARE RESIDENTIAL PENETRATION RATE			
Gas and Electric (Dual-Commodity) Customers			
2002 Quarter Ending	CARE Residential Dual-Commodity Customers	CARE-Eligible Dual-Commodity Customers	CARE Dual-Commodity Customer Penetration Rate
March 31	371,285	618,452	60%
June 30	403,514	618,452	65%
September 30	428,411	618,452	69%
December 31	457,301	618,452	74%

TABLE 2.4			
CARE RESIDENTIAL PENETRATION RATE			
Households			
2002 Quarter Ending	CARE Residential Households	CARE-Eligible Households	CARE Household Penetration Rate
March 31	594,721	1,079,938	55%
June 30	648,017	1,079,938	60%
September 30	683,946	1,079,938	63%
December 31	731,108	1,079,938	68%

TABLE 3			
AVERAGE MONTHLY GAS / ELECTRIC USAGE Residential Non-CARE vs. CARE Customers¹			
Customer	Gas Therms Tier 1	Gas Therms Tier 2	Total
Non-CARE	26.64	12.17	38.81
CARE	27.37	8.65	36.02
Customer	Electric KWh Tier 1	Electric KWh Tier 2	Total
Non-CARE	324.5	195.28	519.78
CARE	339.83	130.04	469.87

1 Excludes master-meter usage.

TABLE 4		
AVERAGE MONTHLY GAS / ELECTRIC BILL Residential Non-CARE vs. CARE Customers¹		
(Dollars per Customer)		
Customer	Gas	Electric
Non-CARE	\$25.81	\$77.45
CARE	\$18.08	\$40.62

1 Excludes master-meter usage.

Table 5A							
Standardized CARE Administrative Cost Reporting Categories							
2002 Cost in Dollars							
CARE Program	CARE Base Program			SBX1 5			Total
	Electric	Gas	Total	Electric	Gas	Total	
Outreach							
- Capitation Fees	91,532	48,856	140,388	73,187	39,409	112,596	252,984
- Other Outreach	1,433,107	727,410	2,160,517	969,819	522,210	1,492,029	3,652,546
- Mass Media	201,031	107,976	309,007	95,953	51,667	147,620	456,627
Total Outreach	1,725,670	884,242	2,609,912	1,138,959	613,286	1,752,245	4,362,157
Processing/Certification/ Verification	580,041	220,340	800,381	259,356	139,653	399,009	1,199,390
Billing System /Programming	126	44	170	0	0	0	170
CARE Outreach Pilot	0	0	0	0	0	0	0
Measurement & Evaluation	0	0	0	0	0	0	0
Regulatory Compliance	166,578	59,375	225,953	0	0	0	225,953
Other Administration	241,290	102,154	343,444	20,690	11,141	31,831	375,275
Indirect Costs (P&B)	3,899	1,529	5,428	n/a	n/a	n/a	5,428
Oversight Costs							
- LIOB Start-up		0	0	0	0	0	0
- LIOB PY Past Year	0	0	0	0	0	0	0
- LIOB PY Present Year	0	0	0	0	0	0	0
- CPUC Energy Division	59,299	31,930	91,229	0	0	0	91,229
Total Oversight Costs	59,299	31,930	91,229	0	0	0	91,229
							0
TOTAL ADMINISTRATION COSTS	2,776,902	1,299,615	4,076,518	1,419,005	764,080	2,183,085	6,259,603
CARE Rate Discount	68,427,000	31,714,000	100,141,000	0	0	0	100,141,000
Avoided Surcharges	74,017,000	0	74,017,000	0	0	0	74,017,000
Service Establishment Charge Discount	0	0	0	0	0	0	0
							0
TOTAL PROGRAM COSTS (INCL CUSTOMER DISCOUNTS)	145,220,902	33,013,615	178,234,518	1,419,005	764,080	2,183,085	180,417,603

Table 5B	
CARE Expansion Administrative Cost Reporting	
Annual Costs in Dollars	
Category	Expenditure
Outreach	\$0
Regulatory Compliance	\$0
Processing/Certification/Verification	\$105,758
Billing System / Programming	\$0
General Administration	\$2,274
Measurement & Evaluation	\$0
LIAB Funding	\$0
Energy Division Staff Funding	\$0
Total Programs Costs	\$108,032

TABLE 6A -ELECTRIC					
CARE SURCHARGE AND REVENUE COLLECTED BY CUSTOMER CLASS					
Customer Class	Average Monthly		CARE Surcharge as Percent of Bill	Total CARE Surcharge Revenue Collected	Percentage of CARE Surcharge Revenue Collected
	CARE Surcharge	Monthly Bill			
Residential*	\$.41	\$76.83	0.53%	\$18,101,688	33.67%
Commercial	\$3.94	\$767.00	0.51%	\$22,888,238	42.58%
Agricultural	\$3.08	\$561.80	0.55%	\$2,908,521	5.41%
Large/Indust	\$676.96	\$83,611.12	0.81%	\$9,862,006	18.34%

* Excludes CARE customers

TABLE 6B - GAS					
CARE SURCHARGE AND REVENUE COLLECTED BY CUSTOMER CLASS					
Customer Class	Average Monthly		CARE Surcharge as Percent of Bill	Total CARE Surcharge Revenue Collected	Percentage of CARE Surcharge Revenue Collected
	CARE Surcharge	Monthly Bill			
Residential	\$0.32	\$32.45	0.98%	\$12,662,933	44.0%
Commercial	\$2.32	\$206.24	1.13%	\$5,840,487	20.3%
Industrial	\$442.20	\$2,657	16.64%	\$10,294,737	35.7%

TABLE 7					
CARE Community Outreach Project					
January 1, 2002 through December 31, 2002					
Entity	CARE Applications Submitted				
	Received	Approved	Denied	Pending/ Never Completed	Duplicates
No Contract Third-Parties	1,400	1,342	32	26	841
Amandela Project	30	30	0	0	11
Asian, Inc.	8,157	7,548	267	342	3,518
Aunt Cherie's Home	22	22	0	0	5
Black Women Organized for Educational Development (B.W.O.E.D.)	21	19	1	1	8
Cambodian Community of Stockton	96	89	1	6	32
Chapa-de Indian Health Program, Inc.	8	8	0	0	3
Chinese Newcomers Service Center	33	31	0	2	10
Community Action Board of Santa Cruz	1,858	1,787	26	45	494
Community Resource Project, Inc.	1,517	1,440	10	67	157
Ebony Counseling Center	194	184	2	8	61
El Concilio Of San Mateo County	373	361	2	10	61
Familia Center	7	7	0	0	2
Fresno Center for New Americans	108	104	1	3	40
Korean Center	8	7	0	1	1
Korean Community Center of the East Bay	13	13	0	0	2
Lao Family Community of Fresno	201	181	2	18	88
Lao Khmu Association	198	189	3	6	69
Madera County Community Action Agency, Inc.	144	134	3	7	7
Law Foundation of Silicon Valley	6	5	0	1	1
Network for Elders	5	5	0	0	3
Oakland Citizens Committee for Urban Renewal (O.C.C.U.R.)	654	602	19	33	131
Sacramento Lao Family Community	57	53	1	3	22
Self-Help for the Elderly	49	47	0	2	16
Spanish Speaking Unity Council	782	764	8	10	204
Suscol Inter Tribal Council	86	76	4	6	27
American Viet League	36	34	2	0	3
Asian Resources	385	342	10	33	113
Bibleview Baptist Church	61	56	0	5	23
California Human Development Corporation	1,501	1,226	221	54	315
Center for Independence of the Disabled	1	1	0	0	0
Central Coast Center for Independent Living	28	27	0	1	9
Central Valley Opportunity Center	1,611	1,529	23	59	351
Centro La Familia Advocacy Services	309	279	4	26	126

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Christ Temple Community Church	28	27	1	0	7
Coalition of Rural Pueblos-Economic Development	24	23	0	1	9
Congress Of California Seniors Education & Research Fund	138	87	8	43	39
Disability Resource Agency for Independent Living	7	5	0	2	1
Familia Unidas	96	92	4	0	29
Family Bridges	156	147	5	4	59
Filipino American Chamber of Commerce of Santa Clara County, Inc.	62	42	10	10	16
The Greenlining Institute	3,297	2,832	170	295	896
Merced Lao Family Community Inc.	220	214	1	5	27
North Peninsula Neighborhood Services	181	169	3	9	40
Plumas County Community Development Commission	76	67	4	5	15
Redwood Community Action Agency	245	232	3	10	38
Senior Outreach Services	18	17	1	0	7
Volunteer Center Of Sonoma County	105	92	6	7	17
West County Community Services	73	68	1	4	5
Alameda County Community Food Bank	109	104	1	4	47
Bridge Housing Corporation	31	31	0	0	20
Charles P. Foster Foundation	606	548	26	32	142
Foster Grandparent and Senior Companion	1	1	0	0	0
Hmong American Women Associates	25	23	0	2	10
Lao Family Community Development	16	15	0	1	4
Lao Family Community of Stockton	1	1	0	0	0
Yuba Sutter Legal Center	95	94	0	1	44
Vineyard Worker's Services	8	7	0	1	2
Center for Training and Careers	18	15	0	3	4
Shasta Union Elementary - Healthy Start	3	3	0	0	1
F.O.O.D. Inc.	24	23	1	0	1
Elder Abuse Prevention	10	9	1	0	1
San Francisco Community Power Cooperative	61	58	1	2	24
Ecoventure	3	3	0	0	1
American Synergy	226	59	159	8	22
God Financial Plan, Inc.	157	144	1	12	48
Century Energy Services LLC	361	322	5	34	47
Korean American Community Services Inc.	57	57	0	0	17
West Bay Pilipino Multi-Service Center	3	2	0	1	1
CDS Communications	49	48	0	1	15
West Coast Valet Service	301	292	1	8	156
Goodwill Industries of Santa Cruz, Monterey & San Luis Obispo Counties	804	770	10	24	171
Airport Neighbors United Inc.	70	55	4	11	14
California Workforce and Energy Services	77	75	0	2	17
Council for the Spanish Speaking	120	117	0	3	42

Immigrant Resettlement and Cultural Center, Inc.	19	19	0	0	8
RetroTech, Inc.	1,689	1,626	17	46	167
Winegard Energy	9,794	9,249	79	466	1,043
Catholic Charities of the East Bay	4	3	1	0	1
Council of Churches of Santa Clara County	1	1	0	0	1
Foothill Volunteer Center	33	32	0	1	16
Slavic Community Center of Sacramento	133	127	3	3	90
CARECEN Family Services Program	267	252	4	11	53
Total	39,861	36,841	1,173	1,847	10,189
Percentage	100%	92%	3%	5%	26%

* Duplicates are also considered Approved, so the total will not add up to 100%.

