

PG&E's CARE Program Administrative Cost Summary per ORA's template

	2011	2012	2013	2014	2015	2016	2017
IT Programming	\$ -	\$ 751,000	\$ 646,000	\$ 651,000	\$ 1,491,000	\$ 1,650,000	\$ 1,750,000
Labor							
Data Reporting, Data Analysis, Misc.		\$ 100,000	\$ 100,000	\$ 100,000	\$ 162,000	\$ 167,000	\$ 172,000
IVR Enhancements and Support		\$ 45,000	\$ 10,000	\$ 10,000	\$ 25,000	\$ 25,000	\$ 25,000
Propensity Model - Eligibility score and data analysis		\$ 120,000	\$ 123,000	\$ 127,000			
CC&B Implementation		\$ 73,000			\$ 100,000	\$ 100,000	\$ 100,000
Data Sharing - Internal & External					\$ 75,000	\$ 75,000	\$ 75,000
CARE System Enhancements and Support					\$ 548,000	\$ 565,000	\$ 582,000
CARE Online Applications Enhancements and Support		\$ 413,000	\$ 413,000	\$ 414,000	\$ 431,000	\$ 468,000	\$ 492,000
CARE Mobile Enhancements and Support					\$ 150,000	\$ 150,000	\$ 150,000
Community Engagement Strategy - heat map and other interfaces					\$ -	\$ 100,000	\$ 154,000
Measurement and Evaluation	\$ -	\$ 45,000	\$ 46,000	\$ 48,000	\$ 74,000	\$ 74,000	\$ 74,000
Eligibility Update		\$ 45,000	\$ 46,000	\$ 48,000	\$ 74,000	\$ 74,000	\$ 74,000
Outreach	\$ -	\$ 6,651,000	\$ 5,818,000	\$ 6,001,000	\$ 7,900,000	\$ 9,361,000	\$ 10,147,000
Community Engagement Strategy Outreach							
Labor					\$ 534,000	\$ 584,000	\$ 601,000
Temporary Labor - CE Consultant					\$ 100,000	\$ 100,000	\$ 100,000
Temporary Labor - Program Evaluator					\$ 75,000	\$ 150,000	\$ 150,000
Benchmarking Studies					\$ 50,000	\$ 50,000	\$ 50,000
COC - Capitation Fee		\$ 200,000	\$ 206,000	\$ 212,000	\$ 220,000	\$ 220,000	\$ 220,000
COC - Community Ambassadors Program					\$ 113,000	\$ 175,000	\$ 200,000
Community Networks - After School/Youth Education Outreach					\$ 100,000	\$ 100,000	\$ 150,000
Community Health Outreach					\$ 75,000	\$ 100,000	\$ 100,000
Collateral Mass Mailing					\$ 60,000	\$ 62,000	\$ 64,000
Graphic Design - community toolkit/partnership materials					\$ 75,000	\$ 77,000	\$ 80,000
Brochures and Applications					\$ 100,000	\$ 103,000	\$ 106,000
Giveaways					\$ 100,000	\$ 103,000	\$ 106,000
Event Sponsorships					\$ 16,000	\$ 18,000	\$ 20,000
Misc. Expenses		\$ 77,000	\$ 79,000	\$ 82,000	\$ 10,000	\$ 10,000	\$ 10,000
Acquisition, Retention, and Other Outreach							
Labor		\$ 889,000	\$ 921,000	\$ 956,000	\$ 681,000	\$ 717,000	\$ 789,000
Analytics and Research							
Analytics - Lists pull for outreach efforts						\$ 288,000	\$ 317,000
Research - Messaging, designing and customer experience						\$ 78,000	\$ 85,000
Acquisition Outreach					\$ 2,970,000		
Direct mail and/or email		\$ 1,133,000	\$ 1,165,000	\$ 1,201,000		\$ 1,599,000	\$ 1,759,000
Digital advertising, search and radio campaign		\$ 206,000	\$ 212,000	\$ 218,000		\$ 792,000	\$ 871,000
Automated calls and text		\$ 1,277,000	\$ 1,313,000	\$ 1,353,000		\$ 92,000	\$ 101,000
Telemarketing						\$ 396,000	\$ 436,000
All Connect						\$ 48,000	\$ 52,000
Home Energy Report						\$ 15,000	\$ 17,000
Retention Outreach					\$ 1,315,000		
CARE monthly email newsletter						\$ 90,000	\$ 99,000
Retention: AVM, text						\$ 115,000	\$ 127,000
Website - overhaul and ongoing edits to CARE web pages to ensure proper messaging, design and customer experience						\$ 50,000	\$ 55,000
Collaterals		\$ 103,000	\$ 106,000	\$ 109,000		\$ 33,000	\$ 36,000
AB327 Rate Changes						\$ 853,000	\$ 938,000
Welcome Kit						\$ 1,026,000	\$ 1,129,000
Rate Change - CARE Tier 3 communication		\$ 1,000,000					
Other Outreach							
Labor - Toll Free Line Calls and Phone Enrollment		\$ 371,000	\$ 381,000	\$ 393,000	\$ 568,000	\$ 585,000	\$ 602,000
Postage Fees		\$ 567,000	\$ 583,000	\$ 600,000	\$ 540,000	\$ 567,000	\$ 595,000
Program support materials Design & Edits		\$ 120,000	\$ 124,000	\$ 127,000	\$ 150,000	\$ 165,000	\$ 182,000
Program support materials Printing		\$ 613,000	\$ 630,000	\$ 649,000			
Other outreach and enrollment support		\$ 65,000	\$ 67,000	\$ 69,000	\$ 48,000		
Travel		\$ 30,000	\$ 31,000	\$ 32,000			
Pilots	\$ -	\$ -	\$ -	\$ -	\$ 277,000	\$ -	\$ -
Labor - CHANGES					\$ 57,000		
Contract - CHANGES					\$ 220,000		
Post Enrollment Verification	\$ -	\$ 375,000	\$ 388,000	\$ 402,000	\$ 1,406,000	\$ 1,581,000	\$ 1,627,000
Labor - PEV calls handling					\$ 639,000	\$ 658,000	\$ 677,000
Labor - PEV processing		\$ 375,000	\$ 388,000	\$ 402,000	\$ 258,000	\$ 399,000	\$ 411,000
Temporary Labor - PEV processing					\$ 300,000	\$ 309,000	\$ 318,000
Office Supplies, Travel, Misc.					\$ 10,000	\$ 10,000	\$ 10,000
Contract - open, sort and scan PEV documents					\$ 199,000	\$ 205,000	\$ 211,000
Processing, Certification, Recertification	\$ -	\$ 1,607,000	\$ 1,667,000	\$ 1,729,000	\$ 2,098,000	\$ 2,160,000	\$ 2,225,000
Labor		\$ 977,000	\$ 1,013,000	\$ 1,051,000	\$ 1,355,000	\$ 1,395,000	\$ 1,437,000
Temporary Labor		\$ 630,000	\$ 654,000	\$ 678,000	\$ 600,000	\$ 618,000	\$ 637,000
Office Supplies, Travel, Misc.					\$ 10,000	\$ 10,000	\$ 10,000
Contract - open, sort and scan applications					\$ 133,000	\$ 137,000	\$ 141,000
Regulatory Compliance	\$ -	\$ 311,000	\$ 316,000	\$ 342,000	\$ 228,000	\$ 343,000	\$ 354,000
Labor		\$ 301,000	\$ 306,000	\$ 331,000	\$ 224,000	\$ 339,000	\$ 349,000
Travel		\$ 10,000	\$ 10,000	\$ 11,000	\$ 4,000	\$ 4,000	\$ 5,000
Cool Centers	\$ -	\$ 229,000	\$ 236,000	\$ 243,000	\$ 139,000	\$ 150,000	\$ 161,000
Labor		\$ 14,000	\$ 15,000	\$ 15,000	\$ 4,000	\$ 4,000	\$ 4,000
Marketing Outreach: Bill insert, Collaterals, Website, IVR		\$ 65,000	\$ 67,000	\$ 69,000	\$ 35,000	\$ 36,000	\$ 37,000
Direct Funding to Cooling Centers		\$ 150,000	\$ 154,000	\$ 159,000	\$ 100,000	\$ 110,000	\$ 120,000
CPUC Energy Division Staff	\$ -	\$ 128,000	\$ 128,000	\$ 128,000	\$ 128,000	\$ 128,000	\$ 128,000
CPUC ED Staff - CARE/FERA		\$ 128,000	\$ 128,000	\$ 128,000	\$ 128,000	\$ 128,000	\$ 128,000
General Admin	\$ -	\$ 1,984,000	\$ 2,042,000	\$ 2,106,000	\$ 1,230,000	\$ 1,499,000	\$ 1,554,000
Labor		\$ 299,000	\$ 309,000	\$ 321,000	\$ 333,000	\$ 358,000	\$ 368,000
Travel, conference, membership fee, misc.		\$ 10,000	\$ 10,000	\$ 11,000	\$ 58,000	\$ 60,000	\$ 65,000
Printing PEV and other letters, Envelopes, Office Supplies and Others		\$ 185,000	\$ 190,000	\$ 196,000	\$ 413,000	\$ 425,000	\$ 434,000
Retention Outreach - confirmation letters, etc.		\$ 1,400,000	\$ 1,440,000	\$ 1,483,000	\$ -	\$ -	\$ -
Market Research - Quarterly Customer Satisfaction Survey		\$ 90,000	\$ 93,000	\$ 95,000	\$ 176,000	\$ 181,000	\$ 187,000
Market Research - Qual/Quan on CARE population include PEV non-response					\$ -	\$ 200,000	\$ 200,000
Propensity Model					\$ 250,000	\$ 275,000	\$ 300,000
PG&E's CARE Program Total Administrative Cost	\$ -	\$ 12,081,000	\$ 11,287,000	\$ 11,650,000	\$ 14,971,000	\$ 16,946,000	\$ 18,020,000

