



***Pacific Gas and  
Electric Company™***

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Witnesses: Various

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**PACIFIC GAS AND ELECTRIC COMPANY**

**2003 ANNUAL EARNINGS ASSESSMENT PROCEEDING**

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**VOLUME IV**

**LOW INCOME ENERGY EFFICIENCY PROGRAM ANNUAL REPORT  
FOR 2002**

**AND**

**LOW INCOME ENERGY EFFICIENCY PROGRAM ANNUAL REPORT  
FOR 2002 TECHNICAL APPENDIX**

**LOW INCOME ENERGY EFFICIENCY PROGRAM  
ANNUAL REPORT  
FOR 2002**

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*May 2003*



**Pacific Gas and Electric Company**

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## SECTION 1

### EXECUTIVE SUMMARY

#### Low Income Energy Efficiency (LIEE)

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PG&E has offered energy efficiency programs to qualifying low income customers in its 47 counties since 1983. The Low Income Energy Efficiency (LIEE) program objective is to help low income customers increase their comfort while reducing their energy consumption, costs, and hardship. The LIEE program provides free home weatherization, energy-efficient appliances and energy education services to qualified, low income PG&E customers throughout the Company's service area. PG&E has treated almost 470,000 homes over the last decade, and over 425,000 of those homes received weatherization measures.

The 2002 LIEE program continued the 2001 Rapid Deployment Low Income Energy Efficiency program unchanged per the Assigned Commissioner Ruling regarding post-2001 program planning for low income assistance programs, dated February 27, 2002. The 2002 program treated 70,683 homes, 41,323 of which were weatherized. This resulted in energy reductions of 43.115 million kWhs and 1.25 million therms.

The 2002 LIEE program required installation of all feasible measures offered under the program for which the customer qualified. PG&E continued to work with the other investor owned utilities, the Energy Division and the Office of Ratepayer Advocates (ORA) to standardize the LIEE program implementation and reporting statewide.

PG&E implemented a Go-Back component of the Rapid Deployment LIEE program in 2001 and 2002. RHA, PG&E's LIEE program administrator, initiated several agreements to deliver refrigerators to qualified low income customers under Rapid Deployment. Under this Rapid Deployment initiative, measures were installed in previously weatherized homes that were not eligible for refrigerators and evaporative coolers at the time they were originally weatherized. Often this was because either the refrigerator was not old enough to be replaced or because the participant was a renter and therefore ineligible. There were 16,881 previously-treated PG&E LIEE participants who received 6916 refrigerators, 5,730 evaporative coolers and 67,042 CFLs under the Go-Back initiative in 2002.

PG&E began several outreach and leveraging initiatives targeting specific low-income populations in 2001, in response to D.01-05-033 Rapid Deployment mandates and continued them in 2002. Two agreements were signed with Community-Based Organizations (CBOs) to leverage delivery of PG&E refrigerators under the LIEE program with the State's Weatherization Program. PG&E, through its administrator, entered into an agreement with La Cooperativa Campesina, a consortium of CBOs and Community Action Agencies targeting Spanish-speaking agricultural workers, which had received funding from the

California Department of Community Services and Development (CSD) as a result of the energy crisis. The CSD funded start up costs and customer education and PG&E provided refrigerators, and compact fluorescent lamps. Based on this leveraged activity, La Cooperativa agencies were able to refer several thousand customers to PG&E who were eligible for refrigerators, evaporative coolers, and CFLs. These services were delivered in 2001 and 2002. There were 5,535 qualifying PG&E low income customers who received 5,535 refrigerators, and 45,030 CFLs under the Leveraging Initiative in 2002.

PG&E did not achieve its Minimum Performance Standard (MPS) during 2002 and thus requests no shareholder incentives for 2002 LIEE activities.

## **SECTION 2**

# **LOW INCOME ENERGY EFFICIENCY**

### **Overview**

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PG&E has offered energy efficiency programs to qualifying low income customers in its 47 counties since 1983. The LIEE program objective is to help low income customers increase their comfort while reducing their energy consumption, costs, and hardship. The LIEE program provides free home weatherization, energy-efficient appliances and energy education services to qualified, low income PG&E customers throughout the Company's service area. PG&E has treated almost 470,000 homes over the last decade, and over 425,000 of those homes received weatherization measures.

In May 2001, Decision (D.) 01-05-033 adopted a "Rapid Deployment" LIEE program to quickly maximize peak load savings and bill savings to low income customers during the California energy crisis. The 2002 LIEE program continued the 2001 Rapid Deployment LIEE program unchanged per the Assigned Commissioner Ruling regarding post-2001 program planning for low income assistance programs, dated February 27, 2002.

The 2002 LIEE program required installation of all feasible measures offered under the program for which the customer qualified. PG&E continued to work with the other investor-owned utilities, the Energy Division and the Office of Ratepayer Advocates (ORA) to standardize the LIEE program implementation and reporting statewide.

In accordance with Assembly Bill (AB) 1393 and D. 01-05-033, measures offered under the 2002 LIEE program included attic insulation, water heater blankets, energy-efficient showerheads, door weather stripping, caulking, minor home repairs that affect air infiltration, attic access weather stripping, evaporative cooler covers, reusable furnace filters, outlet gaskets, water heater pipe wrap, faucet aerators, compact fluorescent lamps, hard-wired porch light fixtures, evaporative coolers, energy-efficient refrigerators, and furnace repair and replacement for homeowners whose homes failed the combustion appliance safety test. Air conditioners, duct seal and repair, gas and electric water heaters, set-back thermostats, evaporative cooler maintenance, and whole house fans were added to the program in May 2001 under the Rapid Deployment program. Additionally, the Rapid Deployment program made hard-wired porch light fixtures, refrigerators and evaporative coolers available to qualifying renters where the landlords owned the refrigerators or evaporative coolers.

Energy education was provided to all participating customers to help them understand how they used energy and what specific strategies they could employ to reduce their energy costs.

PG&E bid out administration and implementation contracts for the 2001 program. Richard Heath and Associates was awarded the LIEE administration contract and began work in that role on May 1, 2001. They continued to administer the 2002 LIEE program.

## Low Income Energy Efficiency (LIEE) Program

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### 2002 PROGRAM ELEMENTS

The LIEE program was implemented by community-based organizations and private contractors who were assigned specific geographic areas (often a county) within PG&E's service area. LIEE contractors had specific participation goals defined by the estimated number of LIEE-qualifying customers living in their assigned geographic areas.

Energy education and CFL installations were performed during the initial home assessment visit. Following approval of the assessed measures, PG&E's weatherization contractors installed all feasible LIEE program measures for which a home qualified *except* refrigerators and evaporative coolers, which were delivered and installed by a separate appliance contractor after the weatherization contractor's work was completed.

#### ***Energy Education***

In 2002, PG&E continued to offer energy education during the first home visit.

The first visit by an energy education specialist assisted the customer with a California Alternate Rates for Energy (CARE) application and/or Home Energy Assistance Program (HEAP) contact information if applicable. The energy education specialist also informed low income customers about other low income programs to help them control their energy bills. Additionally, customers received an energy cost calculator. The energy education specialist showed the customer how to use the cost calculator wheel to calculate their current energy expenditures by measure or type of appliance to help them reduce their overall energy usage. The customers were asked to adopt at least three energy saving practices which would result in overall reduced energy usage and increased comfort.

Approximately 25 percent of all customers served received a follow-up phone communication addressing customer satisfaction with the program and answering any questions they might have.

#### ***Appliance Replacement***

Refrigerator replacement was restricted to customers whose refrigerators were at least 10 years old. Several refrigerator sizes were provided. They ranged from 12 cubic feet to 23 cubic feet and were offered to customers based on existing refrigerator size and the number of refrigerators/freezers removed. Additionally, in the event that a disabled customer needed a specific type of refrigerator, PG&E made special provisions for those requests. The refrigerator replacement service

included delivery, installation, removal and environmentally safe recycling of the inefficient units being replaced. Rapid Deployment made refrigerator replacement available to low income tenants who did not own the refrigerators in their dwellings.

Evaporative coolers were provided to customer dwellings where the home had existing air conditioning and the addition of an evaporative cooler could lower the customer's consumption of energy. Under the Rapid Deployment program, evaporative coolers were available to both homeowners and renters.

Furnace repair and replacement was provided to customer-owned homes that failed the combustion appliance safety test. Furnace repair and replacement was available only to homeowners, since providing functional heating is the legal responsibility of the landlord.

### ***2002 LIEE Rapid Deployment Program Activities***

D. 01-05-033 added all PG&E's past unspent LIEE program carryover funding to the Company's 2001 base funding, increasing PG&E's total funding for the 2001 LIEE Rapid Deployment program from \$29 million to \$60 million. Restrictions prohibiting fund shifting between the various weatherization and energy efficiency measures were eliminated.

The 2002 Low Income Energy Efficiency program continued the 2001 Rapid Deployment Low Income Energy Efficiency program unchanged per the Assigned Commissioner Ruling regarding post-2001 program planning for low income assistance programs, dated February 27, 2002. LIEE program funds unspent by year-end 2001 were added to PG&E's authorized annual \$29 million base funding for PY 2002, representing a \$60.523 million budget for 2002.

By the end of July 2002, PG&E program managers determined that the LIEE PY 2002 funding was fully committed. Effective August 1, 2002, PG&E stopped accepting new commitments for the LIEE program until authorization to continue could be obtained from the Commission. PG&E was authorized to continue program operations in the Assigned Commissioner Ruling directing PG&E to respond to Emergency Motion Regarding Suspension of the Low Income Energy Efficiency Weatherization Program, dated August 20, 2002. Resolution G-3340, dated September 19, 2002, directed PG&E to record expenditures over the authorized budget into a memorandum account. As of December 31, 2002, PG&E recorded \$62.270 million total costs for 2002.

### ***Targeted Market and/or End-Uses***

Low income customers who met CARE income guidelines of 175 percent of the Federal Poverty Income Guidelines or 200 percent for low income customers with heads of household who are 60+ years old and/or disabled, with income adjustments for family size, were targeted for this program. (CARE and base LIEE income guidelines increased in June 2001 from 150 percent of the Federal Poverty Income Guidelines to 175 percent, per D. 01-06-010.)