* Number of Approved will differ from what was reported in Table 8 of the Monthly RD Reports as Duplicates are not considered Approved in that table.

TABLE 8						
CARE Self-Certification and Self-Recertification Applications¹						
	Provided	Received	Approved	Denied	Pending/Never Completed	Duplicates
Total	604,368	493,159	441,342	8,071	43,746	55,797
Percentage	100%	82%	89%	2%	9%	11%

* Duplicates are counted as Approved as well, so the total will not add up to 100%.

1 Includes submetered customers.

TABLE 9			
RESIDENTIAL CARE PROGRAM			
Customers¹ Removed by Month through Recertification and Post-Enrollment Verification			
2002	Recertification	Post-Enrollment Verification	Total
January	3,038	137	3,175
February	3,645	318	3,963
March	5,210	274	5,484
April	2,366	363	2,729
May	5,421	314	5,735
June	5,630	203	5,833
July	4,859	397	5,256
August	5,564	280	5,844
September	3,327	167	3,494
October	2,691	236	2,927
November	3,189	141	3,330
December	0	75	75
Total	44,940	2,905	47,845

* Due to an accounting system change, all customers due to recertify in September were automatically recertified. Therefore, no customers were removed in December due to failure to recertify.

1 Total individual and submetered.

TABLE 10						
CARE Random Post-Enrollment Verification Applications						
	Mailed	Received	Approved	Denied	Pending/Never Completed	Duplicates
Total	8,949	6,060	6,044	16	2,889	0
Percentage	100.00%	67.72%	67.54%	0.18%	32.28%	0%

* All applications selected for Random Post-Enrollment Verification are screened so that Duplicates are not included in the process.

TABLE 11 A			
CARE EXPANSION PROGRAM Participating Facilities by Month (Gas)			
2002	CARE Residential Facilities	CARE Commercial Facilities	Total
January	956	323	1279
February	969	339	1308
March	981	366	1347
April	1041	374	1415
May	716	263	979
June	887	338	1225
July	990	356	1346
August	1106	380	1486
September	1164	400	1564
October	1183	411	1594
November	1245	444	1689
December	1288	480	1768

TABLE 11B			
CARE EXPANSION PROGRAM Participating Facilities by Month (Electric)			
2002	CARE Residential Facilities	CARE Commercial Facilities	Total
January	1007	376	1383
February	1088	386	1474
March	1132	404	1536
April	1201	410	1611
May	808	291	1099
June	1006	372	1378
July	1123	392	1515
August	1238	427	1665
September	1458	445	1903
October	1357	455	1812
November	1390	480	1870
December	1433	516	1949

TABLE 12		
CARE EXPANSION PROGRAM		
Average Monthly Gas / Electric Usage¹		
	Gas	Electric
Customer	Therms	KWh
Residential Facilities	641	1,830
Commercial Facilities	598	6,577

1 Excludes master meter usage.

TABLE 13					
CARE EXPANSION PROGRAM					
CARE Outreach Pilot, Other Outreach, and Utility					
CARE Applications Sent By Third Parties					
Entity	Received	Approved	Denied	Pending/Never Completed	Duplicates
Third-Parties	0	0	0	0	0
Utility	2,092	1,933	151	8	0
Total	2,092	1,933	151	8	0
Percentage	100.00%	92.40%	7.22%	0.38%	0.00%

ATTACHMENT A

TECHNICAL ADDENDUM: JOINT-UTILITY METHODOLOGY FOR CALCULATING CARE PENETRATION

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

February 6, 2002

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Joint-Utility Methodology for Calculating CARE Penetration: Technical Description

INTRODUCTION

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

Objective of the Method

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

Major Features of the Method

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

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

Description of THE METHOD

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

Core Process

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

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

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

The second table, Table 2, is also 14 x 6, and its cells show, for every corresponding cell in Table 1, the proportion of households that would have been program eligible based on current-year dollars. In all but six or seven cells, the proportion of eligible households equals either 1 (i.e., all households are eligible) or 0 (i.e., no households are eligible). For one cell in each household size group 1-5, and for one or two cells in the household size group 6+, some households will be above and some below the size/income threshold for CARE, so that the proportion in the cell equals a value between 0 and 1.⁴ Note that Table 2 can be constructed to reflect CARE, LIEE, or any other program eligibility standard. For example, with respect to the LIEE program, we have constructed an alternative, which gives the proportion of households that are eligible at either the 175% eligibility level or the 200% eligibility level applicable where the head is age 60 or work-prevented.

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

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

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

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

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

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

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

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

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

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

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

How the Matrices Used in the Core Process are Produced

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

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

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

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

USING THE ESTIMATES

Calculating Eligible Utility-Served Households Per CUC

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

Deriving Urban/Rural Shares of CUC Eligibility

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

Utility or Study-Specific Uses

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

DOCUMENTATION/STREAMLINING/SENSITIVITY TESTING/VALIDATION

The second phase of the CARE eligibility estimation project will:

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

Joint-Utility Methodology for Calculating CARE Penetration: Example Distributions

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

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

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

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

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

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

Technical Definitions

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

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

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

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

Data Sources

Key sources

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

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

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

AGS2000, 2001, and 2005 (Vendor Data)

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

Utility Data on Technical Eligibility

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

MABLE Tables

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

California CPI Data

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

The Rural Health Council (RHC)/Zipinfo Tables

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

Secondary sources

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

Claritas

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

SCAG

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

CENSUS Interim Models

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

HUD Data

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

ATTACHMENT B

TECHNICAL ADDENDUM: JOINT-UTILITY CARE ELIGIBILITY UPDATE

**Filed in
PG&E's 21st Rapid Deployment Monthly Status Report,
February 21, 2003**

Joint Utility CARE Eligibility Update

In Interim Decision D.02-07-033, Ordering Paragraph 4b, the Commission ordered the following:

“Pacific Gas and Electric Company (PG&E), Southern California Edison Company (SCE), San Diego Gas & Electric Company (SDG&E), and Southern California Gas Company (SoCal), collectively referred to as "the utilities", shall make the following improvements to the methodology adopted in D.01-03-028 for calculating CARE penetration rates:

b. Order and utilize the special tabulations of 2000 Census data as soon as they are available in Fall 2002 to update CARE penetration rates.... As described in this decision, they shall update the number of eligible customers in their service territories using the 2000 Census data required under (b) above with their January, 2003 status report. The report should present a calculation of penetration rates that reflects this updated information and the new enrollments due to automatic enrollment, to date.”

In a subsequent Assigned Commissioner’s Ruling (ACR) issued on December 27, 2002, the Commission modified the directives of Ordering Paragraph 4b of D.02-07-033 as follows, given that special tabulations data were not available as expected:

“The utilities shall include with their February 2003 rapid deployment status reports, due February 21, 2003, updated numbers of CARE-eligible customers in their service territories using 2000 Census data from Summary File 3. The utilities shall include a detailed calculation of the updated penetration rates, along with a narrative describing any differences between the updated and current penetration rates.”

Accordingly, the following discussion explains the differences between the 2001 penetration rate estimates and the updated (2002) penetration rate estimates filed with the February 2003 Rapid Deployment status reports. The updated estimates rely on demographic eligibility proportions that incorporate SF3 block group level data describing the year 2000 distribution of 1999 incomes, with implicit adjustments for CPI changes between 1999 and 2002.

DISCUSSION

Using the Joint Utility CARE methodology for estimating demographic eligibility adopted in D.01-03-028, the utilities have updated the CARE eligibility and penetration rate estimates. The results of this update are filed with each utility's respective February 2003 Rapid Deployment status report. Differences in data used for the 2001 and 2002 estimates are detailed below, along with an explanation for the differences in observed penetration rates between the two years.

Data Differences

The Joint Utility Methodology for estimating CARE penetration is designed to use current-year estimates of household income and household size obtained from a respected data vendor to estimate eligibility. In 2001, the utilities used 2001 estimates of household size and household income obtained from Applied Geographic Systems (AGS) to estimate demographic eligibility (the proportion of all customers within a given utility service area who satisfy the household size and income criteria for the CARE program). The utilities applied these demographic eligibility estimates to counts of technically eligible meters and sub-meters (counts of the number of customers with a qualified meter or sub-meter) to determine the estimated number of customers who are both demographically and technically eligible for CARE. This information is then used to calculate the estimated penetration rate by utility, commodity (fuel type), and county.¹ Per the December 27, 2002 ACR, the Commission ordered the utilities to use Census SF3 Income data to update the CARE estimates for 2002. Given that Census data is based on 1999 reported incomes, this means that the updated eligibility estimates filed herein are developed using current-year (2002) estimates of household size obtained from AGS and an implicitly adjusted 1999 distribution of household income obtained from Census SF3 income data.