Program	CARE
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Sum of SumOfAmount	Column Labels		
Row Labels	2015	2016	2017
Cool Centers	\$35,985	\$36,853	\$37,725
Cool Zones	\$35,985	\$36,853	\$37,725
Cool Zones	\$35,985	\$36,853	\$37,725
CPUC Energy Division Staff	\$56,712	\$58,080	\$59,454
CPUC Energy Division Staff	\$56,712	\$58,080	\$59,454
CPUC ED Staff - CARE/FERA	\$56,712	\$58,080	\$59,454
General Admin	\$533,900	\$573,107	\$587,342
Employee Related Expenses	\$92,011	\$94,229	\$96,458
Computer Costs	\$1,000	\$1,024	\$1,048
Facilities	\$70,000	\$71,688	\$73,384
Office Supplies	\$2,993	\$3,065	\$3,138
Telephone	\$5,575	\$5,709	\$5,844
Travel	\$12,443	\$12,743	\$13,044
Labor	\$384,163	\$420,546	\$431,943
	\$384,163	\$420,546	\$431,943
Market Research	\$57,726	\$58,332	\$58,941
Annual Customer Satisfaction Survey	\$25,126	\$25,732	\$26,341
Quarterly Customer Opinion Survey	\$32,600	\$32,600	\$32,600
IT Programming	\$1,098,580	\$1,375,387	\$1,485,444
Labor	\$395,250	\$405,725	\$416,720
	\$395,250	\$405,725	\$416,720
Technology Costs	\$703,330	\$969,662	\$1,068,724
CARE System Enhancements and Support	\$288,304	\$288,089	\$294,905
IVR Support and Enhancements	\$17,000	\$17,410	\$17,822
PEV/Probability Enhancements	\$229,177	\$490,882	\$558,272
Propbability Model Update	\$50,000	\$50,000	\$50,000
Technology Consulting - Systems Analysis	\$100,849	\$103,281	\$105,725
Translation Services (online applications)	\$18,000	\$20,000	\$42,000
Measurement and Evaluation	\$24,750	\$24,750	\$24,750
M&E	\$24,750	\$24,750	\$24,750
Eligibility Update	\$24,750	\$24,750	\$24,750
Outreach	\$2,300,352	\$3,186,046	\$3,250,245
Analytics and Research	\$0	\$40,965	\$41,934
Analytics	\$0	\$5,121	\$5,242
Research	\$0	\$35,844	\$36,692
Direct Engagement	\$460,000	\$957,976	\$970,504
211 San Diego (Outbound Calling)	\$50,000	\$153,500	\$155,125
CARE Enrollment from ESA	\$0	\$0	\$0
CARE Partners (CAP Agencies)	\$50,000	\$100,000	\$100,000
Door-to-Door	\$160,000	\$250,000	\$250,000
Events & Presentations	\$20,000	\$20,000	\$20,000
Multicultural Outreach	\$100,000	\$100,000	\$100,000
Outreach Contractor Admin	\$0	\$249,476	\$255,379

Promotional Items	\$15,000	\$15,000	\$15,000
Rural Outreach	\$20,000	\$20,000	\$20,000
Special Needs Outreach	\$30,000	\$30,000	\$30,000
Travel Expenses - Outreach	\$15,000	\$20,000	\$25,000
Direct Marketing	\$101,908	\$104,367	\$106,836
AVM - CARE Enrollments	\$9,731	\$9,966	\$10,202
AVM - CARE Recertifications	\$15,177	\$15,543	\$15,911
Direct Mail	\$67,000	\$68,616	\$70,239
Email - Enrollments	\$5,000	\$5,121	\$5,242
Email - Recertifications	\$5,000	\$5,121	\$5,242
Labor	\$488,895	\$580,458	\$596,189
	\$488,895	\$580,458	\$596,189
Letters and Collateral	\$481,162	\$579,082	\$561,693
FCA - Fulfillment Costs	\$207,586	\$370,000	\$370,000
Fulfillment Cost Efficiencies	\$0	(\$69,999)	(\$92,963)
Postage Fees	\$60,000	\$61,800	\$63,654
Program support materials Design & Edits	\$20,000	\$20,000	\$20,000
Program support materials Printing	\$73,576	\$75,351	\$77,134
SDG&E Bill Insert	\$80,000	\$81,930	\$83,868
Translation Fees (printed material)	\$40,000	\$40,000	\$40,000
Mass Media	\$658,387	\$674,268	\$690,221
Agency Planning & Development	\$65,000	\$66,568	\$68,143
Media Placement	\$563,387	\$576,976	\$590,627
Media Planning	\$30,000	\$30,724	\$31,451
Special Initiatives	\$80,000	\$216,930	\$248,868
High Poverty Outreach	\$0	\$10,000	\$15,000
Lifeline/Cover CA Leveraging	\$80,000	\$81,930	\$83,868
Usage Comparisson Report (Opower)	\$0	\$125,000	\$150,000
Temporary Labor	\$30,000	\$32,000	\$34,000
Temporary Labor	\$30,000	\$32,000	\$34,000
Pilot	\$110,160	\$112,363	\$114,610
Pilots	\$110,160	\$112,363	\$114,610
CHANGES	\$110,160	\$112,363	\$114,610
Post Enrollment Verification	\$437,912	\$369,581	\$341,012
Employee Related Expenses	\$529	\$545	\$561
Telephone	\$529	\$545	\$561
Labor	\$292,414	\$300,163	\$308,297
	\$292,414	\$300,163	\$308,297
Market Research	\$47,000	\$61,096	\$24,193
PEV Non-respondend Research	\$25,000	\$25,000	
PEV Non-respondent Report			\$20,000
PEV Non-respondent Survey	\$18,000	\$32,000	
PRIZM Code Update	\$4,000	\$4,096	\$4,193
Temporary Labor	\$97,969	\$7,777	\$7,961
HUV Temporary Labor	\$90,375		
Temporary Labor	\$7,594	\$7,777	\$7,961
Processing, Certification, Recertification	\$643,206	\$660,164	\$676,972

Employee Related Expenses	\$2,647	\$2,711	\$2,775
Telephone	\$2,647	\$2,711	\$2,775
Labor	\$296,412	\$304,267	\$312,512
	\$296,412	\$304,267	\$312,512
Temporary Labor	\$344,147	\$353,186	\$361,685
Other Temporary Labor	\$302,715	\$310,755	\$318,250
Temporary Labor	\$41,432	\$42,431	\$43,435
Regulatory Compliance	\$244,408	\$250,875	\$257,659
Employee Related Expenses	\$4,208	\$4,310	\$4,412
Employee Expenses	\$2,311	\$2,367	\$2,423
Travel	\$1,897	\$1,943	\$1,989
Labor	\$240,200	\$246,565	\$253,247
	\$240,200	\$246,565	\$253,247
Grand Total	\$5,485,965	\$6,647,205	\$6,835,213