### ***Implementation Strategy***

In 2002, low income customers who experienced problems paying their PG&E bill or requested energy efficiency assistance were referred to PG&E's Smarter Energy Line (SEL) for pre-qualification and inclusion into the program. To increase CARE participation and make customers aware of the services provided by PG&E to low income customers, PG&E required contractors to market the LIEE program to CARE customers and customers requesting weatherization services. Customers were made aware of and, upon request, assisted in filing out a CARE program application.

Additionally, PG&E signed capitation outreach contracts with 82 service providers to enroll qualifying customers in the CARE program. In addition to signing up new CARE customers, capitation outreach contractors told CARE customers about the LIEE program services available at no cost to them and gave them literature about the LIEE program including phone numbers to call to participate.

### ***LIEE Rapid Deployment Go-Back Initiative***

Under LIEE standardization rules, homes that were treated under the LIEE program within the past 10 years were generally not eligible for participation in the current program, although exceptions could be granted with the written approval of the utility administrator's program manager.<sup>1</sup> D. 01-05-033 granted utility administrators the flexibility to send service providers back to treated homes to install the new measures adopted under the Rapid Deployment program. Other load reduction measures that were not offered at the time the home was treated and would contribute significantly to bill savings (e.g., refrigerator replacements) could also be installed under the Rapid Deployment program. D. 01-05-033 granted an "automatic exception" to revisiting previously treated homes for these measures during the rapid deployment period.

PG&E implemented a Go-Back component of the Rapid Deployment LIEE program in 2001 and 2002. RHA, PG&E's LIEE program administrator, initiated several agreements to deliver refrigerators to qualified low income customers under Rapid Deployment. Agreements were signed to deliver refrigerators and evaporative coolers to qualifying customers under the Go-Back initiative. Under this Rapid Deployment initiative, measures were installed in previously weatherized homes that were not eligible for refrigerators and evaporative coolers at the time they were originally weatherized. Often this was because either the refrigerator was not old enough to be replaced or because the participant was a renter and therefore ineligible.

There were 16,881 previously treated PG&E LIEE participants who received 6,916 refrigerators, 5,730 evaporative coolers and 67,042 CFLs under the Go-Back initiative in 2002.

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<sup>1</sup> See D.01-03-028, mimeo., p. 16 and Attachment 3.

### ***LIEE Rapid Deployment Leveraging Initiatives***

PG&E began several outreach and leveraging initiatives targeting specific low income populations in 2001, in response to D. 01-05-033 Rapid Deployment mandates. Two agreements were signed with Community-Based Organizations (CBOs) to leverage delivery of PG&E refrigerators under the LIEE program with the State's Weatherization Program. For example, PG&E, through its administrator, entered into an agreement with La Cooperativa Campesina, a consortium of CBOs and Community Action Agencies targeting Spanish-speaking agricultural workers, which had received funding from the California Department of Community Services and Development (CSD) as a result of the energy crisis. The CSD funded start up costs and customer education and PG&E provided refrigerators, and compact fluorescent lamps. Based on this leveraged activity, La Cooperativa agencies were able to refer several thousand customers to PG&E who were eligible for refrigerators, evaporative coolers, and CFLs. These services were delivered in 2001 and 2002.

There were 5,535 qualifying PG&E low income customers who received 5,535 refrigerators, and 45,030 CFLs under the Leveraging Initiative in 2002.

Additionally, PG&E program staff made hundreds of presentations to community groups and local ethnic media throughout PG&E's service area. PG&E program staff also participated in several county or area-wide low income agency working groups, such as the Sacramento Community Housing Coalition, to share information on PG&E programs with community service providers.

### ***Major Accomplishments***

PG&E's Rapid Deployment efforts began to produce strong results by the end of 2001, after a slow start following the program's implementation in May 2001. By 2002, the Rapid Deployment Program was fully ramped up. LIEE program results (including Rapid Deployment) for 2002 are shown in detail in Technical Appendix Tables TA 4, TA 5 and TA 7. Highlights of the completed<sup>2</sup> accomplishments are as follows:

- Treated<sup>3</sup> 70,683 homes;
- Weatherized<sup>4</sup> 41,323 homes;
- Provided energy education in 56,698 homes;
- Replaced primary refrigerators in 24,719 homes

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<sup>2</sup> Installations and services are not counted as "completed" until they have been paid, per agreement at 11/6/02 and 11/13/02 RRM Rapid Deployment Monthly Reporting Compliance meetings.

<sup>3</sup> A "treated" home is an income-qualified home that has received any measure or service under the LIEE program, including energy education, CFLs, weatherization and appliances (D.02-12-019). Under the LIEE program, a treated home must receive all feasible measures for which it qualifies.

<sup>4</sup> "Weatherized" homes are a subset of "treated" homes, and are defined as income-qualified homes that have received any weatherization measures under the LIEE program (D.02-12-019). Weatherization measures include attic insulation, caulking, weather-stripping, low flow showerheads, water heater blankets and door and building envelope repairs which reduce infiltration (D.01-12-020).

- Provided evaporative coolers in 15,968 homes
- Installed 344,394 compact fluorescent lamps;
- Repaired or replaced furnaces in 962 homes; and
- Installed rapid deployment measures including:
  - 442 air conditioners;
  - 765 water heaters;
  - 4,282 set-back thermostats,
  - 89 duct sealing and repair and
  - 99 whole house fans.

## **2003 PROGRAM ELEMENTS**

The 2003 LIEE program continues the 2002 Rapid Deployment LIEE program unchanged per the February 27, 2002 Assigned Commissioner Ruling regarding post-2001 program planning for low income assistance programs. After finding that the rapid deployment strategy has been successful in substantially increasing the deployment of low income assistance services to those that have needed it the most during the energy crisis, D. 02-07-033 authorized the continuation of the rapid deployment programs adopted in D. 01-05-033 until further Commission order. This was reiterated in D. 02-12-019, Ordering Paragraph 2, which also increased PG&E's authorized annual LIEE program budget to \$56.530 million for 2003.

PG&E continues its program administrator contract with Richard Heath and Associates for the 2003 LIEE program. Contracts to implement the program were also continued and are assigned to the LIEE administrator. Additionally, the LIEE administrator may bid out further work by county/project areas as needed.

PG&E continues to work with the Utility LIEE Standardization Team to standardize the LIEE program among utilities on a statewide basis. In Phases 1-3, the Team successfully standardized the Weatherization Installation Standards Manual and the Policy and Procedures Manual for the Statewide LIEE program. In Standardization Phase 4, the Team implemented studies of Natural Appliance Safety Testing and of program and measure Cost Effectiveness.

### ***Shareholder Incentives for Low Income Activities***

PG&E assumes that the shareholder mechanism for 2001 will continue to be used, since the 2003 program is a continuation of the 2001 and 2002 Rapid Deployment programs.

## **Measurement and Evaluation (M&E) and Regulatory Oversight for Low Income Activities**

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PG&E conducted studies as directed by the Commission to report the results of LIEE program activities. PG&E also participated on several statewide LIEE teams with the purpose of standardizing LIEE programs and utility reporting to the Commission.

### ***Measurement and Evaluation***

Low income measurement and evaluation activities completed in 2002 include a Statewide First Year Load Impact Study of the 2000 LIEE Programs completed in April 2002 and a Statewide LIEE Process Evaluation filed on May 1, 2003, by Southern California Edison Company (SCE) on behalf of PG&E, SCE, San Diego Gas and Electric Company (SDG&E) and Southern California Gas Company (SoCalGas).

PG&E also completed and filed twelve Rapid Deployment Monthly Reports detailing LIEE Rapid Deployment program activities, impacts and expenditures through December 31, 2002, as directed in D. 01-05-033.

PG&E will use the results of these studies and reports as appropriate to augment and refine future programs.

### ***Utility Standardization***

PG&E also participated in the Phase 3 and 4 Low Income Utility Standardization Project to complete the Statewide LIEE Policy and Procedures Manual and Statewide Weatherization Installation Standards, and conduct a study on refrigerator grounding. PG&E will continue to work with the other utilities, the Energy Division, and ORA on the Phase 4 Utility Standardization Project to study carbon monoxide testing, program and measure cost effectiveness assessments and other studies as directed by the Commission.

### ***Reporting Requirements Manual***

The Assigned Commissioner Ruling dated April 28, 2000 directed the RRM Working Group to file a report revising the Reporting Requirements Manual (RRM) low income sections to standardize reporting requirements and administrative costs. The RRM Working Group includes PG&E, SDG&E, SCE, SoCalGas, the Energy Division, ORA, and other interested parties. The RRM Working Group filed the Phase 1 RRM Report on October 2, 2000. D. 01-03-028 adopted the revised reporting requirements and directed that they be used by the utilities to report the results of the 2000 LIEE programs. The RRM Working Group has filed two revisions since filing the first report: the Phase II RRM Report on April 9, 2001 incorporated definitions from the Bill Savings Report filed March 15, 2001, and the January 10, 2002 RRM Report revised RRM sections in compliance with the Commission's directives in D. 01-12-020, Ordering Paragraph 11. The RRM tables are included in this filing.

PG&E filed monthly reports detailing its PY 2002 LIEE Rapid Deployment activities. PG&E worked with SDG&E, SCE, SoCalGas, the Energy Division, and ORA to develop a common set of monthly reporting tables in compliance with D. 01-05-033, Ordering Paragraphs 2 through 7.

In December 2002, PG&E, SDG&E, SCE, SoCalGas, the Energy Division, and ORA determined that the measure payment (or expense) date would be the basis for reporting 2003 LIEE activities and expenditures.

For reporting purposes, PG&E counted a home as treated as soon as it has received any service or measure under the LIEE program. The home is counted as completed following installation of all measures installed by the weatherization contractor. PG&E's weatherization contractors installed all feasible LIEE program measures for which a home qualified *except* refrigerators and evaporative coolers, which were delivered and installed by a separate appliance contractor after the weatherization contractor's work was completed.