While the most ideal circumstance would have been to use current-year (2002) vendor data that incorporated Census SF3 income data,² this data was not available from data vendors. However, the current-year (2002) estimates produced using Census SF3 income data, as required by the Commission, do provide reasonable estimates of eligibility throughout the state and make use of the most current Census information made available to date. Thus, these estimates reasonably can be used as an indication of the utilities' progress in enrolling all customers that are willing to participate in CARE. Essentially, for each utility, fuel type, and county, block group data are aggregated to provide a current-year (2002) estimate of the household size distribution, and a current-year estimate of the household income distribution. These are used to develop an adjusted household size by household income *matrix* estimated for the current year. Note that, in compliance with the ACR dated December 27, 2002, the current-year estimate of the household income distribution assumes no changes since 1999 in the shape of the real income distribution – only moderate changes in the number of households existing in these block groups. It would be preferable to proceed with future estimates using small area estimates (from data vendors) that incorporate 1999 income distributions (from the 2000 Census), CPI changes, and real income distribution changes tracked by demographic data vendors, rather than implicitly accepting a real

income distribution from 1999 as per our necessary response to the December 27th ACR.

Differences in Estimated Eligibility

Sensitivity analyses conducted informally after the utilities completed their annual update of CARE eligibility estimates in July 2002,³ indicated that roughly 90% of the increase in eligibility (from 2001 to the July 2002 estimates) is due to changes in vendor data; and, roughly 10% of the increase in eligibility is due to the relative aggressiveness of the increase in CARE guidelines for 2002. Consider, first, the portion of the increase due to changes in vendor data.

The Joint Utility methodology for estimating CARE eligibility makes use of current-year demographic data obtained from data vendors such as AGS or Claritas.⁴ These are respectable firms that provide demographic data of all types that are used in many applications. However, given that, in 2001, we were in the 12th intercensal year (the time between different Censuses when no new demographic data is available), the utilities were aware that differences could have emerged in estimates of household income distributions between data firms as well as between what the data vendors estimate and what would be shown in Census 2000 results. As such, the utilities recommended conducting sensitivity analyses to see the impact of using estimates of current-year (2001) household income and household size distributions obtained from one data vendor compared to another. The objective would have been to forewarn any potential changes that might be forthcoming once vendors adjusted their estimates of household income and household size distributions as they incorporated data from Census 2000. The Commission later ruled, in D.02-07-033, that these tests were not warranted given that the data vendor selected was a respected firm.

We have since learned through simple data analyses that AGS had a more optimistic view of household income distributions in 2001 than did Claritas and the 2000 Census data. Accordingly, using Census SF3 data to estimate eligibility results in a marked increase in eligibility than what was estimated in 2001.⁵ The utilities caution, however, against concluding that the decision to use data on household income and household size distributions obtained from vendor incorporation of Census 2000 and more recent economic data is a mistake. Rather, the key point is to realize that whenever we are in the intercensal period, no matter which vendor is used, estimates of household income and household size distributions can be expected to deviate somewhat from actual realities simply because sufficient data is not available to derive more accurate estimates. After data vendors incorporate all of the detailed Census 2000 data (*i.e.*, once data vendors fully incorporate all higher-order Census 2000 data and Census SF3 income data and use this data to derive current-year estimates of household income and household size distributions for 2003 and beyond), we can expect more consistent estimates of these distributions for use in future updates. As time continues and we enter the next intercensal period, once again, we will see a divergence in the estimated distributions between vendor firms until the next Census is completed and made publicly available. However, such divergences will be lessened to the extent that more

interim Census products like the American Community Survey are available to demographic vendors than in previous decades.

With respect to the portion of the increase due to changes in the eligibility guidelines, the Joint Utility Methodology incorporates the current-year's mid-year Consumer Price Index (CPI) estimate obtained from the California Department of Finance in estimating demographic eligibility rates. The California CPI was specifically used so that changes in eligibility would reflect changes in California realities – the task of an empirical effort. In contrast, the growth factor that the Commission applied to the eligibility guidelines for 2002 was based on a lagged change in the *national* CPI. For the period in question, the changes that occurred nationally were greater than the changes that occurred in California; therefore, CARE guidelines were increased more aggressively than the corresponding change in California incomes. As such, more individuals qualify for CARE in 2002 than otherwise would have, had the growth factor applied to eligibility

guidelines been based on changes in the California CPI.⁶ This difference in growth factors used (and, thus, the consequent aggressiveness of the increase in CARE guidelines) accounts for about 10% of the increase in eligibility observed between 2001 and 2002.

ATTACHMENT C

CARE Leveraging and Outreach Initiatives

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CARE Initiative (A)	Summary (B)	Timeline (C)	Status (D)
Leveraging and Outreach			
CARE Rapid Deployment Campaign	Working with a contractor to put together a comprehensive CARE plan including specific programs targeted for: African Americans, agricultural workers, Asian Pacific Americans, Latinos, Native Americans, English-language customers, and PG&E employees.	June 2001 - December 2002	On-Going
CARE Program Internet Sub-Site	All applications and information regarding the current CARE programs, including information in Spanish, Chinese and Vietnamese, are available electronically at www.pge.com/care . Information regarding the SBX1 5 Capitation project is also posted on the site.	Aug-01	On-Going
CARE Toll-Free Line	PG&E launched a new information toll-free line for customers, 1-866-PGE-CARE. The line provides in-depth information about CARE to callers in five languages (Cantonese, English, Mandarin, Spanish and Vietnamese). The line also provides callers with local community organizations that can provide application assistance.	Aug-01	On-Going
CARE Educational Materials	PG&E introduced a new CARE outreach brochure and table top display to COCs and community leaders. The colorful brochures provide information in four languages (Chinese, English, Spanish and Vietnamese) and encourage readers to call CARE's new toll-free line 1-866-PGE-CARE. Brochures were shipped to COCs, pay stations and elected officials across the service territory to distribute to the community.	Aug. 23	On-Going
CARE Educational Outreach	Identified other potential low-income groups for partnerships (i.e., senior citizens associations & veterans' associations). Distributed in-language flyers and brochures to prospective school contractors.	Oct-01	On-Going
PG&E Launches Out-Bound Call Center	In effort to re-enroll PG&E customers who need to recertify their CARE applications, PG&E launched an outbound Call Center. PG&E is contacting nearly 20,000 PG&E customers who are scheduled to drop from the CARE program this fall.	Nov-01	On-Going
California Indian/Native American Database	To reach out to the thousands of California Indian/Native American households in its service territory, PG&E developed a database of more than 175 tribal councils, organizations and community groups service this population.	Nov-01	On-Going
CARE Toll-Free Line	PG&E's toll-free line has proven to be an effective educational tool for customers. In just 16 weeks, the line has logged 36,000 calls in five languages (Cantonese, English, Mandarin, Spanish and Vietnamese). More than 5,000 callers have requested CARE applications through the toll-free line and 3,000 have been referred to CARE community contractors via the line.	Dec-01	On-Going
CARE Outbound Call Center	PG&E begins calling another 11,000 CARE customers scheduled to renew their discounts in February to make they are not displaced from the program.	Dec-01	On-Going
Community Outreach	PG&E approved 10 new Community Outreach Contractors to grassroots outreach program.	Jan-02	Completed
Community Outreach	PG&E extended all Community Outreach Contractors contracts through January 15, 2003, extending the original contract for 13 months	Jan-02	Completed
CARE Outbound Call Center	PG&E begins calling another 18,000 CARE customers scheduled to renew their discounts in the next few months to make they are not displaced from the program.	Jan-02	On-Going
CARE Toll-Free Line	In order to make the toll-free line a more valuable tool, PG&E is adding prompts for upcoming CARE events and recertification information	Jan-02	On-Going
CARE COC Training	Trained 11 COCs via conference call.	Jan-02	Completed
CARE Toll-Free Line	Added CARE Events prompt to toll-free line which gives information about upcoming events and will be updated monthly	Jan-02	Completed
CARE Toll-Free Line	Added Recertification prompt which gives information about the CARE recertification process	Feb-02	Completed
CARE Toll-Free Line	Re-recorded Spanish, Cantonese and Mandarin sections of the toll-free line	Feb-02	Completed
CARE Day in San Luis Obispo County	PG&E partnered with San Luis Obispo County Goodwill stores to host CARE Day in San Luis Obispo County in the five county stores. The enrollment event featured two refrigerator giveaways and a 20% discount on Goodwill purchases	Feb-02	Completed
CARE Day in San Luis Obispo County	Developed and distributed CARE program fliers and posters for distribution at Goodwill stores	Feb-02	Completed
CARE Day in San Luis Obispo County	Enrolled over 400 customers in the CARE program at 5 different Goodwill stores in San Luis Obispo County	Feb-02	Completed
CARE Day in Santa Maria	PG&E partnered with the Santa Maria Big Kmart to host the enrollment event. The enrollment event featured 2 refrigerator giveaways, a public affairs program, live music and refreshments from a local Mexican bakery.	Feb-02	Completed
CARE Day in Santa Maria	Developed and distributed CARE Day event fliers and posters for posting and distribution at Big Kmart.	Feb-02	Completed
CARE Day in Santa Maria	Generated nearly 350 CARE applications	Feb-02	Completed