Grand Total

\$110,563

\$110,563

\$110,563

\$174,246

\$174,246

\$174,246

\$1,694,350

\$282,698

\$3,072

\$215,072

\$9,196

\$17,128

\$38,230

\$1,236,653

\$1,236,653

\$174,999

\$77,199

\$97,800

\$3,959,411

\$1,217,695

\$1,217,695

\$2,741,716

\$871,298

\$52,232

\$1,278,331

\$150,000

\$309,855

\$80,000

\$74,250

\$74,250

\$74,250

\$8,736,643

\$82,899

\$10,363

\$72,536

\$2,388,480

\$358,625

\$0

\$250,000

\$660,000

\$60,000

\$300,000

\$504,855

\$45,000

\$60,000

\$90,000

\$60,000

\$313,111

\$29,899

\$46,631

\$205,855

\$15,363

\$15,363

\$1,665,542

\$1,665,542

\$1,621,937

\$947,586

(\$162,962)

\$185,454

\$60,000

\$226,061

\$245,798

\$120,000

\$2,022,876

\$199,711

\$1,730,990

\$92,175

\$545,798

\$25,000

\$245,798

\$275,000

\$96,000

\$96,000

\$337,133

\$337,133

\$337,133

\$1,148,504

\$1,635

\$1,635

\$900,873

\$900,873

\$132,289

\$50,000

\$20,000

\$50,000

\$12,289

\$113,707

\$90,375

\$23,332

\$1,980,342

\$8,133

\$8,133

\$913,191

\$913,191

\$1,059,018

\$931,720

\$127,298

\$752,941

\$12,930

\$7,101

\$5,829

\$740,011

\$740,011

\$18,968,383

**Southern California Edison
ORA-SCE-005 Q1
CARE Administration Budget Request
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						SCE FTEs		
Category	Cost Element	2015	2016	2017	2015 FTE	2016 FTE	2017 FTE	
Outreach	Labor							
		Project Mgr/Mgr	150	150	150	1.3	1.3	1.3
		Non-Mgr	250	250	250	5.4	5.4	5.4
		Labor Total	400	400	400	6.7	6.7	6.7
		Employee Related Expense	40	40	40			
		Contract	473	473	473			
		Postage	1,125	1,125	1,125			
		Other	963	963	963			
		Sub-Total	\$ 3,000	\$ 3,000	\$ 3,000	6.7	6.7	6.7
	Processing, Certification, Recertificatio n	Labor						
		Project Mgr/Mgr	86	86	86	0.8	0.8	0.8
		Non-Mgr	271	271	271	4.8	4.8	4.8
		Labor Total	357	357	357	5.5	5.5	5.5
		Employee Related Expense	-	-	-			
		Contract	314	314	314			
		Postage	34	34	34			
		Other	1	1	1			
		Sub-Total	\$ 707	\$ 707	\$ 707	5.5	5.5	5.5
Post Enrollment		Labor						
		Project Mgr/Mgr	352	352	352	3.1	3.1	3.1
		Non-Mgr	713	713	713	12.5	12.5	12.5
		Labor Total	1,065	1,065	1,065	15.6	15.6	15.6
		Employee Related Expense	-	-	-			
		Contract	595	595	595			
		Postage	35	35	35			
		Other	15	15	15			
		Sub-Total	\$ 1,708	\$ 1,708	\$ 1,708	15.6	15.6	15.6

Southern California Edison
 ORA-SCE-005 Q1
 CARE Administration Budget Request
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						SCE FTEs		
Category	Cost Element	2015	2016	2017	2015 FTE	2016 FTE	2017 FTE	
IT	Labor	-	-	-				
	Employee Related Expense	-	-	-				
	Contract	600	1,200	1,200				
	Other	-	-	-				
	Sub-Total		\$ 600	\$ 1,200	\$ 1,200	0.0	0.0	0.0
Cool Centers	Labor							
		Project Mgr/Mgr	28	29	30	0.2	0.2	0.2
		Labor Total	28	29	30	0.2	0.2	0.2
	Employee Related Expense	-	-	-				
	Contract	-	-	-				
	Other	79	81	81				
Sub-Total		\$ 108	\$ 111	\$ 111	0.2	0.2	0.2	
Pilots	Labor	-	-	-				
	Employee Related Expense	-	-	-				
	Contract	220	225	229				
	Other	-	-	-				
	Sub-Total		\$ 220	\$ 225	\$ 229	0.0	0.0	0.0
Measurement and	Labor	-	-	-				
	Employee Related Expense	-	-	-				
	Contract	50	50	50				
	Other	-	-	-				
	Sub-Total		\$ 50	\$ 50	\$ 50	0.0	0.0	0.0

Southern California Edison
 ORA-SCE-005 Q1
 CARE Administration Budget Request
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					SCE FTEs		
Category	Cost Element	2015	2016	2017	2015 FTE	2016 FTE	2017 FTE
Regulatory Compliance							
Labor	Project Mgr/Mgr	189	194	199	1.5	1.5	1.5
	Non-Mgr	130	133	137	1.3	1.3	1.3
	Labor Total	318	327	336	2.8	2.8	2.8
	Employee Related Expense	32	33	34			
	Contract	-	-	-			
	Other	-	-	-			
Sub-Total		\$ 350	\$ 360	\$ 369	2.8	2.8	2.8
General Administration							
Labor	Project Mgr/Mgr	435	447	459	3.5	3.5	3.5
	Non-Mgr	171	176	180	1.9	1.9	1.9
	Labor Total	606	623	639	5.4	5.4	5.4
	Employee Related Expense	61	62	64			
	Contract	-	-	-			
	Other	-	-	-			
Sub-Total		\$ 667	\$ 685	\$ 703	5.4	5.4	5.4
CPUC Energy Division Staff							
Labor		-	-	-			
	Employee Related Expense	-	-	-			
	Contract	-	-	-			
	Other	140	140	140			
Sub-Total		\$ 140	\$ 140	\$ 140	0.0	0.0	0.0
Total							
Labor	Project Mgr/Mgr	1,240	1,257	1,275	10.3	10.3	10.3
	Non-Mgr	1,534	1,543	1,551	25.9	25.9	25.9
	Labor Total	2,774	2,800	2,826	36.2	36.2	36.2
	Employee Related Expense	132	135	137			
	Contract	2,252	2,856	2,861			
	Postage	1,194	1,194	1,194			
	Other	1,198	1,200	1,200			
Grand-Total		\$ 7,550	\$ 8,185	\$ 8,218	36.2	36.2	36.2