### ***Cost-Effectiveness Tests***

PG&E included results of the Total Resource Cost Test (TRC), the Utility Cost (UC) Test and the modified Participant Cost (PC<sub>m</sub>) Test for 2002 LIEE programs in Table 2.3.

In D. 00-09-036, the Commission stated its expectations that the RRM Working Group would develop specific modifications to the cost effectiveness tests for low income programs. The Low Income Public Purpose Test (LIPPT) Report was filed on April 9, 2001, as part of the RRM Working Group Phase 2 Report. In compliance with the directives of D. 01-03-028, the LIPPT incorporated non-energy benefits (NEBs) including comfort, health and safety into the cost-effectiveness testing methodology.

D. 01-12-020 adopted the NEBs proposed in the LIPPT report but ordered that the RRM Working Group and the Standardization Team work together to develop a methodology for incorporating them into the Participant and Utility Cost Tests to assess the LIEE program and individual measures.

The Joint RRM Working Group and Standardization Team Cost Effectiveness Subcommittee filed its report and recommendations for using the results of the UC and PC<sub>m</sub> Tests to assess LIEE program and measure cost effectiveness on April 10, 2002.

On September 30, 2002 the Standardization Team submitted a report on the cost effectiveness of LIEE programs and individual measures.<sup>5</sup> D. 02-12-019 ordered the utilities to work with the Standardization Team to revise the results of measure cost effectiveness to comply with the adopted 2003 LIEE program budgets and measure cost assumptions for each individual utility. The Standardization Team filed *The Joint Utilities Revised Results of Measure Cost-Effectiveness* on January 6, 2003. PG&E measure costs were based on PG&E's costs of installed measures

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<sup>5</sup> *LIEE Measure Cost Effectiveness*, filed by the LIEE Standardization Team September 30, 2002.

for 2002 from January through August, with a few exceptions. Room air conditioner, wall air conditioner, duct sealing and testing, furnace repair, furnace replacement, whole house fan, water heater replacement, and refrigerator costs were based on selected contractor and retail data. CFL and programmable thermostat costs were based on expected negotiated costs with contractors.

PG&E continues to work with the Standardization Team to assess measure cost effectiveness in order to recommend what measures to retain for the 2004 LIEE program.

## Energy-Related Hardship

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The Energy-Related Hardship subsection describes how PG&E's LIEE program attempted to mitigate Energy-Related Hardship according to the following definition.

Low income energy efficiency programs recognize the limited financial resources and access that might hinder low income customer participation in conventional energy conservation programs. The intent was to create equity for customers who might not be able to take advantage of energy efficiency measures or otherwise manage their energy costs, thereby relieving the energy-related difficulties faced by low income customers. The following definition seeks to characterize "hardship" as it relates to customers participating in low income energy efficiency programs.

Energy-related hardship is defined as adverse impacts on the comfort, health, and safety of low income customers that can be mitigated by access to low income energy efficiency programs and services.

Within the context of this definition, the following adverse elements of hardship can be mitigated:

- *Comfort* - Reduce energy-related stress resulting from inadequate control over ambient climate or temperature due to insufficient energy efficiency measures or uninformed decision making on energy use, thereby promoting effective energy management behaviors.
- *Health* - Enhance physical and mental well being through improved ambient temperature and increased dwelling unit protection from weather-related elements.
- *Safety* - Increase home and personal security through the application of energy efficiency measures.<sup>6</sup>

PG&E participated in the LIPPT study to develop a cost effectiveness test that incorporated these hardship benefits and other non-energy benefits (NEBs). The LIPPT Report was filed by the RRM Working Group on May 25, 2001, in

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<sup>6</sup> Reporting Requirements Manual (RRM) Working Group – Revised RRM Sections for Low Income Assistance Programs, in R. 01-08-027, January 10, 2002.

compliance with D. 01-03-028, Ordering Paragraph 15. D. 01-12-020 adopted the NEBs, although not the LIPPT. D. 01-12-020, Ordering Paragraph 9 ordered the RRM Working Group together with the Standardization Team to apply the adopted NEBs to the Participant Cost Test and the Utility Cost Test.

The RRM Working Group and the Standardization Team formed a Joint Cost Effectiveness Subcommittee to develop a methodology for applying NEBs to the two tests. PG&E participated in the Joint Cost Effectiveness Subcommittee and filed the Subcommittee report describing the two tests developed on behalf of the Subcommittee on April 10, 2002. The cost effectiveness results reported in Tables 3 and 4 are consistent with the methodology developed by the Joint Cost Effectiveness Subcommittee.

## **Access to Programs Provided by Community-Based Providers**

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In D. 00-07-020, the Commission directed the utilities to report on the access of their low income program participants to programs provided by community service providers, consistent with the intent of the Legislature in Public Utilities Code § 381.5(a).

This section describes PG&E's referral system between the CARE program and Low Income Home Energy Assistance Program (LIHEAP). PG&E met the requirements for the state to qualify for financial leveraging of federal funds. In addition, the system is in place for identifying the needs of LIEE program participants and directing them to CBOs and other low income community agencies that can address their needs.

The number of CBOs participating in the LIEE program as contractors or subcontractors as well as the percentage of units treated by CBOs and non-CBOs are reported in Table TA 6.

During 2002, PG&E actively pursued leveraging and outreach opportunities with other State and local agencies offering low income services, including the California Department of Community Services and Development (CSD) which provides LIHEAP services in California. In addition, PG&E continued to increase outreach and leveraging within the company, coordinating activities and advertising with other PG&E energy efficiency programs likely to reach low income customers and service providers. PG&E's LIEE contractors were required to leverage the LIEE program and report leveraging activities monthly.

PG&E also entered into an agreement with La Cooperativa Campesina, a group of CBOs targeting agricultural workers, which had received funding from the California Department of Community Services and Development (CSD) as a result of the energy crisis. The CSD funded start up costs and customer education and PG&E provided refrigerators and compact fluorescent lamps. Based on this

leveraged activity, La Cooperativa agencies were able to refer several thousand customers to PG&E who were eligible for refrigerators and CFLs.

PG&E employees regularly made presentations about the Company's Low Income and Hard-to-Reach programs to the media and at community events throughout the PG&E service area. These presentations were used to educate consumers about energy efficiency and inform them about assistance programs and opportunities available to them through PG&E. PG&E employees made 104 presentations about LIEE and CARE in Spanish, Chinese and other languages. These presentations reached 4,018 customers.

Attachment A summarizes PG&E leveraging and outreach activities during 2002.

## **Bill Savings**

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This section discusses updates to the variables and calculations used in preparing the applicable standard tables in the Technical Appendix for this program area.

PG&E, SCE, SDG&E and SoCalGas filed the "Joint Utility Low Income Energy Efficiency 2002 Costs and Bill Savings Standardization Report" on behalf of PG&E, SCE, SDG&E and SoCalGas on May 1, 2003, in the Low Income Rulemaking proceeding, R. 01-08-027. The report calculates, compares and explains differences in the annual bill savings achieved by each utility for 2000, 2001, and 2002. In compliance with Ordering Paragraph 4 of D. 01-12-020, the Joint Utility Report is incorporated by reference in this Annual Report. Monthly bill savings are reported by the utilities in their Monthly Rapid Deployment Reports.

## **Shareholder Performance Incentives for Low Income Activities**

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Utilities are eligible for shareholder incentives based on the criteria described below. PG&E is not eligible for shareholder incentives for 2002 low income activities and makes no claim for 2002 earnings in this AEAP.

### ***Shareholder Incentives for 2002 Low Income Activities***

The 2002 LIEE program provided shareholder incentives based on the 2001 LIEE shareholder incentive mechanism adopted in D. 01-06-082.

The shareholder incentive provided a flat 2% management fee on actual LIEE program expenditures, not including shareholder earnings, provided that the Minimum Performance Standard (MPS) was achieved during calendar year 2001. The MPS was equal to 100% of the first-year savings goals for Big Six measures, as verified in the AEAP with actual program participation levels. PG&E's MPS for the 2002 LIEE program was 2,139,056 kWh and 1,198,319 therms. For purposes of this incentive mechanism, the Big Six measures consisted of attic



insulation, caulking, weather stripping, low flow showerheads, water heater blankets, and door and building envelope repairs that reduce infiltration.

Recovery of LIEE incentives takes place in two equal installments. The first 50% installment will be included in the first AEAP proceeding in which the Commission conducts an assessment of actual program participation levels and expenditures for 2002. The remaining 50% of the earnings claim will be authorized for recovery in the AEAP proceeding following the completion of a first-year load impact study for 2002. The load impact study will not affect the amount of earnings claim recovery, but rather will be used to guide future program development.

PG&E did not achieve its MPS during 2002 and thus requests no shareholder incentives for 2002 LIEE activities.