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CARE Day in Santa Maria	As part of the Kmart partnership in Santa Maria, bluelight specials were announced prior to and the day of the enrollment event	Feb-02	Completed
CARE Days in San Luis Obispo County and Santa Maria	Printed and distributed 50,000 door hangers promoting the events in San Luis Obispo County and Santa Maria. The door hangers provided information about the enrollment events, as well as listing the income guidelines and the toll-free number	Feb-02	Completed
CARE Customer Focus Groups	To better determine the barriers to enrollment to CARE, PG&E conducted four focus groups with CARE eligible but unenrolled customers. These were conducted in language in the Bay Area to English, Spanish, Cantonese and Vietnamese speaking customers.	Jan.2002 -Feb.2002	Completed
Chinese New Year Event in Oakland	In celebration of the Chinese New Year, PG&E conducted a CARE enrollment drive at the Oakland Chinese New Year Festival. More than 400 customers applied for CARE during the event.	Feb-02	Completed
CARE Toll-Free Line Receives 54,000 Calls	PG&E's toll-free line has proven to be an effective educational tool for customers. Since August 15, the line has logged 54,000 calls in five languages (Cantonese, English, Mandarin, Spanish and Vietnamese). More than 7,000 callers have requested CARE applications through the toll-free line and 2,500 have been referred to CARE community contractors via the line.	Feb-02	On-Going
Goodwill Industres Partnership	Goodwill Industries joined the CARE campaign as a community partner. Through its partnership, Goodwill produced a public service announcement that aired on KSBY-TV in San Luis Obispo to promote the CARE enrollment events on the Central Coast. Goodwill also produced radio PSAs that aired on various English and Spanish-language radio stations in the area.	January 2002 - February 2002	Completed
CARE Day in Bakersfield	PG&E sponsored the 4th Annual African American/Minority Community Health Fair/Business Expo in Bakersfield. The fair had approximately 1,000 attendees. Ebony Counseling Center, a PG&E contractor, organized the event and signed up eligible CARE customers.	Feb-02	Completed
CARE Day in Bakersfield	As an incentive to sign up for CARE, 400 church fans and 600 CARE squeeze lights were distributed.	Feb-02	Completed
CARE Day in Bakersfield	More than 18,000 fliers were distributed to Bakersfield households and 1,500 fliers were passed out at malls frequented by African Americans	Feb-02	Completed
CARE Day in Bakersfield	More than 30 PG&E customers brought their bills to the event, showing how effective the flier distributions were. Nearly 70 potential applicants will be contacted after the event for post-enrollment.	Feb-02	Completed
City College Teacher Announcements	City College teachers made announcements before the enrollment event in their classes, explaining the CARE program and informing their students of the opportunity to sign-up.	Feb-02	Completed
City College Event	Enrollment event located at City College of San Francisco. More than 200 applications were submitted in a two-day period and the event was extended for a third day due to the high demand.	Feb-02	Completed
Promotional Materials	Produced magnetic calendars, bags, and stickers for use during the Asian enrollment event in February.	Feb-02	Completed
Oakland Chinese New Year Event	PG&E and Asian, Inc., a CARE community partner hosted a booth at the two-day Oakland Chinese New Year Festival. An energy-efficient refrigerator was raffled off and more than 400 CARE applications were submitted.	Feb-02	Completed
San Jose Vietnamese Tet Festival Event	PG&E partnered with Asian, Inc. to host a booth at the San Jose Vietnamese Tet Festival. The three-day enrollment event produced more than 150 CARE applications. Squeeze lights and magnets were given to new CARE enrollees and three energy efficient refrigerators were raffled off.	Feb-02	Completed
San Francisco Chinese New Year Event	PG&E and Asian, Inc., a CARE community partner hosted a booth at the two-day San Francisco Chinese New Year Festival. An advertisement was placed in Asia Week inviting the Chinese community to the CARE booth at the festival and promotional items such as magnets and squeeze lights were given away to CARE enrollees. Three energy-efficient refrigerators were raffled off and over 300 CARE applications were submitted.	Feb-02	Completed
Fresno Unified School District, Migrant Education Department			
Hoopa Valley All-Indian Basketball Tournament	PG&E sponsored the Hoopa Valley All-Indian Basketball Tournament in March. Over 50 families enrolled at the event, which had a crowd of approximately 250 attendees throughout the three-day tournament. A refrigerator was raffled and all CARE applicants received CARE squeeze lights.	Mar-02	Completed

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Spring Families Festival	PG&E hosted a booth at the Spring Families Festival in Fresno. The festival targets the Hmong community and PG&E partnered with community partners Fresno Center for New Americans and Lao Family Community of Fresno. Squeeze lights and magnets were given away to new CARE enrollees and an energy efficient refrigerator was raffled off. More than 200 CARE applications were submitted over the two-day event.	Mar-02
CARE Toll-Free Line Receives 65,000 Calls	PG&E's toll-free line has proven to be an effective educational tool for customers. Since August 15, the line has logged 65,000 calls in five languages (Cantonese, English, Mandarin, Spanish and Vietnamese). More than 8,500 callers have requested CARE applications through the toll-free line and more than 3,000 have been referred to CARE community contractors via the line.	Mar-02
California Indian/Native American Outreach	PG&E is in the process of creating an application insert specifically targeting the California Indian/Native American population. Posters promoting the CARE program are also in production, using artwork from well-known Native American artist Paul Stone.	Mar-02
Six New CARE COCs Join Outreach Efforts	Six new CARE COCs have applied for and joined PG&E's CARE outreach team.	Mar-02
CARE Day in Sacramento	PG&E hosted an enrollment event in Sacramento, targeting the large Asian population there. Over 150 CARE applications were submitted with the help of a CARE COC. A short program featured the Hmong Dance Troupe, folk dances and songs. As incentives to signing up for CARE, new enrollees were given goody bags filled with in-language magnets, balloons, CARE information and squeeze lights, as well as a turn to spin the Wheel of Fortune for a chance at another small prize. An energy-efficient refrigerator was raffled off.	Mar-02
Community Focus Newsletter	The inaugural issue of <i>Community Focus</i> , a newsletter dedicated to critical issues and concerns of PG&E's customers, was dedicated primarily to the CARE program and the recent enrollment surges in the program. The newsletter was sent to California elected officials, CARE contractors, and CARE community partners, as well as distributed internally to PG&E's employees.	Mar-02
Outbound Call Center	Phase III of the Outbound Call Center concluded. The call center's purpose was to boost PG&E's recertification efforts. Over 18,000 households were reached in Phase III of the call center, with more than 35,000 households reached in all three phases.	Mar-02
San Jose's Feria de la Mujer y la Familia	PG&E hosted a booth at the San Jose Feria de la Mujer y la Familia. This event, located at the Mexican Heritage Plaza, was targeting primarily Hispanic women and their families. Five CARE COC's volunteered to enroll eligible CARE customers and over 150 applications were submitted. PG&E squeeze lights were given away as incentives and an energy-efficient refrigerator was raffled off.	Apr-02
Fresno's El Día de la Mujer	PG&E hosted a booth at the Fresno El Día de la Mujer. This event was targeting primarily Hispanic women. Two CARE COC's volunteered to enroll eligible CARE customers and over 80 applications were submitted. PG&E squeeze lights were given away as incentives and an energy-efficient refrigerator was raffled off.	Apr-02
CARE Toll-Free Line Receives 75,000 Calls	PG&E's toll-free line has proven to be an effective educational tool for customers. Since August 15, the line has logged 75,000 calls in five languages (Cantonese, English, Mandarin, Spanish and Vietnamese). Nearly 12,000 callers have requested CARE applications through the toll-free line and more than 4,000 have been referred to CARE community contractors via the line.	Apr-02
CARE COC Training	Seven CARE COCs were trained via conference call.	Apr-02
Native American Outreach Materials	To reach the large Native American population within the service territory, PG&E created Native American specific posters and applications. These materials were distributed to 200 tribal councils, nonprofits and other organizations. Additionally, Native American Heritage Commission Executive Director Larry Myers provided a letter of endorsement that was sent with the packet.	April-May
Stockton Enrollment Event to reach APA Communities	event in Stockton marks a new milestone in PG&E's CARE outreach initiative by successfully tapping hard-to-reach Southeast Asian ethnicities such as Lao, Hmong, Cambodian, and Vietnamese.	May-02
Artist Distributes CARE Materials at Stanford Powwow	Artist Paul Stone, whose work appears on PG&E's new Native American outreach materials, distributed CARE applications at the Stanford Powwow, the largest gathering of Indians in Northern California.	May-02
El Concilios Cinco de Mayo Event	CARE and EP info was distributed. PG&E worked side by side with El Concilio to sign up CARE customer and EP simultaneously. 31 customers were signed up on EP that afternoon and approx 50 on CARE. Mainly spanish speaking audience.	May-02