Southern California Edison
Response to ORA-SCE-005 Q1

ATTACHMENT #1 - Administrative CARE Budget									
ADMINISTRATIVE CARE BUDGET REQUESTS SUBMITTED TO CPUC FOR YEARS:	2011	2012	2013	2014	2015	2016	2017	Forecast Method (2015-2017)	Reference Tab
GRAND TOTAL	\$ 5,485,000	\$ 5,351,000	\$ 5,466,000	\$ 5,622,000	\$ 7,550,000	\$ 8,185,000	\$ 8,218,000		
IT Programming	\$ 1,000,000	\$ 950,000	\$ 950,000	\$ 1,000,000	\$ 600,000	\$ 1,200,000	\$ 1,200,000		
IT Programming	1,000,000	950,000	950,000	1,000,000	600,000	1,200,000	1,200,000	based on an average of \$1.0 million annual spending in prior years' requests. Each year's budget request is allocated based on operations resources availability	
Measurement and Evaluation	\$ 56,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000		
Measurement and Evaluation	56,000	50,000	50,000	50,000	50,000	50,000	50,000	Based on Previous Request	
Outreach	\$ 2,230,000	\$ 2,050,000	\$ 2,100,000	\$ 2,155,000	\$ 3,000,000	\$ 3,000,000	\$ 3,000,000		Attachment 2
CARE - Program Services -Sub-Total					\$ 2,085,000	\$ 2,085,000	\$ 2,085,000	2014 Projected with 50% escalation	Attachment 2a
Postage					1,125,000	1,125,000	1,125,000		
Soundbite (Auto Reminder Calls/Marketing)					150,000	150,000	150,000		
Graphics /Printing					750,000	750,000	750,000		
Labor					40,000	40,000	40,000		
Storage					15,000	15,000	15,000		
Webex/Other					5,000	5,000	5,000		
CARE/FERA - Non-Program Services -Sub-Total	\$ 2,230,000	\$ 2,050,000	\$ 2,100,000	\$ 2,155,000	\$ 915,000	\$ 915,000	\$ 915,000		
CARE - Offer Management Marketing					\$ 498,750	\$ 498,750	\$ 498,750	Volume times unit rate	Attachment 2b
FERA - Offer Management Marketing					\$ 26,250	\$ 26,250	\$ 26,250		
CARE - CCC Third Party Vendor Enrollment					\$ 35,000	\$ 35,000	\$ 35,000	Volume times unit rate	Attachment 2c
CARE - CCC Enrollment					\$ 250,000	\$ 250,000	\$ 250,000		
CARE-Capitation					\$ 100,000	\$ 100,000	\$ 100,000	Use 2014 Projected and adjusted downward for trends	
FERA-Capitation					\$ 5,000	\$ 5,000	\$ 5,000		
CARE Outreach	2,230,000	852,281	899,649	896,939					
FERA Outreach		60,000	60,000	60,000					
Labor		145,114	149,468	153,952					
Automatic Enrollment		15,868	15,294	14,703					
2012-14 CARE - Outreach/Marketing Total		500,000	500,000	500,000					
2012-14 CARE Outreach-CCO-SCE Total		100,000	100,000	100,000					
2012-14 CARE-Capitation Total		361,737	360,589	409,407					
2012-14 FERA-Capitation Total		15,000	15,000	20,000					
Pilots	\$ -	\$ -	\$ -	\$ -	\$ 220,320	\$ 224,726	\$ 229,221		
CHANGES	0	0	0	0	220,320	224,726	229,221	Based on the amount authorized in D.14-08-030 plus escalation for 2016 and 2017.	
Post Enrollment Verification	\$ -	\$ 700,000	\$ 700,000	\$ 700,000	\$ 1,708,380	\$ 1,708,380	\$ 1,708,380		
Post Enrollment Verification	0	700,000	700,000	700,000	1,708,380	1,708,380	1,708,380	2014 Authorized with 20% escalation	Attachment 3 - PEV-PCR
Processing, Certification, Recertification	\$ 900,000	\$ 530,000	\$ 559,000	\$ 588,000	\$ 706,560	\$ 706,560	\$ 706,560		
Processing, Certification, Recertification	900,000	530,000	559,000	588,000	706,560	706,560	706,560	2014 Authorized with 20% escalation	Attachment 3 - PEV-PCR
Regulatory Compliance	\$ 145,000	\$ 251,159	\$ 264,919	\$ 263,866	\$ 350,302	\$ 359,760	\$ 369,474		Attachment 4 -GenAdmin - RegComp
Labor Sub-total		\$ 208,659	\$ 214,919	\$ 221,366	\$ 318,457	\$ 327,055	\$ 335,885	Based on Head Count allocated to program. Use standard labor rates per Job Title and annual labor escalation.	
DSM Strategy & Compliance					142,990	146,851	150,816		
EM&V					95,737	98,322	100,977		
External Affairs					79,730	81,882	84,093		
Employee-Related Expense Sub-Total		\$ 42,500	\$ 50,000	\$ 42,500	\$ 31,846	\$ 32,705	\$ 33,589	Based on Percent of labor	
DSM Strategy & Compliance					14,299	14,685	15,082		
EM&V					9,574	9,832	10,098		
External Affairs					7,973	8,188	8,409		
Cool Centers					\$ 107,834	\$ 110,603	\$ 111,393		
Cool Zones					107,834	110,603	111,393		
CPUC Energy Division Staff	\$ 206,000	\$ 140,000	\$ 140,000	\$ 140,000	\$ 140,000	\$ 140,000	\$ 140,000		
CPUC Energy Division Staff	206,000	140,000	140,000	140,000	140,000	140,000	140,000	Based on the amount authorized in D.14-08-030	
General Admin	\$ 948,000	\$ 680,006	\$ 701,700	\$ 724,961	\$ 666,764	\$ 684,767	\$ 703,256		Attachment 4 -GenAdmin - RegComp
Labor Sub-total		\$ 525,613	\$ 541,389	\$ 557,626	\$ 606,149	\$ 622,515	\$ 639,323	Based on Head Count allocated to program. Use standard labor rates per Job Title and annual labor escalation.	
CARE Program Management		457,513	471,239	485,376	578,174	593,785	609,817		
Portfolio Support		68,100	70,150	72,250	27,975	28,731	29,507		
Employee-Related Expense Sub-Total		\$ 154,393	\$ 160,311	\$ 167,335	\$ 60,615	\$ 62,252	\$ 63,932	Based on Percent of labor	
CARE Program Management		150,793	154,061	159,685	57,817	59,378	60,982		
Portfolio Support		3,600	6,250	7,650	2,798	2,873	2,951		
Categories and Subcategories not covered by above		\$ (165)	\$ 381	\$ 173	\$ (161)	\$ 204	\$ (284)	Rounding	

Southern California Edison
2015-2017 ESA-CARE App A.14-11-007

DATA REQUEST SET A.14-11-007-ORA-SCE-011 (2015)

To: ORA

Prepared by: Tory Weber

Title: Principal Manager Energy Efficiency Portfolio

Dated: 03/13/2015

Question 01:

1. Estimate Net Enrollment for 2015-2017

Please provide estimated net customer enrollment values for years 2015, 2016, 2017, akin to the “total” values in tables B-4.

Response to Question 01:

The attached file includes the estimated net customer enrollment values for years 2015, 2016, and 2017 in the same format as the tables in Attachment B-4 of SCE-03.

Southern California Edison
2015-2017 ESA-CARE App A.14-11-007

DATA REQUEST SET A.14-11-007-ORA-SCE-011 (2015)

To: ORA

Prepared by: Tory Weber

Title: Principal Manager Energy Efficiency Portfolio

Dated: 03/13/2015

Question 04:

4. Value of de-enrollment as a result of PEV (2014)

- a. What was the value of the CARE subsidy saved as a result of PEV-related de-enrollment for >600% baseline users (2014)?
- b. What was the value of CARE subsidy saved as a result of PEV-related de-enrollment for standard PEV (including the 400-600% baseline users)?

Response to Question 04:

The attached Excel document and the table below provide the estimated annual value of the CARE subsidy saved per de-enrolled customer as a result of PEV-related de-enrollments in 2014 for greater than 600 percent of baseline and 400-600 percent of baseline customers.

Response to A.14-11-007-ORA -SCE-011 (2015)	
Question 4	
Estimated Annual CARE Subsidy Saved per Customer De-Enrollment Due to Verification Request	
Greater than 600 percent	\$1,573
400 - 600 percent	\$1,050
Less than or equal to 400 percent	\$528

Southern California Edison
2015-2017 ESA-CARE App A.14-11-007

DATA REQUEST SET A.14-11-007-ORA-SCE-011 (2015)

To: ORA
Prepared by: Tory Weber
Title: Principal Manager Energy Efficiency Portfolio
Dated: 03/13/2015

Question 05:

5. Costs and savings related to PEV in 2015, 2016, 2017

a. Please provide estimated costs and subsidy savings for the three years in cycle.

Estimated costs and savings	2015	2016	2017
Cost to PEV >600% cust: (cost per cust, total cost)			
Subsidy saved through anticipated de-enrollment (unit savings, total savings) >600%			
Cost to PEV 600% and below customers (cost per cust, total cost)			
Subsidy saved through anticipated de-enrollment (unit savings, total savings), 600% baseline and less			

b. How did you come up with the values in the table above?

Response to Question 05:

SCE expects to spend approximately \$1.7 million annually on post-enrollment verification (PEV) in 2015 - 2017, as indicated in SCE's PY 2015-2017 CARE Proposed Program Budget shown in Attachment B-1 of Exhibit SCE-03. SCE did not forecast PEV costs and subsidy

savings by greater than 600 percent, and 600 percent and below.