**TABLE 2.1**  
**SUMMARY OF COSTS: LOW INCOME - PG&E**  
**Electric and Gas Combined**  
**(\$)**

	2002		2003
LIEE Programs	Budgeted	Recorded <sup>7</sup>	Budgeted
Energy Efficiency			
Gas Appliances	2,500,000	1,412,495	3,841,814
Electric Appliances <sup>7</sup>	16,993,065	22,208,064	21,681,419
Weatherization Measures	22,000,000	21,059,030	15,818,472
Outreach & Assessment	3,000,000	3,818,107	1,926,250
In Home Energy Education	4,000,000	3,219,266	1,926,250
Education Workshops	100,000	8,098	54,513
<b>Energy Efficiency TOTAL</b>	<b>48,593,065</b>	<b>51,725,060</b>	<b>45,248,718</b>
Pilots			
Leveraging Pilot			500,000
Attic Venting	35,000	44,624	0
Landlord Rebate	2,100,000	408,347	406,350
Phase 4 Pilot	0	90,052	0
<b>Total Pilots</b>	<b>2,135,000</b>	<b>543,024</b>	<b>906,350</b>
Training Center	300,000	191,061	300,000
Inspections	2,360,000	3,248,611	2,703,804
Advertising	0	0	92,000
M&E Studies <sup>1</sup>	300,000	108,876	525,786
Regulatory Compliance <sup>2</sup>	800,000	674,091	400,813
Other Administration <sup>3</sup>	6,000,000	5,739,773	6,317,529
Indirect Costs <sup>4</sup>	3,000,000	3,329,716	4,273,428
Oversight Costs			
LIOB Expense	0	0	0
CPUC Energy Division	35,000	39,093	35,000
<b>Total Oversight Costs</b>	<b>35,000</b>	<b>39,093</b>	<b>35,000</b>
Shareholder Incentives <sup>5</sup>	NA	NA	NA
<b>TOTAL COSTS<sup>6</sup></b>	<b>60,523,065</b>	<b>62,269,590</b>	<b>56,530,000</b>

## Notes:

1. M&E Studies include: Bill Savings Report, Cost Effectiveness Study, and Joint Utility Impact Evaluation
2. Regulatory Compliance includes LIEE Standardization, RRM Working Group Report, CBO Access and Leveraging Report and Monthly CPUC Reports.
3. Other Administration includes PG&E's program management and Prime contractor's management.
4. Indirect Costs include Combustion Appliances Safety (CAS) Testing, which is not part of the LIEE budget.
5. Shareholder Incentives are not included in the LIEE budget. No shareholder claim is made for PY 2002.
6. Total costs do not include Combustion Appliance Safety (CAS) testing and Shareholder incentives since they are not part of the LIEE budget. Costs do include overheads.
7. Commitments of \$732,876 for refrigerators and evaporative coolers were included as recorded expenses in the 2002 AEAP. These have been deducted from the Electric Appliance Recorded Costs to avoid double counting.

**TABLE 2.1**  
**SUMMARY OF COSTS: LOW INCOME - PG&E**  
**Electric**  
**(\$)**

	2002		2003
	Budgeted	Recorded <sup>6</sup>	Budgeted
<b>LIEE Programs</b>			
<b>Energy Efficiency</b>			
Gas Appliances	0	0	0
Electric Appliances <sup>6</sup>	16,993,065	22,208,064	21,681,419
Weatherization Measures	5,500,000	10,578,020	3,739,571
Outreach & Assessment	1,890,000	2,194,556	1,194,275
In Home Energy Education	2,520,000	1,863,528	1,194,275
Education Workshops	63,000	5,780	33,798
<b>Energy Efficiency TOTAL</b>	<b>26,966,065</b>	<b>36,849,948</b>	<b>27,843,338</b>
<b>Pilots</b>			
Leveraging Pilot			310,000
Attic Venting	22,050	28,402	0
Landlord Rebate	2,100,000	408,347	406,350
Phase 4 Pilot	0	0	0
<b>Total Pilots</b>	<b>2,122,050</b>	<b>436,749</b>	<b>716,350</b>
Training Center	189,000	128,873	186,000
Inspections	1,486,800	2,095,310	1,676,358
Advertising	0	0	57,040
M&E Studies <sup>1</sup>	189,000	56,705	325,987
Regulatory Compliance <sup>2</sup>	504,000	392,535	248,504
Other Administration <sup>3</sup>	3,780,000	3,597,440	3,916,868
Indirect Costs	0	0	0
<b>Oversight Costs</b>			
LIOB Expense	0	0	0
CPUC Energy Division	22,050	24,629	21,700
<b>Total Oversight Costs</b>	<b>22,050</b>	<b>24,629</b>	<b>21,700</b>
Shareholder Incentives <sup>4</sup>		NA	NA
<b>TOTAL COSTS<sup>5</sup></b>	<b>35,258,965</b>	<b>43,582,187</b>	<b>34,992,145</b>

**Notes:**

1. M&E Studies include: Bill Savings Report, Cost Effectiveness Study, and Joint Utility Impact Evaluation
2. Regulatory Compliance includes LIEE Standardization, RRM Working Group Report, CBO Access and Leveraging Report and Monthly CPUC Reports.
3. Other Administration includes PG&E's program management and Prime contractor's management.
4. Shareholder Incentives are not included in the LIEE budget. No shareholder claim is made for PY 2002.
5. Total costs do not include Combustion Appliance Safety (CAS) testing since they are not part of the LIEE budget. Costs do include overheads.
6. Commitments of \$732,876 for refrigerators and evaporative coolers were included as recorded expenses in the 2002 AEAP. These have been deducted from the Electric Appliance Recorded Costs to avoid double counting.

**TABLE 2.1**  
**SUMMARY OF COSTS: LOW INCOME - PG&E**  
**Gas**  
**(\$)**

LIEE Programs	2002		2003
	Budgeted	Recorded	Budgeted
Energy Efficiency			
Gas Appliances	2,500,000	1,412,495	3,841,814
Electric Appliances	0	0	0
Weatherization Measures	16,500,000	10,481,010	12,078,901
Outreach & Assessment	1,110,000	1,623,551	731,975
In Home Energy Education	1,480,000	1,355,738	731,975
Education Workshops	37,000	2,319	20,715
<b>Energy Efficiency TOTAL</b>	<b>21,627,000</b>	<b>14,875,112</b>	<b>17,405,380</b>
Pilots			
Leveraging Pilot			190,000
Attic Venting	12,950	16,223	0
Landlord Rebate	0	0	0
Phase 4 Pilot	0	90,052	0
Total Pilots	12,950	106,274	190,000
Training Center	111,000	62,189	114,000
Inspections	873,200	1,153,301	1,027,446
Advertising	0	0	34,960
M&E Studies <sup>1</sup>	111,000	52,171	199,799
Regulatory Compliance <sup>2</sup>	296,000	281,557	152,309
Other Administration <sup>3</sup>	2,220,000	2,142,333	2,400,661
Indirect Costs <sup>4</sup>	3,000,000	3,329,716	4,273,428
Oversight Costs			
LIOB Expense	0	0	0
CPUC Energy Division	12,950	14,465	13,300
Total Oversight Costs	12,950	14,465	13,300
Shareholder Incentives <sup>5</sup>	NA	NA	NA
<b>TOTAL COSTS<sup>6</sup></b>	<b>25,264,100</b>	<b>18,687,402</b>	<b>21,537,855</b>

## Notes:

1. M&E Studies include: Bill Savings Report, Cost Effectiveness Study, and Joint Utility Impact Evaluation
2. Regulatory Compliance includes LIEE Standardization, RRM Working Group Report, CBO Access and Leveraging Report and Monthly CPUC Reports.
3. Other Administration includes PG&E's program management and Prime contractor's management.
4. Indirect Costs include Combustion Appliances Safety (CAS) Testing, which is not part of the LIEE budget.
5. Shareholder Incentives are not included in the LIEE budget. No shareholder claim is made for PY 2002.
6. Total costs do not include Combustion Appliance Safety (CAS) testing since they are not part of the LIEE budget.

**TABLE 2.2**  
**SUMMARY OF LIEE PROGRAM EFFECTS -PG&E**

**(Annual Energy Reductions)**

	2002 (Recorded)	2003 (Planned)
mWh (kWh, 000's)	43,115	38,018
mTherm (therm, 000,000's)	1.25	0.94

**TABLE 2.3**  
**SUMMARY OF LIEE COST EFFECTIVENESS - PG&E**  
**(RATIO OF BENEFITS OVER COSTS)**

	2002 (Recorded) <sup>2</sup>			PY 2003 (Planned) <sup>3</sup>		
	Utility Cost Test	Total Resource Cost Test	Modified Participant Test	Utility Cost Test	Total Resource Cost Test	Modified Participant Test
Low Income Energy Efficiency <sup>1</sup>	0.54	0.54	0.95	0.44	0.44	0.81

Notes:

1. Including Non-Energy Benefits.
2. Includes all program expenses recorded in 2002 including CAS testing.
3. Includes all program expenses expected to be recorded in 2003, including CAS testing.

**TABLE 2.4**  
**SUMMARY OF LIEE COST EFFECTIVENESS - PG&E**  
**(NET BENEFITS; \$MILLION)**

	2002 (Recorded) <sup>2</sup>			PY 2003 (Planned) <sup>3</sup>		
	Utility Cost Test	Total Resource Cost Test	Modified Participant Test	Utility Cost Test	Total Resource Cost Test	Modified Participant Test
Low Income Energy Efficiency <sup>1</sup>	(30,067,704)	(30,067,704)	(3,372,027)	(33,553,964)	(33,553,964)	(11,262,955)

Notes:

1. Including Non-Energy Benefits.
2. Includes all program expenses recorded in 2002 including CAS testing.
3. Includes all program expenses expected to be recorded in 2003, including CAS testing.

**LOW INCOME ENERGY EFFICIENCY PROGRAM  
ANNUAL REPORT  
FOR 2002  
TECHNICAL APPENDIX**

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*May 2003*



**Pacific Gas and Electric Company**



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## **TECHNICAL APPENDIX LOW INCOME ENERGY EFFICIENCY**

### **Low Income Energy Efficiency (LIEE)**

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#### ***Reporting Requirements Manual (RRM)***

The Assigned Commissioner Ruling dated April 28, 2000 directed the RRM Working Group to file a report to revise the Reporting Requirements Manual (RRM) low income sections to standardize reporting requirements and administrative costs. The RRM Working Group includes PG&E, SDG&E, SCE, SoCalGas, Energy Division, the Office of Ratepayer Advocates, and other interested parties. The RRM Working Group filed the Phase 1 RRM Report on October 2, 2000. The RRM Working Group has filed two revisions since filing the first report: the Phase 2 RRM Report on April 9, 2001 incorporated definitions from the Bill Savings Report filed March 15, 2001, and the January 10, 2002 RRM Report revised RRM sections in compliance with the Commission's directives in D. 01-12-020, Ordering Paragraph 11. The RRM technical appendix tables are included in this section and describe LIEE program cost estimates used for cost effectiveness, LIEE cost elements, program detail by housing type and heating source, and program detail by measure.