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June Bill Insert	For the second time in 2002, PG&E distributed bilingual CARE applications in 4.8 million customers bills. PG&E also printed CARE messages on the front and back of the bill envelope.	Jun-02	Completed
Outreach to Filipino Community	PG&E sponsors Pistahan Festival in San Francisco to promote CARE within the Filipino community.	Aug-02	Completed
Lion's Dance Festival	PG&E sponsored the Self-Help for the Elderly's Lion's Dance Festival, a major event in San Francisco's Chinese community.	Aug-02	Completed
COC Recognition Event	In celebration of the one-year anniversary of the CARE outreach and education campaign and to thank our COCs for their diligent work, PG&E hosted a recognition luncheon in San Francisco and distributed awards to those COCs who had gone above and beyond	Aug-02	Completed
Workplace Initiative Begins	In an effort to increase its outreach efforts among the working poor, PG&E launched a program to contact employers and offer them CARE brochures to pass on to their employees, CARE posters to display in break/storage rooms, mail newsletter articles for employee newsletters and in-person presentations for employees.	Aug-02	On-Going
Chinatown Night Market Outreach	PG&E partnered with Asian, Inc. to host a booth at the Chinatown Night Market at Portsmouth Square in San Francisco. Many applications were submitted and balloons and squeeze lights were given away as incentives.	Aug-02	Completed
CARE Community Leaders Breakfast	To kick off the San Francisco Enrollment Drive and inform local community leaders about the CARE program, five COCs and PG&E hosted a breakfast briefing on the CARE program and distributed information for community leaders to pass on to their customer base	Aug-02	Completed
San Francisco Enrollment Drive	Ten community partners and four radio stations joined PG&E for a three-site San Francisco Enrollment drive over a two-day period. More than 2,000 CARE applications were generated from the event.	Sep-02	Completed
Gospel by the Bay Outreach	CARE COCs were on hand at the Gospel by the Bay in Vallejo to enroll eligible customers in CARE. Approximately 100 applications were submitted and balloons, squeeze lights and church fans were passed out as incentives to enrolling.	Sep-02	Completed
Vietnamese Moonfestivals in Oakland and San Jose	CARE booths were set up at both the San Jose and Oakland Vietnamese Moonfestivals to enroll CARE eligible customers and educate customers about the program. Two COCs joined the enrollment efforts. In-language collateral was available and many customers signed up for the discount program.	Sep-02	Completed
East Palo Alto Enrollment Event	PG&E hosted an enrollment event in East Palo Alto targeting the large African American population. Nearly 75 CARE applications were submitted with the help of CARE COCs. The Clowns of Color entertained the children and KDYA, a gospel station, had a remote at the event.	Oct-02	Completed
Chinatown Night Market Outreach	Two COCs joined with PG&E to host a booth at the Chinatown Night Market. Over 100 applications were submitted and CARE information was available.	Oct-02	Completed
Día de los Muertos Outreach	PG&E partnered with community-based organizations to conduct a major enrollment effort at Día de los Muertos in Oakland. Nearly 300 customers signed up for CARE.	Oct-02	Completed
Presentations			
Italian American Community Cntr. SF	Financial Assistance Programs, EP, CARE, Outages/Emergency Response and Winter Tips to 25 Seniors	1/9/2002	Completed
SMUD Coalition	Financial Assistance Programs, EP, CARE to Care Providers for Sr. and Low-Income Customers	1/9/2002	Completed
California Foundation of Independent Living Centers Statewide Meeting (Disabled Community) Sacramento	Presentation on Financial Assistance Programs, EP, CARE. Shared outreach efforts we are doing to the disabled community. Obtained suggestions and recommendations from attendees on the programs, improving outreach to the disabled.	1/28/2002	Completed
Presentation to Widow/Widowers Club So. San Francisco	Financial Assistance Programs, EP, CARE to Care Providers for Sr. and Low-Income Customers	2/1/2002	Completed
TEAM Coalition	Financial Assistance Programs, EP, CARE to 25 Care Providers for Sr. and Low-Income Customers	2/7/2002	Completed
Aster Park Sunnyvale	Financial Assistance Programs, EP, CARE, Outages/Emergency Response and Winter Tips to 50 Seniors and Low-Income Customers (Vietnamese) HUD Housing	2/7/2002	Completed
Ginzton Terrace - Mtn. Vw.	Financial Assistance Programs, EP, CARE, Outages/Emergency Response and Winter Tips to 35 Seniors (Russian) HUD Housing	2/11/2002	Completed
Homestead Park - Sunnyvale	Financial Assistance Programs, EP, CARE, Outages/Emergency Response and Winter Tips to 50 Seniors and Low-Income Customers HUD Housing	2/11/2002	Completed

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Sr. Coalition West CCC	Financial Assistance Programs, EP, CARE to 15 Care Providers for Sr. and Low-Income Customers	2/13/2002	Completed
Sing Tao Radio	CARE, EP information to Bay Area Chinese Speaking audience.	2/21/2002	Completed
Chinese New Year Street Fair	CARE, EP information to Bay Area Chinese Speaking audience.	2/23 & 2/24/2002	Completed
KMTP TV Ch32	CARE, EP information to Bay Area Chinese Speaking audience.	2/25/2002	Completed
Fresno USD, Migrate Ed Dept.	Financial Assistance Programs, EP, CARE to 75 low-income parent coalition of Migrant Families: Hmong and Spanish speaking	2/28/2002	Completed
3 visits with CARE Outreach Contractors in Fresno - Lao Family Community, Council for Spanish Speaking, Fresno Center for New Americans	Review of CARE Application, PG&E bill, Financial Assistance Programs, EP, Medical Baseline and community coalitions and events with CARE Capitation Contractors and Providers for Sr. and Low-Income Customers.	3/1/02	Completed
4 Visits with CARE Outreach Contractors - El Concilio, West Coast Valet Services, No. Peninsula Neighborhood Svcs, and Center for Independence of Disabled	Review of CARE Application, PG&E Bill, Financial Assistance Programs, EP, Medical Baseline, Winter Tips, and Emergency Response with CARE Capitation Contractor and Providers for Sr. and Low-Income Customers.	3/4/02	Completed
Visit with CARE Outreach Contractor - Korean Center	Review of CARE Application, PG&E Bill, Financial Assistance Programs, EP, Medical Baseline, Winter Tips, and Emergency Response with CARE Capitation Contractor and Providers for Sr. and Low-Income Customers.	3/7/02	Completed
Veterans Memorial Building, Santa Rosa - Senior Celebration Fair	Financial Assistance Programs, EP, CARE, Outages/Emergency Response and Winter Tips to 500 senior/low-income customers and service providers.	3/11/2002	Completed
SMUD Coalition	Financial Assistance Programs, EP, CARE to 35 Care providers for Sr. and Low-Income customers	3/13/2002	Completed
Sr. Coalition West CCC	Financial Assistance Programs, EP, CARE to 12 Care providers for Sr. and Low-Income Customers	3/13/2002	Completed
Franklin School Parent Meeting - Health Start	Financial Assistance Programs, EP, CARE to 40 low-income Spanish-speaking families.	3/15/2002	Completed
Visit with CARE Outreach Contractor - The Greenlining Institute	Review of CARE Application, PG&E Bill, Financial Assistance Programs, EP, Medical Baseline, Winter Tips, and Emergency Response with CARE Capitation Contractor and Providers for Sr. and Low-Income Customers.	3/22/02	Completed
Self Help for the Elderly (737 Folsom Senior Center)	CARE & EP to 35 Chinese & English speaking seniors.	3/22/02	Completed
Visit with CARE Outreach Contractor - American Viet League	Financial Assistance Programs, CARE Application, Baseline, Winter Tips and PG&E Bill and EP Program with CARE Capitation Contractor and Providers for Sr. and Low-Income Customers.	3/26/02	Completed
Visit w/CARE Outreach Contractor - Asian Inc.	Financial Assistance Programs, CARE Application, Baseline, Winter Tips and PG&E Bill and EP Program with CARE Capitation Contractor and Providers for Sr. and Low-Income Customers.	3/27/02	Completed
Self Help for the Elderly (737 Folsom Senior Center)	CARE & EP to Chinese, Russian, & English speaking seniors.	3/28/02	Completed
MUD Third Party Initiative Program - Fresno event	TPI media event providing program information and refrigerators to 206 low income residents of a master-metered apartment complex in Fresno.	3/28/2002	Completed
Visit w/CARE outreach contractor - Spanish Speaking Unity Council	Financial Assistance Programs, CARE Application, Baseline, Winter Tips and PG&E Bill and EP Program with CARE Capitation Contractor and Providers for Sr. and Low-Income Customers.	4/2/02	Completed
Visit Care Outreach Contractor - Family Bridges	Financial Assistance Programs, Review CARE Application, Baseline, Winter Tips and EP Program with CARE Capitation Contractor and Providers for Sr. and Low-Income Customers	4/3/02	Completed
Senior Coalition West Contra Costa	Financial Assistance Programs, EP, CARE with Care Providers for Sr. and Low-Income Customers and Energy Partners Program.	4/4/02	Completed
The Eden Advocacy Matrix (TEAM)	PG&E presented the financial assistance programs, CARE and EP to Low Income Non profits in the Ashland area	4/4/2002	Completed
Visit with CARE Outreach Contractor - Self Help for the Elderly	Review of CARE Application, PG&E Bill, Financial Assistance Programs, EP, Medical Baseline, Winter Tips, and Emergency Response with CARE Capitation Contractor and Providers for Sr. and Low-Income Customers.	4/9/02	Completed
Senior Coalition West Contra Costa	Financial Assistance Programs, EP, CARE with 21 Care Providers for Sr. and Low-Income Customers and Energy Partners Program.	4/10/02	Completed
SMUD Coalition	Financial Assistance Programs, EP, CARE with 35 Care Providers for Sr. and Low-Income Customers.	4/10/02	Completed
ACORN Earth Day Event	EP, CARE, Financial Assistance Programs with 400 Sr. and Low-Income Customers.	4/20/02	Completed