Southern California Edison
2015-2017 ESA-CARE App A.14-11-007

DATA REQUEST SET A.14-11-007-ORA-SCE-011 (2015)

To: ORA

Prepared by: Tory Weber

Title: Principal Manager Energy Efficiency Portfolio

Dated: 03/13/2015

Question 06:

6. PEV Budget Increase

- a. What is the basis for requesting a PEV budget increase for 2015, 2016, 2017 with respect to what was spent in 2014?
- b. What is the expectation/outcome anticipated for the increased budget?
- c. How will you measure success?

Response to Question 06:

- a. SCE describes its overall approach to verification in Exhibit SCE-03 at page 14. Specifically, SCE's 2015-2017 PEV budget is based on plans to verify CARE eligibility of more high-usage customers between 400 percent and 600 percent of baseline and verify CARE eligibility of fewer non-high-use customers. While costs for the two verification approaches are not tracked separately, the high-use verification process is more complex. SCE's 2015-2017 budget forecast of \$1.7 million annually for verification processing costs is a 20 percent increase above the 2014 Authorized amount of \$1.4 million to reflect this increase in the number of more costly high-use verifications.
- b. SCE expects to reduce application processing time, end-to-end cycle times and customer response times in the wake of the increased number of HU PEVs.
- c. Measures of success include:
 - Increased number of high-use customer verifications

Southern California Edison
2015-2017 ESA-CARE App A.14-11-007

DATA REQUEST SET A.14-11-007-ORA-SCE-011 (2015)

To: ORA

Prepared by: Tory Weber

Title: Principal Manager Energy Efficiency Portfolio

Dated: 03/13/2015

Question 07:

7. IT Budget Increase

- a. What is the basis for requesting an IT budget increase for 2015, 2016, 2017 with respect to what was spent in 2014?
- b. What is the expectation/outcome anticipated for the increased budget?
- c. How will you measure success?

Response to Question 07:

- a. SCE's IT budget forecast for Program Cycle 2015-2017 is based on the implementation of the following technology projects which are described in Exhibit SCE-03 of SCE's testimony:
 - Create a verification portal in SCE.com to provide general information about the PEV process and allow online submission of income documents (Exhibit SCE-03, p. 15)
 - Provide an option for electronic fax of income documents for PEV (Exhibit SCE-03, p. 38)
 - Develop enhancements to the current PEV process (Exhibit SCE-03, p. 16)
 - Provide customers with an e-mail option for operational communications and allow reprint of customer requested letters by SCE's call center (Exhibit SCE-03, Attachment B-8)
 - Increase data sharing channels, (e.g., data sharing with California Lifeline, 211), and streamline current data sharing processes (Exhibit SCE-03, pp. 25-26)
- b. The anticipated outcomes for the increased budget are:
 - Reduction in end-to-end cycle time for: enrollment, recertification, and PEV
 - More self-service options available for the customer, reducing number of calls/complaints to the call center
 - Lower program administration costs while streamlining operational activities
- c. Measures of success include:
 - Ease the enrollment, recertification, and PEV process for the customer

Southern California Edison
2015-2017 ESA-CARE App A.14-11-007

DATA REQUEST SET A.14-11-007-ORA-SCE-011 (2015)

To: ORA

Prepared by: Jessica Lim

Title: Principal Manager Marketing

Dated: 03/13/2015

Question 08:

8. Outreach Budget Increase

- a. What is the basis for requesting a PEV budget increase for 2015, 2016, 2017 with respect to what was spent in 2014?
- b. What is the expectation/outcome anticipated for the increased budget?
- c. How will you measure success?

Response to Question 08:

- a. SCE assumes this question is addressing the CARE outreach budget. SCE describes its overall approach to outreach in Exhibit SCE-03, pp. 6-8, 12-13, 21-24. SCE's 2015-2017 budget forecast is based on the need to increase enrollment through increased outreach channels in addition to telephone enrollment, such as direct mail, email and text messaging, in order to address this decline in enrollments. SCE is experiencing declining CARE participation due, in part, to the following reasons:
 - The adoption of more stringent Telephone Customer Protection Act (TCPA) guidelines which places restrictions on automated calls to mobile phones
 - An increase in non-response rates for high-usage customers to post-enrollment verification requests (PEV)
- b. SCE expects to utilize various outreach channels to more effectively target customer segments to enroll eligible customers.
- c. Success will be measured by increased CARE enrollments through channels other than telephone enrollment, such as direct mail, email and text messaging.

Southern California Edison
2015-2017 ESA-CARE App A.14-11-007

DATA REQUEST SET A.14-11-007-ORA-SCE-011 (2015)

To: ORA

Prepared by: Tory Weber

Title: Principal Manager Energy Efficiency Portfolio

Dated: 03/13/2015

Question 09:

9. Budget Metrics

List any internal performance metrics for the following budget categories that are not reflected in CPUC requirements:

- a. Outreach
- b. Processing/Certification, etc.
- c. PEV
- d. IT
- e. General Administration

Response to Question 09:

SCE is not tracking budget metrics that are not reflected in CPUC requirements.

**SOUTHERN CALIFORNIA GAS COMPANY
LOW INCOME ASSISTANCE PROGRAMS & BUDGETS
FOR PROGRAM YEARS 2015-2017
(A.14-11-011)
(ORA-SoCalGas-004)**

QUESTION 1:

Please provide workpapers and related documents that support CARE Administrative budget requests for 2015, 2016, and 2017. Annual details should be provided that show proposed expenses/activities for internal labor (FTEs), contractors, office and other supplies, events, postage, advertising and other marketing tools, etc., in administrative categories and sub-categories described in application.

RESPONSE 1:

Attached please find SoCalGas' workpapers for the 2015-2017 CARE Administrative budgets.



2015-2017 SCG
CARE Workpaper.pdf



SoCalGas CARE
2015-2017 Outreach

**SOUTHERN CALIFORNIA GAS COMPANY
LOW INCOME ASSISTANCE PROGRAMS & BUDGETS
FOR PROGRAM YEARS 2015-2017
(A.14-11-011)
(ORA-SoCalGas-004)**

QUESTION 2:

Provide workpapers that supported CARE applications for program years 2011, 2012, 2013, and 2014, as in Q1.

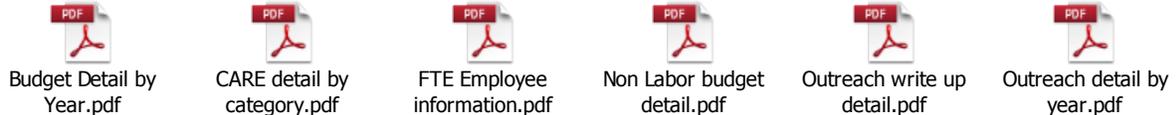
RESPONSE 2:

Attached please find SoCalGas' workpapers for 2011-2014 CARE Administrative budgets. Please note that program year 2011 includes documentation for program years 2009 and 2010. These years were part of the time frame specified in SoCalGas' 2009-2011 Low-Income Application for the CARE program so SoCalGas' work papers were prepared to cover this timeframe.

Program Years 2012-2014:



Program Years 2009-2011:



PACIFIC GAS AND ELECTRIC COMPANY
Low Income Program – Project Year 2015-2017
Application 14-11-010
Data Response

PG&E Data Request No.:	ORA_007-01-03		
PG&E File Name:	LowIncomeProgramPY15-17_DR_ORA_007-Q01-03		
Request Date:	February 20, 2015	Requester DR No.:	010
Date Sent:	March 9, 2015	Requesting Party:	Office of Ratepayer Advocates
PG&E Witness:	Allen Fernandez Smith	Requester:	Alice Glasner

SUBJECT: DATA REQUEST NO: DRA_PG&E_010 (2015)

QUESTION 1

Net Enrollment represented in CARE application for years 2013-2014.

- a. Please explain and quantify the different outreach/enrollment methods that account for the difference between the percentage represented on attachment B-4 and 100%. Include the cost of each additional activity or method.

ANSWER 1

- a. The difference between the percentage represented on attachment B-4 and 100% is because of one of four primary reasons: (1) customers enrolled via online enrollment, (2) customers' response to a previous Post Enrollment Verification (PEV) request, (3) customers' applications requested from the PG&E Call Center, or (4) customers' applications received from previous outreach campaigns that were no longer tracked. The enrollment sources were not included in attachment B-4 as they could not be tied to a specific outreach method.

The updated tables below show the costs and estimated numbers of customers enrolled through these additional enrollment sources.