#### ***PY 2002 LIEE Program Achievements***

The energy savings for the PY 2002 LIEE program are based on the results and subsequent analysis of the measurement and evaluation study titled "First Year Load Impact Study of the 1998 Low Income Energy Efficiency Programs for PG&E, San Diego Gas and Electric Company, Southern California Edison Company and Southern California Gas Company" (April, 2000). The energy savings for the Rapid Deployment measures are based on the "Low Income Energy Efficiency Program Standardization Project Phase 3 Report – Appendix G, July 2001." Measures lives come predominantly from the "CALMAC Workshop Report, Table 3: Residential Measures, 9/25/2000."

The avoided costs were taken from the Energy Efficiency Policy Manual, Version 1, prepared by the Energy Division, October 2001 where values exist.

**TABLE TA 1**  
**LIEE PROGRAM COST ESTIMATES USED FOR COST EFFECTIVENESS**  
**PG&E**  
**Electric and Gas Combined**  
**(\$)**

	UTILITY COSTS						IMC <sup>1</sup>
<b>LIEE</b>	Program Expenditures (Recorded) <sup>4</sup>		Admin. <sup>2</sup>	Shareholder Incentives	Other <sup>3</sup>	Total	
	Actual	Committed					
Low Income Energy Efficiency	49,951,490	0	8,988,384	NA	3,329,716	62,269,590	45,177,988

**Electric**  
**(\$)**

	UTILITY COSTS						IMC <sup>1</sup>
<b>LIEE</b>	Program Expenditures (Recorded) <sup>4</sup>		Admin. <sup>2</sup>	Shareholder Incentives	Other	Total	
	Actual	Committed					
Low Income Energy Efficiency	37,889,437	0	5,692,750	NA	0	43,582,187	33,194,431

**Gas**  
**(\$)**

	UTILITY COSTS						IMC <sup>1</sup>
<b>LIEE</b>	Program Expenditures (Recorded)		Admin. <sup>2</sup>	Shareholder Incentives	Other <sup>3</sup>	Total	
	Actual	Committed					
Low Income Energy Efficiency	12,062,052	0	3,295,634	NA	3,329,716	18,687,402	11,983,557

Notes:

1. Incremental Measure Cost.
2. Admin. costs include PG&E program management, inspection and prime contractor's management.
3. Combustion Appliance Safety (CAS) testing costs.
4. Commitments of \$732,876 for refrigerators and evaporative coolers were included as recorded expenses in the 2002 AEAP. These have been deducted from "Program Expenditure (Recorded)" to avoid double counting.

**TABLE TA 2**  
**LIEE COST ELEMENTS - PG&E**  
**Electric and Gas Combined**  
**(\$)**

	2002 Expenditures Recorded by Cost Element			
LIEE Programs	Labor	Non-Labor	Contract	TOTAL
Energy Efficiency				
Gas Appliances	10,427	23,933	1,378,135	1,412,495
Electric Appliances <sup>6</sup>	0	166,002	22,042,062	22,208,064
Weatherization Measures	0	280,709	20,778,321	21,059,030
Outreach & Assessment	4,307	219,787	3,594,013	3,818,107
In Home Energy Education	273,488	274,532	2,671,246	3,219,266
Education Workshops	3,910	3,579	609	8,098
Energy Efficiency TOTAL	292,133	968,541	50,464,386	51,725,060
Pilots				
Attic Venting	1,847	1,163	41,615	44,624
Landlord Rebate	4,467	13,251	390,630	408,347
Phase 4 Pilot	38,875	20,221	30,955	90,052
Total Pilots	45,189	34,635	463,200	543,024
Training Center	50,142	71,289	69,630	191,061
Inspections	1,230,511	1,208,585	809,515	824,137
Advertising	0	0	0	0
M&E Studies <sup>1</sup>	443	(360)	108,172	108,255
Regulatory Compliance <sup>2</sup>	189,015	174,328	311,184	674,528
Other Administration <sup>3</sup>	697,666	721,895	4,320,397	5,739,957
Indirect Costs <sup>4</sup>	3,329,716	0	0	3,329,716
Oversight Costs				
LIOB Expense	0	0	0	0
CPUC Energy Division	0	0	39,094	39,094
Total Oversight Costs	0	0	39,094	39,094
TOTAL COSTS <sup>5</sup>	5,834,814	3,178,913	56,585,578	65,599,305

## Notes:

1. M&E studies include: LIEE Program Evaluations, Bill Savings, and Cost Effectiveness Testing.
2. Regulatory Compliance includes LIEE Standardization, RRM Working Group Report, CBO Access and Leveraging Report, and Monthly CPUC Reports.
3. Includes PG&E's program management and prime contractor's management.
4. Indirect costs include Combustible Appliances Safety (CAS) Testing, which is not part of the LIEE budget.
5. Total costs include CAS Testing, which is not part of the LIEE budget.
6. Commitments of \$732,876 for refrigerators and evaporative coolers were included as recorded expenses in the 2002 AEAP. These have been deducted from the Electric Appliance Recorded Costs to avoid double counting.

**TABLE TA 2**  
**LIEE COST ELEMENTS - PG&E**  
**Electric**  
**(\$)**

LIEE Programs	2002 Expenditures Recorded by Cost Element			
	Labor	Non-Labor	Contract	TOTAL
Energy Efficiency				
Gas Appliances	0	0	0	0
Electric Appliances <sup>6</sup>	0	166,002	22,042,062	22,208,064
Weatherization Measures	0	129,841	10,448,179	10,578,020
Outreach & Assessment	2,714	133,231	2,058,611	2,194,556
In Home Energy Education	153,478	208,197	1,501,854	1,863,528
Education Workshops	2,463	2,933	384	5,780
Energy Efficiency TOTAL	158,655	640,204	36,051,089	36,849,948
Pilots				
Attic Venting	1,163	1,021	26,218	28,402
Landlord Rebate	4,467	13,251	390,630	408,347
Phase 4 Pilot	0	0	0	0
Total Pilots	5,630	14,271	416,848	436,749
Training Center	31,589	53,416	43,867	128,873
Inspections	735,301	943,841	416,167	2,095,310
Advertising	0	0	0	0
M&E Studies <sup>1</sup>	279	(321)	56,330	56,288
Regulatory Compliance <sup>2</sup>	119,023	139,851	133,844	392,718
Other Administration <sup>3</sup>	418,109	549,446	2,630,118	3,597,673
Indirect Costs <sup>4</sup>	0	0	0	0
Oversight Costs				
LIOB Expense	0	0	0	0
CPUC Energy Division	0	0	24,629	24,629
Total Oversight Costs	0	0	24,629	24,629
<b>TOTAL COSTS<sup>5</sup></b>	<b>1,468,586</b>	<b>2,340,708</b>	<b>39,772,892</b>	<b>43,582,187</b>

## Notes:

1. M&E studies include: LIEE Program Evaluations, Bill Savings, and Cost Effectiveness Testing.
2. Regulatory Compliance includes LIEE Standardization, RRM Working Group Report, CBO Access and Leveraging Report, and Monthly CPUC Reports.
3. Includes PG&E's program management and prime contractor's management.
4. Indirect costs include Combustible Appliances Safety (CAS) Testing, which is not part of the LIEE budget.
5. Total costs include Combustion Appliance Safety (CAS) Testing, which is not part of the LIEE budget.
6. Commitments of \$732,876 for refrigerators and evaporative coolers were included as recorded expenses in the 2002 AEAP. These have been deducted from the Electric Appliance Recorded Costs to avoid double counting.

**TABLE TA 2**  
**LIEE COST ELEMENTS - PG&E**  
**Gas**  
**(\$)**

LIEE Programs	2002 Expenditures Recorded by Cost Element			
	Labor	Non-Labor	Contract	TOTAL
Energy Efficiency				
Gas Appliances	10,427	23,933	1,378,135	1,412,495
Electric Appliances	0	0	0	0
Weatherization Measures	0	150,868	10,330,142	10,481,010
Outreach & Assessment	1,594	86,556	1,535,402	1,623,551
In Home Energy Education	120,010	66,335	1,169,392	1,355,738
Education Workshops	1,447	647	225	2,319
Energy Efficiency TOTAL	133,478	328,338	14,413,296	14,875,112
Pilots				
Attic Venting	683	142	15,398	16,223
Landlord Rebate	0	0	0	0
Phase 4 Pilot	38,875	20,221	30,955	90,052
Total Pilots	39,559	20,363	46,353	106,274
Training Center	18,553	17,873	25,763	62,189
Inspections	495,210	264,743	393,348	1,153,301
Advertising	0	0	0	0
M&E Studies <sup>1</sup>	164	(39)	51,842	51,967
Regulatory Compliance <sup>2</sup>	69,993	34,477	177,340	281,810
Other Administration <sup>3</sup>	279,557	172,449	1,690,279	2,142,285
Indirect Costs <sup>4</sup>	3,329,716	0	0	3,329,716
Oversight Costs				
LIOB Expense	0	0	0	0
CPUC Energy Division	0	0	14,465	14,465
Total Oversight Costs	0	0	14,465	14,465
TOTAL COSTS <sup>5</sup>	4,366,228	838,205	16,812,685	22,017,118

## Notes:

1. M&E studies include: LIEE Program Evaluations, Bill Savings, and Cost Effectiveness Testing.
2. Regulatory Compliance includes LIEE Standardization, RRM Working Group Report, CBO Access and Leveraging Report, and Monthly CPUC Reports.
3. Includes PG&E's program management and prime contractor's management.
4. Indirect costs include Combustible Appliances Safety (CAS) Testing, which is not part of the LIEE budget.
5. Total costs include Combustion Appliance Safety (CAS) Testing, which is not part of the LIEE budget.