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Visit with CARE Outreach Contractor - San Francisco Community Power Cooperative	Review of CARE Application, PG&E Bill, Financial Assistance Programs, EP, Medical Baseline, Winter Tips, and Emergency Response with CARE Capitation Contractor and Providers for Sr. and Low-Income Customers.	4/24/02	Completed
EBMUD Earth Day Event	CEE Programs, EP, CARE, Financial Assistance Programs, Emergency Response with 50 EBMUD employees.	4/24/02	Completed
TEAM Coalition	EP, CARE, Financial Assistance Programs with 20 Care Providers for Sr. and Low-Income Customers.	5/2/02	Completed
The Eden Advocacy Matrix (TEAM)	PG&E presented the financial assistance programs, CARE and EP to Low Income Non profits in the Ashland area	5/2/2002	Completed
El Concilio's Cinco de Mayo Event	Signed customers up for CARE/EP and discussed our financial assistance programs with 500 Hispanic Low Income, seniors and disabled customers.	5/5/02	Completed
Visit with CARE Outreach Contractors (4-Stockton) - Cambodian Community of Stkn, Lao Khmu Assoc, Lao Family Community, Bibleview Baptist Church	Review of CARE Application, PG&E Bill, Financial Assistance Programs, EP, Medical Baseline, coalitions, community events and speaker bureau number with CARE Capitation Contractor and Care Providers for Sr. and Low-Income Customers.	5/24/02	Completed
Sacramento Community Housing Coalition	Financial Assistance Programs, EP, CARE for 35 Care Providers for Sr. and Low-Income Customers	5/8/02	Completed
Visit with CARE Outreach Contractors (4-Stockton) - Cambodian Community of Stkn, Lao Khmu Assoc, Lao Family Community, Bibleview Baptist Church	Review of CARE Application, PG&E Bill, Financial Assistance Programs, EP, Medical Baseline, coalitions, community events and speaker bureau number for 5 CARE Capitation Contractor and Care Providers for Sr. and Low-Income Customers	5/16/02	Completed
Sr. Awareness Day, Stockton	Signed customers up for CARE/EP and discussed our financial assistance programs for 500 Senior and disabled customers	5/23/02	Completed
Senior Health Fair, Richmond Auditorium	Signed customers up for CARE/EP and discussed our financial assistance programs for 150 Senior customers	5/21/02	Completed
Meeting w/COC	EP, CARE, Financial Assistance Programs for 3 CARE Capitation Contractors and Care Providers for Sr. and Low-Income Customers	5/10/02	Completed
Meeting with West CC Senior Coalition	EP, CARE, Financial Assistance Programs for 18 CARE Capitation Contractors and Care Providers for Sr. and Low-Income Customers	5/15/02	Completed
Senior Information Day West CC	EP, CARE, Financial Assistance Programs for 150 CARE Capitation Contractors and Care Providers for Sr. and Low-Income Customers	5/21/02	Completed
Meeting with Korean Community	EP, CARE, Financial Assistance Programs for 2 CARE Capitation Contractors and Care Providers for Sr. and Low-Income Customers	5/23/02	Completed
Silicon Valley Area Agency on Aging, 35 Members of their Advisory Council	EP, CARE, Financial Assistance Programs for 35 Care Providers for Sr. and Low-Income Customers	6/3/02	Completed
Milpitas Kaiser MS Support Group Mtg	EP, CARE, Financial Assistance Programs for 20 Disabled Customers	6/4/02	Completed
Visit with CARE Outreach Contractor - California Human Development Corporation	Review of CARE Application, PG&E Bill, Financial Assistance Programs, EP, Medical Baseline, Winter Tips, and Emergency Response for 2 CARE Capitation Contractors and Providers for Sr. and Low-Income Customers	6/5/02	Completed
Sacramento Community Housing Coalition	Financial Assistance Programs, EP, CARE for 35 Care Providers for Sr. and Low-Income Customers	6/12/02	Completed
Met w/Care Outreach Contractor (COC) CA Congress of Seniors Education & Research Fund	Review of CARE Application, PG&E Bill, Financial Assistance Programs, EP, Medical Baseline, coalitions, community events and speaker bureau number for CARE Capitation Contractor and Care Provider for Sr. and Low-Income Customers	6/12/02	Completed
TEAM Coalition	Financial Assistance Programs, EP, CARE for 25 Care Providers for Sr. and Low-Income Customers	6/6/02	Completed
State Capitol Energy Fair - Sacramento	Financial Assistance Programs, EP, CARE for 200 Care Providers for Sr. and Low-Income Customers	6/13/02	Completed
Met w/Care Outreach Contractor (COC) Asian Resources - Presentation to staff	Review of CARE Application, PG&E Bill, Financial Assistance Programs, EP, Medical Baseline, coalitions, community events and speaker bureau number for 5 CARE Capitation Contractors and Care Providers for Sr. and Low-Income Customers	6/26/02	Completed
Met w/J Joanna Selby - CA Commission on Aging Commissioner & Alameda County Commission on Aging Chair	Review of CARE Application, PG&E Bill, Financial Assistance Programs, EP, Medical Baseline, coalitions, community events and speaker bureau number for 2 CARE Capitation Contractors and Care Providers for Sr. and Low-Income Customers	6/26/02	Completed

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Multi-Family Consortium (PEC - San Francisco)	Provided info on CARE, EP, Financial Assistance Programs and Services for 40 Multi-family markets in California, including developers, legislators, and utilities	7/17/02	Completed
New Beginnings Coalition for Aging and Adult Services	Financial Assistance Programs, EP, CARE for 7 Providers for Aging and Adult Services	7/31/02	Completed
Senior Information and Referral Forum - Community Information Program	Financial Assistance Programs, EP, CARE for 2 Providers of Services for Seniors and Disabled	7/31/02	Completed
CA Association of NonProfits (CAN) Energy Equity for Nonprofits - Fresno	EP, CARE, REACH, Express Efficiency, Mutli-Family Rebates	7/23/02	Completed
Sacramento Community Housing Coalition	Financial Assistance Programs, EP, CARE	7/10/02	Completed
Community Action Board of Santa Cruz	Financial Assistance Programs, EP, Medical Baseline, coalitions, community events and speaker bureau number	7/19/02	Completed
Korean American Community Services, Inc.	Review of CARE Application, PG&E Bill, Financial Assistance Programs, EP, Medical Baseline, coalitions, community events and speaker bureau number	7/19/02	Completed
Center for Training and Careers	Review of CARE Application, PG&E Bill, Financial Assistance Programs, EP, Medical Baseline, coalitions, community events and speaker bureau number	7/19/02	Completed
Met with Retro Tech	Review of CARE Application, PG&E Bill, Financial Assistance Programs, EP, Medical Baseline, coalitions, community events and speaker bureau number	8/1/2002	Completed
Met with Elder Abuse staff	Review of CARE Application, PG&E Bill, Financial Assistance Programs, EP, Medical Baseline, coalitions, community events and speaker bureau number	8/1/2002	Completed
Presenation to Seniors - San Pablo	Review of CARE, EP, Medical Baseline, Financial Assistance Program, community events.	8/16/2002	Completed
Met with OCCUR staff member	Review of CARE, EP, Medical Baseline, Financial Assistance Program, community events.	8/26/2002	Completed
Presentation to Health Care Providers	Review of CARE Application, PG&E Bill, Financial Assistance Programs, EP, Medical Baseline, coalitions, community events and speaker bureau number	8/27/2002	Completed
Event participation - Commission on A	Review of Financial Assistance Programs, EP, CARE, Medical Baseline, community events.	10/10/2002	Completed
CA Association of NonProfits (CAN) Energy Equity for Nonprofits - San Jose	EP, CARE, REACH, Express Efficiency, Mutli-Family Rebates	8/13/2002	Completed
Community Food & Security Meeting- Auburn	EP, CARE, Financial Assistance Programs, Rebates, Energy Efficiency	8/28/2002	Completed
Foothill Volunteer Center - Auburn	EP, CARE, Financial Assistance Programs, Rebates, Energy Efficiency	8/28/2002	Completed
Sacramento Community Housing Coalition	Update on EP and CARE programs	9/11/2002	Completed
Slavic Community Center of Sacramento	EP, CARE, Financial Assistance Programs, Rebates, Energy Efficiency	9/11/2002	Completed
Yuba Sutter Legal Center	EP, CARE, Financial Assistance Programs, Rebates, Energy Efficiency	9/17/2002	Completed
Suscol Inter Tribal Council	EP, CARE, Financial Assistance Programs, Rebates, Energy Efficiency	9/19/2002	Completed
Sacramento Community Housing Coalition	Update on EP and CARE programs	10/9/2002	Completed
CA Association of NonProfits (CAN) Energy Equity for Nonprofits - Watsonville	EP, CARE, REACH, Express Efficiency, Mutli-Family Rebates	10/23/2002	Completed
CA Association of NonProfits (CAN) Energy Equity for Nonprofits - San Luis Obispo	EP, CARE, REACH, Express Efficiency, Mutli-Family Rebates	10/24/2002	Completed
SMUD	Sent SMUD 300 English/Spanish CARE Application Brochures and 50 Hmong and Russian Financial Assistance Programs Flyers. SMUD provides this PG&E's programs to their customers when promoting their programs.	1/28/2003	Completed

Abbreviations

CARE - California Alternate Rates for Energy
LIEE - Low Income Energy Efficiency Program
EP - Energy partners (PG&E's LIEE Program)
SIRS - Sons in Retirement
RCP - Residential Contractor Program
CFL - Compact Fluorescent Light
HEAP - Home Energy Assistance Program (federal program)
REACH - PG&E bill assistance program administered by the Salvation Army