CARE PY 2013				
Outreach Method	Total Cost [1]	Estimated # of Customers Reached [2]	Estimated # of Customers Enrolled	Percent of Net Enrollments for PY 2013
Automated Voice Messaging (AVM)	\$ 90,000	656,000	12,019	3.8%
Automatic Enrollment	\$ 7,299	n/a	30,400	9.5%
Bill Inserts	\$ 197,000	6,400,000	5,142	1.6%
Community Outreach Contractors	\$ 20,000	n/a	1,015	0.3%
Direct Mail	\$ 1,215,000	1,775,000	19,426	6.1%
Local Office Partnership	\$ 6,000	n/a	12,064	3.8%
Media	\$ 170,000	n/a	n/a	n/a
Online Enrollment	\$ 612,000	n/a	157,161	49.1%

Miscellaneous	\$ 0	n/a	7,099	2.2%
PEV Response	\$ 0	n/a	27,724	8.7%
Standard App (via Call Center)	\$ 236,000	n/a	37,461	11.7%
Welcome Packet Insert	\$ 35,000	500,000	10,791	3.4%

CARE PY 2014				
Outreach Method	Total Cost ^[1]	Estimated # of Customers Reached ^[2]	Estimated # of Customers Enrolled	Percent of Net Enrollments for PY 2014
Automated Voice Messaging (AVM)	\$ 103,000	759,328	14,022	4.1%
Automatic Enrollment	\$ 11,970	n/a	31,515	9.1%
Bill Inserts	\$ 317,000	10,800,000	26,544	7.7%
Community Outreach Contractors	\$ 24,000	n/a	752	0.2%
Digital	\$ 941,000	515,367	15,620	4.5%
Direct Mail	\$ 1,223,000	1,668,487	46,506	13.4%
Email	\$ 320,000	1,143,720	19,835	5.7%
Local Office Partnership	\$ 0	n/a	10,524	3.0%
Media	\$ 422,000	n/a	n/a	n/a
Online Enrollment ^[3]	\$ 441,000	n/a	99,672	28.8%
Miscellaneous	\$ 0	n/a	7,268	2.1%
PEV Response	\$ 0	n/a	31,079	9.0%
Standard App (via Call Center)	\$ 230,000	n/a	39,431	11.4%
Telemarketing	\$ 203,000	41,291	3,015	0.9%
Note: PY2014 numbers updated through December 31, 2014.				
^[1] Costs are estimated and reported in Outreach, IT Programming, and General Administrative budget categories.				
^[2] Not unique since customers receive multiple communications throughout the year; Digital is counting the number of impressions delivered.				
^[3] Does not include online enrollments already counted under Digital, Direct Mail, or Email.				

QUESTION 2

Verification – Non Responses

- a. Please indicate the non-response rate of your 1% random PEV sample.

ANSWER 2

- a. The non-response rate of the 1% random PEV sample in 2014 was approximately 52%, as of January 31, 2015.

QUESTION 3

Budget changes

- a. Please explain the rationale for cost difference in the 2014 Outreach Program and that of 2016 and 2017. This explanation should explain rationale for the millions of

additional dollars more proposed each year and how they compare with activities in 2014.

- b. Do the same for the IT budget, comparing to activities in 2014. This should reflect more than doubling of the budget.

ANSWER 3

- a. PG&E objects to the request to the extent that is vague. Incorporating this objection and without waiver, PG&E responds as follows:

The cost difference for PG&E's outreach activities in 2014, and the budget for outreach activities planned for 2016 and 2017 is primarily because of three changes: (1) proposed tracking certain expenses from the General Administrative budget category to the Outreach budget category, as explained in its testimony; (2) a proposed Community Engagement strategy for 2016 and 2017; and (3) proposed enhancements in the category of Acquisition, Retention, and other outreach related costs.

1. Re-classification of administrative expenses. PG&E's expenses for outreach activities in 2014 were \$6,546,136. Of this amount, \$5,635,990 was reported in the Outreach budget category for community based outreach activities, outreach acquisition, and other outreach related costs, and \$910,146 was reported in the General Administrative budget category for outreach retention activities. Going forward, PG&E intends to re-classify and report the outreach retention costs in the Outreach budget category beginning in 2015¹. This re-classification will allow consistent cost tracking and cost comparison.

PG&E proposes an outreach budget of \$9,361,000 in 2016 and \$10,147,000 in 2017. Of these amounts, \$2,270,000 in 2016 and \$2,497,000 in 2017 represent the amount that would have been included in the General Administrative budget category, if these expenses were tracked in same manner as it was tracked in 2014.

2. Community Engagement Strategy. The second primary difference in the 2014 spend versus the 2016 and 2017 budget for Outreach is because of PG&E's proposed expanded Community Engagement Strategy².

To implement the Community Engagement Strategy, PG&E proposes a budget increase from \$362,000 of actual expenses in 2014 to \$1,852,000 in 2016 and \$1,957,000 in 2017. Below are details of the proposed budget increases:

Up through 2014, PG&E's CARE Program outreach activities with community-based organizations consisted of the capitation fee program and targeted PG&E plans to strengthen partnerships with community partners. These community efforts are designed to enhance partnership activities to increase CARE enrollments and retention efforts, improve awareness/education about CARE, and integrate complementary assistance programs and services moving forward. A detailed explanation of this Strategy is covered in our testimony. Following are examples of

¹ PG&E's Testimony, page 3-54, row 8-18.

² PG&E's Testimony, page 3-21 through page 3-26.

the major proposed budget increases to implement the Community Engagement Strategy:

a. Enhancements to current Community Engagement Strategy.

Program management, research, evaluation design, development of metrics, measures for success, and implementation of the Community Engagement Strategy for community outreach efforts. The estimated cost for this is \$884,000 in 2016 and \$901,000 in 2017. The 2014 cost was \$243,420.

- PG&E will enhance partnerships with the CARE Community Outreach Contractors (COCs) by developing new training materials on low Income programs and services, a new educational toolkit, collateral, and event sponsorships. PG&E will also assess if some of the COCs can be involved in the CARE post enrollment verification process. The Community Engagement team will leverage the Cooling Center partnerships to conduct education and outreach activities at cooling centers throughout the year. PG&E will co-market between the CARE and Lifeline Program through coordinated activities, events and distribution of materials to COCs and Partners. The estimated cost for this initiative is \$490,000 in 2016 and \$500,000 in 2017. The 2014 cost was \$83,886.
- PG&E will coordinate with the COCs, PG&E local offices, ESA contractors and other departments to sponsor local community events and distribute collateral and program applications. The estimated cost for this initiative is \$103,000 in 2016 and \$106,000 in 2017. The 2014 cost was \$34,694.

b. New Elements of Community Engagement Strategy:

- PG&E will develop a Community Ambassadors Program. Invitations will be provided to high-performing, strategic COCs and other CBOs and non-profits with the desire and capacity to take on increased responsibilities within targeted communities in PG&E's service territory. Specifically, they will be conducting further education and outreach on CARE enrollment and retention activities with customers. The estimated cost for this initiative is \$175,000 in 2016 and \$200,000 in 2017.
- PG&E will develop new partnerships with established community networks that currently serve low-income communities. PG&E plans to partner with school and afterschool provider networks to offer a youth-focused energy savings and awareness curriculum to low-income students that can engage families and communities in this assistance. The estimated cost for this initiative is \$100,000 in 2016 and \$150,000 in 2017.
- PG&E plans additional partnerships with community health workers. Community health networks can be key partners in sharing information through linguistic and culturally-competent methods with low income hard

to reach customers about the importance of safe, affordable and reliable energy use and management. The estimated cost for this initiative is \$100,000 in 2016 and \$100,000 in 2017.

3. Acquisition, Retention, and other Outreach related costs. The third primary difference in the 2014 spend versus the 2016 and 2017 budget for Outreach is because of PG&E's proposed enhancements to strategies in area of acquisition, retention and other outreach.

To implement the acquisition and retention work, PG&E has requested an increase from the 2014 spend of \$6,183,947 to a proposed budget of \$7,509,000 in 2016 and \$8,190,000 in 2017. The proposed increases are for continuing successful outreach strategies, and for new strategies to reach the eligible population of CARE customers.