**TABLE TA 3**  
**PROGRAM DETAIL BY HOUSING TYPE AND HEATING SOURCE**

	Energy <sup>4</sup> Saved and Program Costs			Number of Dwellings		
	2002 (mWh)	2002 (mTherm*)	2002 Expenses (\$)	2002 (Planned)	2002 (Actual)	2003 (Planned) <sup>5</sup>
Gas Heat – Own						
Single Family <sup>1</sup>	13,429	4.172	20,704,482		22,309	
Multi Family <sup>2</sup>	184	0.057	283,064		305	
Mobile Home	3,979	1.236	6,134,593		6,610	
Sub Total Dwellings Served	17,592	5.465	27,122,138		29,224	
Gas Heat – Rent						
Single Family <sup>1</sup>	12,095	3.757	18,646,934		20,092	
Multi Family <sup>2</sup>	7,563	2.349	11,659,438		12,563	
Mobile Home	465	0.145	717,404		773	
Sub Total Dwellings Served	20,123	6.251	31,023,776		33,428	
Electric Heat – Own						
Single Family <sup>1</sup>	920	0.286	1,419,031		1,529	
Multi Family <sup>2</sup>	41	0.013	63,109		68	
Mobile Home	294	0.091	452,902		488	
Sub Total Dwellings Served	1,255	0.390	1,935,042		2,085	
Electric Heat – Rent						
Single Family <sup>1</sup>	1,114	0.346	1,716,943		1,850	
Multi Family <sup>2</sup>	2,375	0.738	3,661,266		3,945	
Mobile Home	91	0.028	140,140		151	
Sub Total Dwellings Served	3,579	1.112	5,518,349		5,946	
<b>TOTAL DWELLINGS SERVED<sup>6</sup></b>					<b>70,683</b>	
<b>TOTAL EXPENSES<sup>3</sup></b>			<b>65,599,305</b>			

\* millions of Therms

Notes:

1. Single Family includes buildings of 2-4 units.
2. Multi Family includes buildings of more than 4 units.
3. Total Expenses include all administration, regulatory, and Combustion Appliance Safety (CAS) testing costs.  
CAS testing is not part of the LIEE budget.
4. First year energy savings
5. PG&E does not forecast at this level.
6. Total includes homes treated by La Cooperativa and Go-Back contractors.

**TABLE TA 4**  
**PROGRAM DETAIL BY MEASURE**

	Energy Saved and Program Costs <sup>4</sup>			Number of Dwellings Served
	2002			2002
	(mWh)	(mTherm*)	Expenses (\$)	Actual Dwellings Served
<b>Furnaces Gas</b>				
Repair		0	262,423	632
Replacement		0	411,508	330
Total Furnaces Gas		0	673,931	962
<b>Infiltration &amp; Space Conditioning</b>				
Caulking	96	0.020	1,392,462	32,608
Door Weatherstripping	268	0.058	2,293,402	30,308
Cover Plate Gaskets	199	0.023	570,691	31,968
Evaporative Cooler Covers	0.4	0.009	248,844	3,809
Window Replacement <sup>1</sup>	0	0	0	0
Glass Replacement <sup>1</sup>	0	0	0	0
Wall Repair (Exterior) <sup>1</sup>	0	0	0	0
Attic Ventilation <sup>5</sup>	0	0	0	0
Attic Insulation	351	0.097	2,370,913	4,266
Attic Access Weatherstripping	53	0.014	143,955	13,007
HVAC Air Filter Replacement	53	0.012	230,272	17,853
Total Infiltration & Space Conditioning	1,020	0.231	7,250,539	
<b>Water Heating Savings</b>				
Water Heater Blanket	127	0.086	189,789	7,137
Low Flow Showerhead	681	0.457	776,749	30,603
Water Heater Pipe Wrap	7	0.005	12,886	1,352
Faucet Aerators	25	0.118	299,048	36,939
Total Water Heating Savings	840	0.665	1,278,473	
<b>Rapid Deployment Measures</b>				
Air Conditioner	837		1,289,608	442
Duct Sealing & Repair	71	0.021	93,467	289
Whole House Fan	2		38,320	99
Water Heater	0	0.014	596,918	765
Set-Back Thermostat	126	0.192	555,634	4,282
Evaporative Cooler Maintenance	228		149,704	1,100
Total Rapid Deployment Measures	1,264	0.227	2,723,651	
<b>Minor Home Repair<sup>1</sup></b>	575	0.126	2,724,887	28,867
<b>Evaporative Coolers<sup>2</sup></b>	5,646		5,264,361	15,968
<b>Refrigerators<sup>3</sup></b>	13,398		16,024,123	24,719
<b>Compact Fluorescents</b>	19,906		6,799,988	70,650
<b>Hard Wired Porch Lights</b>	466.55		518,587	4,085
<b>Energy Education</b>				
Outreach & Assessment			3,818,107	89,188
In-Home Education			3,219,266	56,698
Education Workshops			8,098	4,018
Total Energy Education			7,045,471	149,904

\* millions of Therms

## Notes:

1. Minor Home repair includes cover plate replacement, combustion ventilation air opening, door jambs, door patch/plate, door replacement, exhaust fan vent, glazing compound, lock set, threshold, ceiling repair, floor repair, window replacement, glass replacement, and exterior wall repair.
2. Commitments of 498 evaporative coolers were included as recorded expenses in the 2002 AEAP. These have been deducted from the "Number Installed" and "Per Measure Impacts" to avoid "double counting."
3. Commitments of 966 refrigerators were included as recorded expenses in the 2002 AEAP. These have been deducted from the "Number Installed" and "Per Measure Impacts" to avoid "double counting."
4. First year energy saved. Measure expenses exclude program management, labor benefits and overhead burden.
5. PG&E does not offer attic ventilation as a stand alone measure. It is installed in conjunction with attic insulation.

**TABLE TA 5**  
**INSTALLATION COSTS OF LIEE PROGRAM INSTALLATION CONTRACTORS**

	Unit of Measure	CBO/WMDVBE			Non-CBO/WMDVBE			Total				
		Units Installed	Dwellings	Costs (\$)	Units Installed	Dwellings	Costs (\$)	Units Installed	Dwellings	Costs (\$)	Cost/ Unit (\$)	Cost/Dwelling (\$)
<b>Dwellings</b>	Each											
<b>Furnaces</b>												
Repair - Gas	Each	0	0	0	632	632	262,423	632	632	262,423	415.23	415.23
Replacement - Gas	Each	0	0	0	330	330	411,508	330	330	411,508	1,246.99	1,246.99
Repair - Electric	Each	0	0	0	0	0	0	0	0	0	0.00	0.00
Replacement - Electric	Each	0	0	0	0	0	0	0	0	0	0.00	0.00
<b>Infiltration &amp; Space Conditioning</b>												
Caulking	Linear Ft.	399,156	13,568	598,105	544,476	19,040	794,358	943,632	32,608	1,392,462	1.48	42.70
Door Weatherstripping	Each	24,824	12,858	902,858	33,907	17,450	1,390,544	58,731	30,308	2,293,402	39.05	75.67
Cover Plates Gaskets	Home	281,124	13,420	231,617	339,763	18,548	339,074	620,887	31,968	570,691	0.92	17.85
Evaporative Cooler / Air Conditioner Covers	Each	4,077	2,416	177,317	1,682	1,393	71,527	5,759	3,809	248,844	43.21	65.33
Window Replacement	Each	877	110	11,774	338	108	4,424	1,215	218	16,198	13.33	74.30
Glass Replacement	Sq Ft	20,369	1,352	91,223	67,486	1,661	124,428	87,855	3,013	215,651	2.45	71.57
Wall Repair (Exterior)	Home	5,723	1,801	16,640	1,568	598	6,415	7,291	2,399	23,055	3.16	9.61
Door Repair	Each	586	443	4,120	580	405	5,240	1,166	848	9,360	8.03	11.04
Door Replacement	Each	1,289	1,078	153,931	1,033	905	149,464	2,322	1,983	303,395	130.66	153.00
Threshold Installed	Each	7,319	4,616	158,301	8,972	6,078	193,594	16,291	10,694	351,895	21.60	32.91
Attic Ventilation	Home	1,221	462	60,215	675	252	35,350	1,896	714	95,565	50.40	133.84
Attic Insulation	Sq. Ft.	1,509,350	1,471	748,536	3,049,411	2,795	1,622,377	4,558,761	4,266	2,370,913	0.52	555.77
Attic Access Weatherstripping	Each	6,719	6,355	71,294	6,963	6,652	72,661	13,682	13,007	143,955	10.52	11.07
HVAC Air Filter Replacement	Each	8,599	8,256	99,712	10,173	9,597	130,560	18,772	17,853	230,272	12.27	12.90
<b>Water Heating Savings</b>												
Water Heater Blanket	Each	2,626	2,611	67,455	4,511	4,502	122,335	7,137	7,113	189,789	26.59	26.68
Low Flow Showerhead	Each	16,431	13,088	333,085	21,223	17,515	443,664	37,654	30,603	776,749	20.63	25.38
Water Heater Pipe Wrap	Home	4,141	1,003	9,683	1,313	349	3,203	5,454	1,352	12,886	2.36	9.53
Faucet Aerators	Each	34,399	15,799	125,936	43,515	21,140	173,112	77,914	36,939	299,048	3.84	8.10
<b>Rapid Deployment Measures</b>												
Air Conditioner	Each	0	0	0	442	442	1,289,608	442	442	1,289,608	2,917.67	2,917.67
Duct Sealing & Repair	Each	0	0	0	289	289	93,467	289	289	93,467	323.42	323.42
Whole House Fan	Each	0	0	0	99	99	38,320	99	99	38,320	387.07	387.07
Water Heater	Each	0	0	0	765	765	596,918	765	765	596,918	780.28	780.28
Set-Back Thermostat	Each	998	998	133,418	3,284	3,284	422,216	4,282	4,282	555,634	129.76	129.76
Evaporative Cooler Maintenance	Each	533	519	71,006	588	581	78,698	1,121	1,100	149,704	133.55	136.09
<b>Minor Home Repairs (other than above)<sup>1</sup></b>	Home	112,848	21,901	889,809	80,553	19,422	819,959	193,401	28,867	1,709,768	8.84	59.23
<b>Miscellaneous Measures</b>		0	0	0	0	0	0	0	0	0	0.00	0.00
<b>Evaporative Coolers<sup>2</sup></b>	Each	0	0	0	15,968	15,968	5,264,361	15,968	15,968	5,264,361	329.68	329.68
<b>Refrigerators<sup>3</sup></b>	Each	0	0	0	24,719	24,719	16,024,123	24,719	24,719	16,024,123	648.25	648.25
<b>Compact Fluorescents (inc. porchlights)</b>	Each	151,321	31,738	2,838,509	193,073	38,912	4,480,066	344,394	70,650	7,318,575	21.25	103.59
<b>Outreach Education Administration</b>	Home	9,903	9,903	815,440	46,795	46,795	2,403,826	56,698	56,698	3,219,266	56.78	56.78

**Notes:**

1. Minor Home repair includes attic access weatherstripping, cover plate replacement, combustion ventilation air opening, door jams, door patch/plate, door replacement, exhaust fan vent, glazing compound, lock set, threshold, ceiling repair, floor repair, window replacement, glass replacement, and exterior wall repair.
2. Commitments of 498 evaporative coolers were included as recorded expenses in the 2002 AEAP. These have been deducted from the "Number Installed" and "Per Measure Impacts" to avoid "double counting."
3. Commitments of 966 refrigerators were included as recorded expenses in the 2002 AEAP. These have been deducted from the "Number Installed" and "Per Measure Impacts" to avoid "double counting."