ATTACHMENT D

CARE Media and Advertising Initiatives

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CARE Advertising Initiative (A)	Summary (B)	Timeline (C)	Status (D)
Media Outreach			
Kmart Agrees To Corporate Partnership	The Kmart Corporation agreed to support PG&E's CARE outreach campaign by hosting enrollment events at its Super Kmart store in San Jose and Salinas. In addition, Kmart agreed to distribute CARE educational materials to its customers at these stores.	Sep-01	On-Going
KIDE-FM Media Partnership	KIDE-FM in Eureka, the first Native American owned radio station in the United States, agrees to join the CARE campaign as a media partner.	Nov-01	On-Going
Holiday Media Outreach	As a part of its outreach efforts, the Alameda County Community Food Bank distributes CARE materials to Bay Area families. To promote this important effort and educate customers, the Food Bank and PG&E are distributing news releases to media outlets.	Dec-01	On-Going
Radio Bilingue Partnership	In an effort to reach eligible customers in the Central Valley, particularly agricultural workers, PG&E signs a media partnership with Radio Bilingue, the non-profit Spanish-radio network.	Dec-01	Jan.-Mar. 2002
KE Buena	To reach the Spanish-language audience in Sacramento, Claudia Mendoza was interviewed on KE Buena.	Jan-02	Completed
Radio Bilingue	Claudia Mendoza of PG&E was interviewed on the Radio Bilingue network, where she discussed the benefits of the CARE program.	Jan-02	Completed
Napa Valley, Solano County Interviews	Claudia Mendoza of PG&E was interviewed on La Vaqueria (KSQR). The interview will be broadcast in the Napa Valley and Solano County.	Jan-02	Completed
CARE Enrollment Events Media Coverage	PG&E generated extensive media coverage for its enrollment events on the Central Coast in February, including television coverage on KTAS-TV, the local Telemundo affiliate, KSBY-TV, the local NBC affiliate. Newspaper coverage included an article in SLO's	January 2002 - February 2002	Completed
March CARE Application Bill Insert Promotions	In order to promote the March CARE application bill insert to Spanish-dominant customers, PG&E radio promotions ran on the following stations: KCHJ-AM, KIWI-FM, KMYX-FM, KPSL-FM, KWAC-FM, KGST-AM, KLBN-FM, KMMM-FM, KOOR-FM, KOQO-FM, KRNC-FM, KWRU-FM, KLO	Mar-02	Completed
Asian Pacific American Outreach Media Promotions	In order to promote CARE Day in Sacramento, PG&E ran promotion spots on Asian-language radio, such as KJAY-FM and KLIB-FM.	Mar-02	Completed
San Jose's Feria de la Mujer Radio Promotions	In conjunction with PG&E's sponsorship of San Jose's Feria de la Mujer y la Familia, radio promotions aired on KSOL-FM.	Apr-02	Completed
Fresno's El Dia de la Mujer Radio Promotions	In conjunction with PG&E's sponsorship of Fresno's El Dia de la Mujer, radio promotions aired on KOQO-FM, KOOR-AM and KRNC-FM.	Apr-02	Completed
Stockton Radio Promotions	To support a CARE enrollment event in Stockton, PG&E aired CARE educational and promotional messages on Hmong, Lao and Vietnamese radio stations in the area.	May 10-13	Completed
Stockton Media Interviews	Educational interviews on the CARE program ran on Radio TNT/KLIB, a Vietnamese radio station; KJAY, a local Hmong radio station; and KJAY, the local Lao radio station. All three interviews promoted PG&E's enrollment event in Stockton on May 12.	May 8-9	Completed
Yolo Asian Radio Promotions	To reach the large Lao, Hmong and Mien populations in the Sacramento area, PG&E is putting CARE educational messages on KJAY 1430 AM and KLIB 1110 AM.	May 16-23	On-Going
Sinocast Radio, SF	Expanded CARE guidelines	June	Completed
International Daily News, SF	Expanded CARE guidelines	June	Completed
El MexiCalo Newspaper, Bakersfield	20/20 Rebate Program, CARE	June	Completed
Chinese Times, SF	Expanded CARE guidelines	June	Completed
El Sol Newspaper, Central Valley	20/20 Approved by CPUC for PG&E	June	Completed
Nuevo Mundo, San Jose	Savings of 20% with CARE Program	June	Completed
La Nueva Prensa, Concord	CARE for Low Income PG&E Customers	June	Completed
World Journal, Millbrae	Expanded CARE guidelines	June	Completed
Philippine News, SF	CARE Eligibles Encouraged to Enroll During Summer Months, Expanded Income Guidelines	June	Completed
Radio Seoul, SF	CARE Eligibles Encouraged to Enroll During Summer Months, Expanded Income Guidelines	June	Completed
Chinese Times, SF	CARE Eligibles Encouraged to Enroll During Summer Months, Expanded Income Guidelines	June	Completed
Sing Tao Daily, SF	CARE Eligibles Encouraged to Enroll During Summer Months, Expanded Income Guidelines	June	Completed
En Contacto, Telemundo-33, Modesto	Conservation Tips, Appliances Rebates, 20/20, CARE, Help Line in Spanish	June	Completed
Radio Lazer, Santa Maria	Expanded CARE guidelines, Summer Tips, and Rebates	June	Completed

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Radio KWAC	Expanded CARE guidelines, Summer Tips, and Rebates	June	Completed
Radio KCHJ	Expanded CARE guidelines, Summer Tips, and Rebates	June	Completed
Radio KIWI	Expanded CARE guidelines, Summer Tips, and Rebates	June	Completed
Univision, KFTV-21, Fresno	Expanded CARE guidelines, Summer Tips, and Rebates	June	Completed
Univision, KABC-39, Bakersfield	Expanded CARE guidelines, Summer Tips, and Rebates	June	Completed
El Popular Newspaper, Bakersfield	20% Savings with PG&E's CARE Program	June	Completed
El MexiCalo Newspaper, Bakersfield	Families Eligible for Lower Energy Bills	June	Completed
Telemundo, KSTS-48, San Jose	July 1 CARE Announcement	July	Completed
Radio Bilingue Network	CARE, Summer Tips, Appliance Rebates	July	Completed
Radio Bilingue Network	CARE, Summer Tips, Appliance Rebates	July	Completed
Radio Bilingue Network	CARE, Summer Tips, Appliance Rebates	July	Completed
Radio Bilingue Network	CARE, Summer Tips, Appliance Rebates	July	Completed
Radio Bilingue Network	CARE, Summer Tips, Appliance Rebates	July	Completed
Radio Bilingue Network	Expanded CARE guidelines, Summer Tips, and Rebates	July	Completed
Univision, KDTV-14, San Francisco	July 1 CARE Announcement, 6pm news	July	Completed
Univision, KDTV-14, San Francisco	July 1 CARE Announcement, 11pm news	July	Completed
Radio Campesina, KBDS-92.5, Bakersfield	CARE, Summer Tips, Appliances Rebate, 20/20	July	Completed
KMYX Radio, Kern County	CARE, Summer Tips, Appliances Rebate, 20/20	July	Completed
KVFW, Tulare County	CARE, Summer Tips, Appliances Rebate, 20/20	July	Completed
KBHB, Fresno County	CARE, Summer Tips, Appliances Rebate, 20/20	July	Completed
KSCA Radio, Salinas	CARE, Summer Tips, Appliances Rebate, 20/20	July	Completed
Univision, KSMS-67, Salinas/Monterey	20/20 Program	July	Completed
El Bohemio News, San Francisco	Summer Relief for the Customers of Pacific Gas and Electric Company, CARE	July	Completed
Radio Unica, 1010-AM, KIQI, SF	Summer Tips and Conservation, CARE	July	Completed
Viet Mercury, San Jose	PG&E's CARE Program Can Save Qualified Households 20% on Monthly Bill	July	Completed
Radio Unica, 1010-AM, KIQI, SF	Conservation Tips, CARE	July	Completed
Telemundo, KSTS-48, San Jose	Conservation Tips, CARE	July	Completed
Radio Unica, 1010-AM, KIQI, SF	Conservation Tips, CARE	July	Completed
Telemundo, KSTS-48, San Jose	Conservation Tips, Heat Wave Safety, CARE	July	Completed
Channel 26, KTSF-26, Mandarin	Conservation Tips, Heat Wave Safety, CARE	July	Completed
Channel 26, KTSF-26, Cantonese	Conservation Tips, Heat Wave Safety, CARE	July	Completed
Telemundo, San Jose, KSTS-48	CARE Press Conference with Catholic Charities	July	Completed
Sing Tao Chinese Radio	Energy Conservation and Energy Efficiency, CARE	July	Completed
El MexiCalo, B/field	Consejos de PG&E Para Ahorrar Energis y Dinero, CARE	July	Completed
El Sol, Central Valley	Ahorros e incentivos de PG&E, CARE	July	Completed
Sing Tao Daily, San Francisco	PG&E Officer Addresses Chinese Media at Luncheon, Addresses Upcoming CARE Events in Chinatown	July	Completed
International Daily News, San Francisco	PG&E Officers Kathy Fong and Laura Chiu Address Chinese Media at Luncheon	July	Completed
China Press, San Francisco	PG&E Officers Kathy Fong and Laura Chiu Address Chinese Media at Luncheon	July	Completed
Univision, Sacramento, KUVS-19	Rebate programs and 20/20	August	Completed
The Sun Reporter, San Francisco	Pacific Gas and Electric Company Expands African American Outreach Campaigns in Northern California	August	Completed
Radio Bilingue	Electric conservation	August	Completed
India West, Emeryville	PG&E Offers Summer Savings For Indian Businesses	August	Completed
Oakland Metro Reporter, San Francisco	Pacific Gas and Electric Company Expands African American Outreach Campaigns in Northern California	August	Completed
Berkeley Metro Reporter, San Francisco	Pacific Gas and Electric Company Expands African American Outreach Campaigns in Northern California	August	Completed
Vallejo Metro Reporter, San Francisco	Pacific Gas and Electric Company Expands African American Outreach Campaigns in Northern California	August	Completed
Peninsula & San Jose Metro Reporter, San Francisco	Pacific Gas and Electric Company Expands African American Outreach Campaigns in Northern California	August	Completed
San Francisco Metro Reporter, San Francisco	Pacific Gas and Electric Company Expands African American Outreach Campaigns in Northern California	August	Completed
San Joaquin Metro Reporter, San Francisco	Pacific Gas and Electric Company Expands African American Outreach Campaigns in Northern California	August	Completed
Chinese Times, San Francisco	PG&E Celebrates 1st Year of Enrollment with CARE Program in Oakland	August	Completed
International Daily News, San Francisco	PG&E Celebrates 1st Year of Enrollment with CARE Program in Oakland	August	Completed
China Press, San Francisco	PG&E Celebrates 1st Year of Enrollment with CARE Program in Oakland	August	Completed
The Filipino Guardian, San Francisco	PG&E To Offer Discounted Rate Program At Pistahan Festival	August	Completed
KMPO-FM, Stockton/Modesto	Summer Conservation Tips, Payment Assistance Programs, Rebates	August	Completed
KTQX-FM Radio, B/field	Summer Conservation Tips, Payment Assistance Programs, Rebates	August	Completed
KSJV-FM Radio, Fresno	Summer Conservation Tips, Payment Assistance Programs, Rebates	August	Completed
KBBF-FM Radio, Sonoma	Summer Conservation Tips, Payment Assistance Programs, Rebates	August	Completed