Continued Strategies

Continued strategies are being refined and with significant increase in costs being attributed to the following strategies:

- **Telemarketing** - As PG&E described in ORA_PG&E_005 (2015), PG&E is planning to continue to test and closely monitor the results of telemarketing efforts and to continually refine the customer segments selected to result in overcoming barriers to participation. PG&E has budgeted \$196,000 in incremental funds for 2016, versus 2014 spend, and \$39,600 in incremental funds for 2017. PG&E's 2014 spend in this area was \$203,000.
- **AB 327 Outreach** - PG&E has budgeted incremental funds of \$338,000 for 2016 and \$83,000 for 2017 from the actual 2014 spend of \$515,000 to conduct annual outreach regarding changes to the CARE discount required per AB327, as described on page 3-68 and 3-69 of PG&E's testimony. This outreach effort will educate customers on how to mitigate the impact of increased costs through behavior change or participation in PG&E programs.

New Strategies

PG&E's outreach plan for CARE for this cycle includes new strategies that will be incorporated to increase CARE acquisition to overcome barriers to enrollment and CARE retain customers in the program with new costs included for:

- **Vendor partnerships** - PG&E has budgeted \$47,000 in 2016, and \$4,700 of incremental funds for 2017 to test partnerships for proactive outreach to individuals who recently moved to discuss the CARE Program and enroll qualified customers before they experience bill payment delays. PG&E expects to pay \$45 for each qualified enrollment and has budgeted funds for achieving approximately one thousand enrollments per year.
- **CARE Welcome Kit** - PG&E has budgeted \$1,000,000 in 2016 and an incremental budget of \$128,600 for 2017 to develop and distribute a new CARE customer welcome kit to an approximately 342,000 thousand customers. This \$3 kit will welcome customers to the CARE Program, provide program information, and inform customers of the requirements to maintain enrollment in a format that customers can save for future reference. This kit will help ensure customers are informed of how to maintain enrollment

in the program and reduce the number of customers who are removed due to not completing enrollment requirements such as PEV.

- **Monthly Low-Income e-newsletter** - The CARE and ESA Programs will co-fund a monthly e-newsletter sent to low-income residential customers. The CARE Program will fund \$90,000 per year, which is one-half of the total cost, to produce content and send to customers. The monthly e-newsletter that will include content that is developed specifically for the low income segment while reinforcing CARE Program retention and ESA Program enrollment.

- b. PG&E's CARE IT expenses in 2014 were \$1,162,891. PG&E proposes to spend \$1,500,000 in 2015, \$1,650,000 in 2016 and \$1,750,000 in 2017.

2014 expenses include:

- Internal data sharing
- Data analysis.
- Data reporting
- Improvements and maintenance of PG&E's CARE One system database
- Development, enhancement, and maintenance costs of the online enrollment tools
- Maintenance of the CARE toll-free line 1-866-743-2273
- Other IT-related obligations and costs

In addition to the 2014 costs described above, which PG&E will continue to incur annually, the proposed budget increases in 2015 -2017 are for additional work related to:

- Resume data sharing processes that have been suspended due to privacy concerns and difficulty in completing information security agreements with the energy utilities. The CARE team is working with PG&E's Enterprise Tech Risk Management group to facilitate efficacy in completing the agreements, and PG&E expects to resume data sharing with the energy utilities in 2015. Estimated cost for this initiative is \$50,000 annually.
- On-going enhancement, content update and maintenance of CARE enrollments via the mobile devices platform which include annual update of the CARE income guidelines, content changes related to program requirements and outreach messages, and enhancement to allow cross marketing of the CARE Program with other programs such as Lifeline. Estimated cost for this initiative is \$150,000 annually.
- Develop and maintenance of new heat map and other interfaces, such as customer relationship management (CRM) database, in support of PG&E's strategies with the community based organizations. Estimated cost for this initiative is \$100,000 – \$150,000 annually.

Southern California Edison
2015-2017 ESA-CARE App A.14-11-007

DATA REQUEST SET A.14-11-007-ORA-SCE-007 (2015)

To: ORA

Prepared by: Tory Weber

Title: Principal Manager, Energy Efficiency Portfolio

Dated: 02/25/2015

Question 01:

I'm sure there's an explanation, but could one of your colleagues explain why actuals for 2013, in the Outreach category, have two different total values? Please refer to the CARE application, tables B1 and B4.

Response to Question 01:

The outreach costs shown in Attachment B-1a provides SCE's CARE expenses using the CPUC's cost category definitions for reporting. The outreach costs shown in Attachment B-4 provides the total end-to-end cost of a particular outreach method and include processing/certification re-certification expenses and post enrollment verifications that are captured outside of the outreach cost category in Attachment B1a (e.g., the Annual Solicitation total cost in Attachment B-4 includes processing expenses and post enrollment verifications which would be recorded in Processing, Certification, Recertification in attachment B-1a).

Glasner, Alice

From: Yamagata, Joy C. <JYamagata@semptrautilities.com>
Sent: Wednesday, March 11, 2015 10:43 AM
To: Glasner, Alice
Subject: RE: SDGE App question

Alice – per your request.

Table B-4 is for outreach initiatives cost only. There are additional cost included in Outreach that are not represented in the table. These cost include, SDGE&E labor, postage for applications, income verification and renewals, travel, and other miscellaneous expenses.

*Joy Yamagata
Regulatory Manager
San Diego Gas & Electric Company
yamagata@semptrautilities.com*

From: Glasner, Alice [mailto:alice.glasner@cpsc.ca.gov]
Sent: Wednesday, February 25, 2015 9:48 AM
To: Yamagata, Joy C.
Subject: SDGE App question

Hi Joy,

I just noticed that there is some inconsistency in tables within your CARE application, so perhaps there is something that I don't follow. For example, if you look at table B4(attachment,app) and Table 9 (testimony), at the year 2013 actuals for 2013 they don't match up (about \$600,000) difference. Could one of your colleagues explain the difference?

Thanks,
Alice

Alice Glasner
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PACIFIC GAS AND ELECTRIC COMPANY
Low Income Program – Project Year 2015-2017
Application 14-11-010
Data Response

PG&E Data Request No.:	ORA_005-01-05		
PG&E File Name:	LowIncomeProgramPY15-17_DR_ORA_005-Q01-05		
Request Date:	January 26, 2015	Requester DR No.:	008
Date Sent:	February 9, 2015	Requesting Party:	Office of Ratepayer Advocates
PG&E Witness:	Allen Fernandez Smith	Requester:	Alice Glasner

QUESTION 1 – PEV ANALYSES AND MODELS

- a. How does the high number of non-responses to PEV verification letters affect the reliability/certainty of the probability model outcomes and the creation of “best practices”? Include any work papers or calculations used to develop the answer.

ANSWER 1

- a. For Post Enrollment Verification (PEV), PG&E’s CARE Qualification Probability Model was developed to target customers whose total annual household income is above the CARE income guidelines. The Long Term Model is designed to overlook potential non-responders who look eligible through their PG&E transactions, but are also likely to not respond to the PEV request. This is achieved by an algorithm that looks at the degree to which third-party data overlays are missing, indicating a customer has short tenure and may be more transient and less established. The end result is that the model targets customers for PEV who are likely ineligible and would be denied, regardless of likelihood to respond. PG&E’s Standard PEV non-response rate decreased from 62% to 52% as a result of this enhancement.

The model is not impacted by the number of non-responders because the model was developed to target ineligible customers, regardless of likelihood to respond. While the PEV non-response rate has decreased, it is not possible to ascertain whether those non-responders are truly ineligible without reviewing their actual documentation. PG&E understands, however, that other indicators such as payment methods and lack of payment notices suggest ineligibility.

QUESTION 2 – VERIFICATION – NON RESPONSES

- a. Within the PG&E budget, what is the cost of verifying a customer who responds to the first or second inquiry? Please explain and quantify. Indicate costs and what those costs are related to (e.g. multiple direct mailings/postage, customer center contacts), as applicable.
- b. Within the PG&E budget, what is the cost of verifying a customer who never responds to the verification inquiry? Please explain and quantify. Indicate costs and

what those costs are related to (e.g. multiple direct mailings/postage, customer center contacts), as applicable.