TABLE TA 6

**PERCENTAGE OF DWELLINGS SERVED BY CONTRACTOR CLASSIFICATION  
PG&E - 2002**

Program	Contractor Classification	Vendor Number	Number Dwellings Completed	% Dwellings Completed	WMDVBE Certified <sup>1</sup> (Yes or No)
LIEE	CBO Participants				
		ASI	219	0.46%	Yes
		ATCAA	100	0.21%	No
		ATT	107	0.22%	No
		Butte	1063	2.23%	No
		CHDN	1615	3.38%	No
		CHDS	2080	4.36%	No
		EOC	2432	5.10%	No
		EOCF	2244	4.70%	No
		Glenn	260	0.54%	No
		NCES	949	1.99%	No
		PGO	267	0.56%	No
		SHHIP	756	1.58%	No
		<b>Subtotal</b>	<b>12092</b>	<b>25.33%</b>	
	Non-CBO Participants				
		AmSyn	3106	6.51%	No
		Atlas	1228	2.57%	No
		BOE	5556	11.64%	No
		Cent	501	1.05%	No
		Pro	820	1.72%	No
		QCS	4974	10.42%	No
		QCSE	397	0.83%	No
		Ren	3440	7.21%	No
		RVB	2049	4.29%	No
		WGE	4332	9.08%	Yes
		WGF	1789	3.75%	Yes
		WHC	289	0.61%	Yes
		WST	7156	14.99%	Yes
		<b>Subtotal</b>	<b>35637</b>	<b>74.67%</b>	

## Notes:

1. PG&E's prime contractor, RHA, is a Women, Minority, Disabled, Veteran Business Enterprise (WMDVBE); therefore, payments made to the subcontractors through RHA are counted as WMDVBE in filings made to the CPUC even though the individual sub-contractor may or may not be a WMDVBE.

The list of contractors does not include LaCooperativa, Go-Back and McPhails.

LaCooperativa participated in the farm workers project. Go-Back contractors offered Rapid Deployment refrigerators and evaporative coolers to LIEE participants who now qualify under the Rapid Deployment rules and regulations.

**TABLE TA 7**  
**LIFE CYCLE BILL SAVINGS**  
**PG&E - 2002**

Measure Description	Number Installed	Per Measure Electric Impact (kWh)		Per Measure Gas Impact (Therms)	Effective Useful Life (EUL)	Total Measure Lifecycle Bill Savings (\$)
		SH	AC			
Energy Efficiency Measures						
Attic Access Weatherstripping - mobile (Electric)	26	6.80	3.25	0.00	5	\$ 69
Attic Access Weatherstripping - mobile (Gas)	3	0.00	3.25	0.72	5	\$ 6
Attic Access Weatherstripping - mult fam (Electric)	2,441	12.31	5.11	0.00	5	\$ 11,347
Attic Access Weatherstripping - mult fam (Gas)	292	0.00	5.11	0.13	5	\$ 455
Attic Access Weatherstripping - sing fam (Electric)	9,149	13.60	6.49	0.00	5	\$ 49,057
Attic Access Weatherstripping - sing fam (Gas)	1,096	0.00	6.49	1.44	5	\$ 4,236
Attic Insulation - mult fam (Electric)	63	266.10	102.00	0.00	25	\$ 28,595
Attic Insulation - mult fam (Gas)	526	0.00	102.00	2.90	25	\$ 76,559
Attic Insulation - sing fam (Electric)	393	271.70	129.90	0.00	25	\$ 194,760
Attic Insulation - sing fam (Gas)	3,284	0.00	129.90	29.00	25	\$ 1,176,828
Building Envelope (Minor Home) Repair - mobile (Electric)	297	67.90	32.50	0.00	10	\$ 19,533
Building Envelope (Minor Home) Repair - mobile (Gas)	2,481	0.00	32.50	7.20	10	\$ 117,620
Building Envelope (Minor Home) Repair - mult fam (Electric)	1,097	66.50	25.50	0.00	10	\$ 66,049
Building Envelope (Minor Home) Repair - mult fam (Gas)	9,154	0.00	25.50	0.70	10	\$ 176,052
Building Envelope (Minor Home) Repair - sing fam (Electric)	1,695	67.90	32.50	0.00	10	\$ 111,364
Building Envelope (Minor Home) Repair - sing fam (Gas)	14,143	0.00	32.50	7.20	10	\$ 670,577
Caulking - mobile (Electric)	388	10.20	4.90	0.00	5	\$ 2,123
Caulking - mobile (Gas)	3,239	0.00	4.90	1.08	5	\$ 12,781
Caulking - mult fam (Electric)	1,414	9.20	3.80	0.00	5	\$ 6,659
Caulking - mult fam (Gas)	11,798	0.00	3.80	0.10	5	\$ 18,615
Caulking - sing fam (Electric)	1,687	10.20	4.90	0.00	5	\$ 9,231
Caulking - sing fam (Gas)	14,082	0.00	4.90	1.08	5	\$ 55,566
Compact Fluorescent Hard Wire Porch Lights	6,665	70.00	0.00	0.00	20	\$ 686,197
Compact Fluorescent Lamp	344,394	57.80	0.00	0.00	8	\$ 15,184,045
Door Weatherstripping - mobile (Electric)	365	30.60	14.60	0.00	5	\$ 6,026
Door Weatherstripping - mobile (Gas)	3,050	0.00	14.60	3.23	5	\$ 36,178
Door Weatherstripping - mult fam (Electric)	1,213	27.70	11.50	0.00	5	\$ 17,346
Door Weatherstripping - mult fam (Gas)	10,122	0.00	11.50	0.30	5	\$ 48,614
Door Weatherstripping - sing fam (Electric)	1,665	30.60	14.60	0.00	5	\$ 27,452
Door Weatherstripping - sing fam (Gas)	13,893	0.00	14.60	3.23	5	\$ 164,820
Energy Education (Electric)	6,067	0.00	0.00	0.00	1	\$ -
Energy Education (Gas)	50,631	0.00	0.00	0.00	1	\$ -
Evaporative Cooler Covers	3,809	1.02	0.00	2.60	3	\$ 15,901
Evaporative Coolers (Portable) <sup>1</sup>	15,968	353.60	0.00	0.00	7	\$ 3,855,892
Faucet Aerators	36,939	7.38	0.00	3.50	5	\$ 346,006
Furnace Filters - mobile (Electric)	310	10.20	4.90	0.00	5	\$ 1,717
Furnace Filters - mobile (Gas)	2,586	0.00	4.90	1.08	5	\$ 10,336
Furnace Filters - mult fam (Electric)	626	9.20	3.80	0.00	5	\$ 2,986
Furnace Filters - mult fam (Gas)	5,224	0.00	3.80	0.10	5	\$ 8,349
Furnace Filters - sing fam (Electric)	974	10.20	4.90	0.00	5	\$ 5,400
Furnace Filters - sing fam (Gas)	8,133	0.00	4.90	1.08	5	\$ 32,505
Furnace Repair (Gas)	632	0.00	0.00	0.00	15	\$ -
Furnace Replacement (Gas)	330	0.00	0.00	0.00	25	\$ -
Low Flow Showerhead	30,603	247.20	0.00	16.40	10	\$ 2,929,296
Outlet/Switch Gaskets (Electric)	3,421	18.76	10.00	0.00	15	\$ 76,971
Outlet/Switch Gaskets (Gas)	28,547	0.00	10.00	0.80	15	\$ 322,479
Refrigerator Replacement <sup>2</sup>	24,719	542.00	0.00	0.00	15	\$ 16,412,277
Water Heater Blanket - (Electric)	764	197.80	0.00	0.00	5	\$ 75,295
Water Heater Blanket - (Gas)	6,373	0.00	0.00	13.20	5	\$ 232,617
Water Heater Pipe Wrap (Electric)	145	58.00	0.00	0.00	15	\$ 10,038
Water Heater Pipe Wrap (Gas)	1,207	0.00	0.00	4.00	15	\$ 32,049