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KLJB-FM Radio, Sacramento	Summer Conservation Tips, Payment Assistance Programs, Rebates	August	Completed
KHDC-FM Radio, Salinas	Summer Conservation Tips, Payment Assistance Programs, Rebates	August	Completed
Manila Mail, San Francisco	PG&E Joins Filipino Festival	August	Completed
Manila Bulletin USA, South San Francisco	Pacific Gas Salutes Filipino community in Pistahan Festival	August	Completed
Radio Bilingüe Partnership	To reach the Central Valley's Spanish-dominant PG&E customers. PG&E created and launched a series of mini-dramas on CARE on Radio Bilingüe. As a result of this partnership, Spanish-language calls to CARE's toll-free line increase in the Central Valley	Aug-October	Completed
San Francisco Enrollment Drive Promotions	PG&E used paid media to promote its 3-site enrollment drive in San Francisco County. The media included: Spanish-, Cantonese, Vietnamese, Mandarin, English-language radio stations; Cantonese and Spanish-language television; Chinese newspapers.	Sept 1-8	Completed
Manila Mail, Daly City	PG&E, SelfHelp for the Elderly & Other Local Groups Partnering to Reach More Than 35000 San Franciscans Missing Out On Energy Discount	September	Completed
Thoi Bao, San Jose	PG&E partner with Self-Help for the Elderly, Others on a Major CARE Enrolment Drive, September 6-8	September	Completed
International Daily News, San Francisco	PG&E partner with Self-Help for the Elderly, Others on a Major CARE Enrolment Drive, September 6-8	September	Completed
Sing Tao Daily, San Francisco	PG&E partner with Self-Help for the Elderly, Others on a Major CARE Enrolment Drive, September 6-8	September	Completed
Radio Unica, La Grande 1010-AM, KIQI, SF	CARE Week in San Francisco	September	Completed
World Journal, Millbrae	PG&E partner with Self-Help for the Elderly, Others on a Major CARE Enrolment Drive, September 6-8	September	Completed
Chinese Times, San Francisco	PG&E partner with Self-Help for the Elderly, Others on a Major CARE Enrolment Drive, September 6-8	September	Completed
China Press, San Francisco	PG&E partner with Self-Help for the Elderly, Others on a Major CARE Enrolment Drive, September 6-8	September	Completed
Sing Tao Daily, San Francisco	PG&E Officer, Anlin Ting Mason, Addresses Chinese Press at Luncheon	September	Completed
China Press, San Francisco	PG&E Officer, Anlin Ting Mason, Addresses Chinese Press at Luncheon	September	Completed
International Daily News, San Francisco	PG&E Officer, Anlin Ting Mason, Addresses Chinese Press at Luncheon	September	Completed
Chinese Times, San Francisco	PG&E Officer, Anlin Ting Mason, Addresses Chinese Press at Luncheon	September	Completed
World Journal, Millbrae	PG&E Officer, Anlin Ting Mason, Addresses Chinese Press at Luncheon	September	Completed
The Epoch Times, San Francisco	PG&E Introduces Chinese VP, Hosting CARE weekend in Chinatown	September	Completed
Berkeley Tri City Post, Oakland	Representatives of non-profit groups, Black radio and PG&E teamed up recently to get the word out about the CARE program	September	Completed
El Tecolote, San Francisco	PG&E Ofrece descuentos a familias de escasos recursos/PG&E Discounts Benefit Low-Income Families	September	Completed
East Palo Alto Enrollment Drive promotions	PG&E hosted an enrollment drive in East Palo Alto to reach out to the community's large African American population. To promote the event, PG&E placed paid media on Gospel radio station KDYA-AM.	October	Completed
Telemundo, KSTS-48, San Jose	Fall Lighting Sale	October	Completed
Radio KWAC, Bakersfield	CARE, Fall Lighting Sale, Payment Options, Conservation, Storm Safety, CorDaptix	October	Completed
Radio Campesina, Bakersfield	CARE, Fall Lighting Sale, Payment Options, Conservation, Storm Safety, CorDaptix	October	Completed
Univision, KFTV-21, Fresno- Arriba Valle C	CARE, Fall Lighting Sale, Payment Options, Conservation	October	Completed
Univision, KABE-39, Bakersfield	CARE, Fall Lighting Sale, Payment Options, Conservation	October	Completed
International Daily News, San Francisco	A Pleasant Surprise At The Chinatown Night Market- CARE	October	Completed
Chinese Times, San Francisco	A Pleasant Surprise At The Chinatown Night Market- CARE	October	Completed
Sing Tao Daily, San Francisco	A Pleasant Surprise At The Chinatown Night Market- CARE	October	Completed
China Press, San Francisco	A Pleasant Surprise At The Chinatown Night Market- CARE	October	Completed
World Journal, Millbrae	A Pleasant Surprise At The Chinatown Night Market- CARE	October	Completed
Nuevo Mundo, San Jose	Ahorre, ahora que llega el invierno	November	Completed
Radio KBBF, Santa Rosa	CARE, Fall Lighting Sale, Payment Options, Conservation, Storm Safety, CorDaptix	November	Completed
Univision, KDTV-14, Santa Rosa	CARE, Fall Lighting Sale, Payment Options, Conservation, Storm Safety, CorDaptix	November	Completed
Radio Unica, 1010-AM, KIQI, SF	Payment Options	November	Completed
Chinese Times, SF	Chinatown Night Market Closes, CARE Program Continues	November	Completed
Berkeley Metro Reporter	PG&E Reaching Out To Black Community, Offers CARE Program	November	Completed
San Joaquin Metro Reporter	PG&E Reaching Out To Black Community, Offers CARE Program	November	Completed
Peninsula & San Jose Reporter	PG&E Reaching Out To Black Community, Offers CARE Program	November	Completed
Vallejo Metro Reporter	PG&E Reaching Out To Black Community, Offers CARE Program	November	Completed

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Oakland Metro Reporter	PG&E Reaching Out To Black Community, Offers CARE Program	November	Completed
El Sol, Valle Central	Ahorro de energía y dinero durante el verano	November	Completed
El Sol, Monterey	Ahorre energía eléctrica y dinero durante el invierno	December	Completed
Sing Tao Daily, SF	Energy saving and safety tips for Christmas lights and decorations	December	Completed
San Francisco Bay View Newspaper	Power at a discount	December	Completed
Sing Tao Daily, SF	PG&E Offers Money and Energy Saving Tips	December	Completed
En Contacto, Telemundo, KCSO-33, Stockton	CARE, Holiday Lighting Safety Tips, Payment Assistance Programs	December	Completed
China Press, SF	Pacific Gas and Electric Company Helps Consumers Learn How To Save Energy and Money	December	Completed
Cali Today	Pacific Gas and Electric Company Helps Consumers Learn How To Save Energy and Money	December	Completed
Sing Tao Daily, SF	PG&E Teaches You How To Save Money, Reaches Out To Low Income Homes, & Offers Savings and Safety Tips	December	Completed
Sing Tao Daily, SF	Pacific Gas and Electric Company Helps Consumers Learn How To Save Energy and Money	December	Completed
Philippine News, SF	PG&E teaches consumers how to save energy, money	December	Completed
Korea Central Daily, SF	Pacific Gas and Electric Company Helps Consumers Learn How To Save Energy and Money	December	Completed
Feel The Energy	PG&E CARE Program	December	Completed

Abbreviations

CARE - California Alternate Rates for Energy

LIEE - Low Income Energy Efficiency Program

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

SIRS - Sons in Retirement

RCP - Residential Contractor Program

CFL - Compact Fluorescent Light

HEAP - Home Energy Assistance Program (federal program)

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