Measure Description	Number Installed	Per Measure Electric Impact (kWh)		Per Measure Gas Impact (Therms)	Effective Useful Life (EUL)	Total Measure Lifecycle Bill Savings (\$)
		SH	AC			
<b>Sub-total for Energy Efficiency Measures</b>	<b>688,123</b>					<b>\$ 43,348,873</b>
<b>Rapid Deployment Measures</b>						
Air Conditioning Replacement - Central	442	0.00	1893.06	0.00	18	\$ 1,154,358
Duct Seal - mobile(Electric)	2	447.37	387.30	0.00	25	\$ 1,574
Duct Seal - mobile(Gas)	13	0.00	387.30	72.80	25	\$ 12,452
Duct Seal - mult (Electric)	5	441.10	155.40	0.00	25	\$ 3,375
Duct Seal - mult (Gas)	40	0.00	155.40	33.20	25	\$ 16,034
Duct Seal - sing fam (Electric)	25	482.63	529.60	0.00	25	\$ 29,145
Duct Seal - sing fam (Gas)	204	0.00	529.60	89.90	25	\$ 247,095
Evaporative Cooler Maintenance - mobile	79	132.50	0.00	0.00	4	\$ 4,381
Evaporative Cooler Maintenance - mult fam	350	112.90	0.00	0.00	4	\$ 16,537
Evaporative Cooler Maintenance - sing fam	692	256.90	0.00	0.00	4	\$ 74,398
Set-back Thermostats - mobile (Electric)	109	283.00	12.20	0.00	12	\$ 32,391
Set-back Thermostats - mobile (Gas)	909	0.00	12.20	48.70	12	\$ 258,552
Set-back Thermostats - mult fam (Electric)	108	132.50	11.90	0.00	12	\$ 15,658
Set-back Thermostats - mult fam (Gas)	898	0.00	11.90	25.30	12	\$ 137,769
Set-back Thermostats - sing fam (Electric)	242	194.50	24.40	0.00	12	\$ 53,276
Set-back Thermostats - sing fam (Gas)	2,016	0.00	24.40	62.20	12	\$ 750,373
Water heater Replacement	765	0.00	0.00	18.50	13	\$ 87,034
Whole House Fans	99	223.00	0.00	0.00	20	\$ 3,474
<b>Sub-total for Rapid Deployment Measures</b>	<b>6998</b>					<b>\$ 2,897,876</b>
<b>Total Lifecycle Bill Savings for All Measures in Program Year 2002</b>						<b>\$ 46,246,749</b>
<b>Total Number of Homes Served by the Program during Program Year 2002</b>						<b>70,683</b>
<b>Lifecycle Bill Savings Per Home</b>						<b>\$ 654.28</b>

**Notes:**

1. Commitments of 498 evaporative coolers were included as recorded expenses in the 2002 AEAP. These have been deducted from the "Number Installed" and "Per Measure Impacts" to avoid "double counting."
2. Commitments of 966 refrigerators were included as recorded expenses in the 2002 AEAP. These have been deducted from the "Number Installed" and "Per Measure Impacts" to avoid "double counting."

**TABLE TA 8**  
**ENERGY RATES USED FOR BILL SAVINGS**  
**CALCULATIONS**  
**PG&E**

Year	\$/kWh	\$/Therm
2002	0.1124	0.6235
2003	0.1158	0.6422
2004	0.1192	0.6615
2005	0.1228	0.6813
2006	0.1265	0.7018
2007	0.1303	0.7228
2008	0.1342	0.7445
2009	0.1382	0.7668
2010	0.1424	0.7898
2011	0.1467	0.8135
2012	0.1511	0.8379
2013	0.1556	0.8631
2014	0.1603	0.8890
2015	0.1651	0.9156
2016	0.1700	0.9431
2017	0.1751	0.9714
2018	0.1804	1.0005
2019	0.1858	1.0306
2020	0.1914	1.0615
2021	0.1971	1.0933
2022	0.2030	1.1261
2023	0.2091	1.1599
2024	0.2154	1.1947
2025	0.2218	1.2305
2026	0.2285	1.2674

**TABLE TA 9**  
**BILL SAVINGS**  
**PG&E**

Program Year	Program Costs <sup>1</sup> (\$)	Program Lifecycle Bill Savings <sup>2</sup> (\$)	Program Bill Savings / Cost Ratio	Per Home Average Lifecycle Bill Savings
2000	25,211,161	19,017,560	0.75	\$ 581
2001	29,634,528	17,883,560	0.60	\$ 471
2002	65,599,306	46,246,749	0.70	\$ 654

**Notes:**

1. Program Costs include Combustion Appliance Safety (CAS) testing, which is not in the LIEE budget but is a program expense.
2. Lifecycle Bill Savings do not include non-energy benefits.

## Attachment A

## LIEE Leveraging and Outreach Initiatives

LIEE Initiative (A)	Summary (B)	Timeline (C)	Status (D)
<b>Leveraging Activities with State and Local</b>			
CLIEP	PG&E and the other utilities met with CSD regularly throughout May and June to discuss further leveraging opportunities within the network of LIHEAP service providers (see Attachment A to PG&E's July 2, 2001 monthly status report, which is a letter from CSD, the Energy Division and the utilities to all LIHEAP providers addressing leveraging opportunities).	May 2001 - March 2002	Completed
CSD/LIHEAP Billing Procedures Coordination	Representatives from PG&E's Low Income Energy Management, Customer Billing, and External Relation Departments met with CSD and LIHEAP providers to discuss billing issues and procedures regarding HEAP and HEAP FasTrack payments.	May 2001- present	On-Going
Bulk Purchase of Refrigerators (with La Cooperativa )	PG&E negotiated with La Cooperativa, a LIHEAP provider, to coordinate delivery of PG&E refrigerators to La Cooperative Cal LIHEAP program customers. Contract has been signed and refrigerators are being delivered.	July 2001- April 2002	Completed
LIHEAP Providers Implementing PG&E's LIEE Program	PG&E's LIEE contractors were also LIHEAP providers in 17 counties.	May 2001 - present	On-Going
Project Go: Leveraging Federal and State LIHEAP funding	PG&E's Program Administrator (RHA) signed a Memorandum of Understanding with Project Go to leverage LIHEAP funding for the installation of set-back thermostats while working on the LIEE program.	8/1/2001 - present	On-Going
Disability Awareness Meeting with CA Foundation of Independent Living Centers	Meetings to discuss outreach of low income programs to disabled community.	December 2001 - March 2002	Completed
<b>Outreach</b>			
Hard-To-Reach Program	PG&E leveraged its Third-Party-Initiative program to hard-to-reach customers—PG&E contractors will host workshops at home improvement stores and pass out CARE applications, LIEE flyers, and 1-2-3 cash back program information.	May 2001 - March 2002	Completed
MUD Third Party Initiative Program	PG&E completed a contract with Multi-Unit Dwelling TPI contractor on 7/11/01. Program will roll out in August 2001 to offer refrigerator replacement and recycling in low to moderate income MUDs. This is a joint venture between PG&E's Low Income and Residential Energy Management Groups and the contractor (RHA).	August 2001-June 2002	Completed
Open Forum Meetings	PG&E created the Open Forum to provide an opportunity for open exchange and discussion between CBOs and other low income service providers and PG&E on utility low income issues. PG&E met with the Open Forum several times through the year to discuss REACH, billing issues, LIEE, CARE, and PG&E residential energy efficiency rebate programs.	May 2001 - December 2002	Completed

<b>LIEE Initiative (A)</b>	<b>Summary (B)</b>	<b>Timeline (C)</b>	<b>Status (D)</b>
Strategic Alliance Consultant Team	PG&E hired 7 consultants to provide low income community input on LIEE program design, delivery and legislative impact on programs. Representatives from Fresno, Watsonville, Bay Area, North Peninsula, and Native American communities were all part of the team.	Oct 2001 - December 2002	Completed
Affordable Housing Meeting/Events	PG&E participated in Affordable Housing Conferences and Events to promote our Energy Efficiency Programs and Services for Low Income, Hard-To-Reach, and Multifamily Needs.	SF Hilton - 10/9/01 SFO Marriott - 11/8 & 11/9	Completed
Sacramento Housing Coalition	PG&E is participating in SMUD Housing Coalition Meetings and Events to Promote Energy Efficiency Programs for Seniors/Disabled, Low Income, Hard to Reach and Multifamily Needs.	April 2000 - present	On-Going
The Eden Advocacy Matrix (TEAM)	PG&E participated in TEAM Coalition Meetings and Events to promote Energy Efficiency Programs and Services for Low Income, Hard-To-Reach, Multifamily Needs and Human Resources Needs.	2/1/2001- present	On-Going
West Contra Costa Co Senior Coalition	PG&E is participating in WCCCSC Meetings and Events to Promote Energy Efficiency Programs for Seniors/Disabled, Low Income, Hard to Reach and Multifamily Needs.	5/1/2001- present	On-Going
Central Valley Opportunity Center	PG&E met with CVOC on November 14, 2001 to discuss and implement a referral process between CVOC and the private contractor working in Merced County.	11/1/2001 - present	Ongoing
<b>Native American Leveraging and Outreach</b>			
Sonoma and Humboldt Counties	PG&E answered inquiries and provided information about its low income and hard-to-reach programs to Native American contacts in Sonoma and Humboldt Counties.	July 2001 - present	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 that service this population.	Nov-01	Completed
<b>Low Income Presentations and Media Initiatives</b>			
Italian American Community Cntr. SF	Financial Assistance Programs, Energy Partners (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	Financial Assistance Programs, EP, CARE. Shared outreach efforts 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

LIEE Initiative (A)	Summary (B)	Timeline (C)	Status (D)
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
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 and 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



LIEE Initiative (A)	Summary (B)	Timeline (C)	Status (D)
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
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
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
El Concilio's Cinco de Mayo Event	Signed customers up for CARE/EP and discussed financial assistance programs with 500 Hispanic Low Income, seniors and disabled customers.	5/5/02	Completed

LIEE Initiative (A)	Summary (B)	Timeline (C)	Status (D)
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 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 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 Senion 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

LIEE Initiative (A)	Summary (B)	Timeline (C)	Status (D)
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/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
Multi-Family Consortium (PEC - San Francisco)	Provided info on CARE, EP, Financial Assistance Programs and Services for 40 Multifamily 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, Multifamily 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
Presentation 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 - E	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 Aging	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, Multifamily Rebates.	8/13/2002	Completed

LIEE Initiative (A)	Summary (B)	Timeline (C)	Status (D)
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, Multifamily Rebates.	10/23/2002	Completed
CA Association of NonProfits (CAN) Energy Equity for Nonprofits - San Luis Obispo	EP, CARE, REACH, Express Efficiency, Multifamily Rebates.	10/24/2002	Completed
SMUD	Sent SMUD 300 English/Spanish Financial Assistance Brochures and 50 Hmong and Russian Financial Assistance Programs Flyers. SMUD provides 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)  
HEAP - Home Energy Assistance Program (federal program)  
RCP - Residential Contractor Program  
REACH - PG&E bill assistance program administered by the Salvation Army  
SIRS - Sons in Retirement  
CFL - Compact Fluorescent Light