ANSWER 2

- a. PG&E tracks enrollment verification costs in three budget categories: 1) verification labor costs in the Post Enrollment Verification budget; 2) postage costs in the Outreach budget; and 3) material costs in the General Administrative category. In 2014, the cost of verifying 28,400 customers who responded to the first or second inquiry is approximately \$1.451 million (an average of \$51.10 for each of these customers). Further breakdown of these 2014 costs follow:

\$1,275,340 in verification labor costs include:

- Opening, sorting, scanning, data entry and processing of PEV documents and correspondence.
- Initiating and responding to customers' inquiries by mail, e-mail or phone.
- Resolving bill issues.
- Data management, training and other related costs.

\$67,000 in postage costs include:

- Postage for multiple mailings: PEV letters, follow-up letters for additional information, and confirmation letters.
- Pre-paid postage for customers to send back their documents.

\$109,000 in material costs include:

- Printing for multiple mailings: PEV letters, follow-up letters for additional information, and confirmation letters.
- Envelopes for mailing and returning.

- b. PG&E estimates that the total cost of verifying 69,700 customers who never responded to the verification inquiry in 2014 was approximately \$201,000 (an average of \$2.88 for each of these customers). This cost includes \$68,000 in postage and \$133,000 in materials for mailing the original PEV letter requesting documentation, and a follow-up letter notifying customers that they are no longer eligible for the CARE discount due to failure to provide the required documentation.

QUESTION 3 – DE-ENROLLMENT AND APPEALS (BOTH HIGH USE AND UNDER 400% OF BASELINE) REQUESTS FOR RE-ENROLLMENT)

- a. Quantify appeals (number and percentage of de-enrolls) as a result of de-enrollment for 2013 and 2014. Differentiate High Users from other <400% baseline customers after PEV.
- b. To-date, how many customers have appealed their removal from CARE due to the high usage rules?

- c. Please provide all High User appeal letters in electronic format that have been granted.
- d. Of the High User appeals received, how many and what percentage have been granted?
- e. Report number of High Users and under 400% (separately) that have been re-enrolled in 2013-2014.
- f. What does re-enrollment cost if an appeal is granted? Please explain and quantify.
- g. What is the annual subsidy amount of the High Users and other PEV targets (under 400% baseline) that PG&E has de-enrolled for 2013 and 2014?
- h. What is the annual subsidy amount of the High User appeals and other re-enrollments (under 400% baseline) that PG&E has granted for 2013 and 2014 (do not include granted appeals)?
- i. Has PG&E credited all re-enrolled customers for the time they were removed from CARE program in 2013 and 2014? Explain

ANSWER 3

- a. For 2013 and 2014, PG&E removed 643 customers from CARE for usage above 600% of baseline. Of those, 279 (46%) have appealed their removal.

For 2013 and 2014, PG&E removed 59,032 customers from CARE for failing the High Usage (above 400% of baseline) PEV process and 101,239 other customers from CARE for failing the Standard (below 400% of baseline) PEV process.

Customers removed from CARE for failing the PEV processes can only be re-enrolled by complying with the original PEV request; i.e., by providing qualifying household income documentation or proof of categorical eligibility program enrollment (Standard PEV); or by providing qualifying household IRS Tax Transcripts and completing the ESA participation requirement (High Usage PEV).

- b. For 2013 and 2014, 279 customers have appealed their removal from CARE due to usage above 600% of baseline.

- c. [REDACTED]

- d. Of the 279 High User appeals received, 197 (71%) have been granted.

- e. 5,838 High Users and 19,832 Standard PEV customers have been re-enrolled after previous removal for failing the PEV process in 2013-2014. These customers became eligible for re-enrollment by complying with the original PEV request.
- f. If an appeal is granted, PG&E estimates the re-enrollment cost for each successful appeal is \$2.41, which includes \$1.66 for processing and \$0.75 for material and postage to mail a letter confirming customer appeal status.
- g. The annual subsidy amount of customers that PG&E has removed from CARE via the High Usage and Standard PEV processes for 2013 and 2014 is approximately \$110 million (High Usage) and \$40 million (Standard).
- h. The annual subsidy amount of the High User appeals granted is approximately \$715,000.

The annual subsidy amount of High Usage PEV customers re-enrolled is approximately \$11 million.

The annual subsidy amount of Standard PEV customers re-enrolled is approximately \$10 million.

(Subsidy estimates are based on previous annual usage applied to PG&E's current residential electric rate schedule, effective January 1, 2015.)

- i. In general, PG&E only credits re-enrolled customers for the time they were removed from CARE if the time removed was due to an error on PG&E's part. If they are re-enrolled during the same billing period in which they were removed, no credit is necessary.

QUESTION 4 – LIFELINE COORDINATION

- a. How will PG&E track the enrollment cost/outcome of coordinating outreach with Lifeline providers/marketers? Please indicate the expenses budgeted for this coordination (for each year of 2015-2017), if it is not already included in your response to Data Request CARE 006 (2015).

ANSWER 4

- a. PG&E will track the enrollment cost and outcome of coordinating outreach with Lifeline providers and marketers through the CARE Outreach budget category. New enrollments will be tracked by a source code on the completed applications. Expenses budgeted for this coordination are not stand-alone, and are built in to the Outreach budget category for co-marketing and Community Outreach Contractor activities. These expenses were included in PG&E's Data Response ORA_003-Q01 sent on February 3, 2015.

QUESTION 5 – BUDGET (PROVIDE ALL TABLES AS EXCEL SPREADSHEETS)

- a. Clarify what the CPUC has authorized for the PG&E CARE administrative 2015 budget and what PG&E is proposing. Please explain the differences, and how they create more effective/efficient administration. In the description, clarify whether the CPUC authorized the same admin budget for 2014 as 2015.
- b. What is the total administrative budget spent for 2014? Additionally, please supply an updated Table B1a with actuals for 2014.

ANSWER 5

- a. The CPUC has authorized \$14,946,832 for PG&E's CARE administrative 2015 budget, which is the same as the 2014 authorized budget with a 2% increase for the CHANGES Pilot Program. PG&E has estimated its 2015 expenses to be as follows:

CARE Budget Categories	2015 Authorized Budget	2015 Estimated Expenses	Amount Increased/Decreased
Outreach	\$5,667,666	\$7,900,000	\$2,232,334
Processing, Certification, Recertification	\$3,729,000	\$1,800,000	\$(1,929,000)
Post Enrollment Verification	\$1,920,000	\$1,600,000	\$(320,000)
IT Programming	\$651,000	\$1,500,000	\$849,000
Cool Centers	\$134,846	\$130,000	\$(4,846)
Pilots	\$220,320	\$220,320	\$0
Measurement and Evaluation	\$48,000	\$74,000	\$26,000
Regulatory Compliance	\$342,000	\$270,000	\$(72,000)
General Administration	\$2,106,000	\$1,200,000	\$(906,000)
CPUC Energy Division Staff	\$128,000	\$128,000	\$0
SUBTOTAL MANAGEMENT COSTS	\$14,946,832	\$14,822,320	\$(124,512)

As the Table above indicates, PG&E anticipates it may be over budget in the following areas as explained for each category:

- Outreach. PG&E's increased administrative budget for outreach exists for several reasons:
 - 1) Increased outreach activities through multi waves and various outreach methods, and higher costs to outreach to eligible, unenrolled customers that have high barriers to participation;
 - 2) Increased outreach activities and costs to leverages the expertise of community-based organizations and the resources they provide; and
 - 3) Shift retention costs associated with the welcome kit and pre-notification of rate changes (AB 327) from the General Administrative budget category into the Outreach budget category to allow for consistent cost tracking.

- IT Programming. PG&E's increased administrative budget for IT Programming exists for several reasons: continued database improvements, enhancements and development of online enrollment tools, including mobile access enrollment.
 - Measurement and Evaluation. PG&E's increased administrative budget for Measurement and Evaluation exists to conduct annual eligibility estimate and additional analyses, as needed.
- b. The total administrative budget spent for 2014 is \$12,281,846 as of December 31, 2014. Final 2014 expenditures will be reported in the 2014 CARE Annual Report to be filed on May 1st, 2015.

CARE Table B-1 through December 31, 2014 as filed with the Commission on January 21, 2015 is shown below (the Excel file can be found on the CPUC's Energy Efficiency Statistics website):

CARE Table 1 - CARE Program Expenses - PG&E						
Through December 31, 2014						
CARE Program:	Authorized Budget			Year to Date Expenses		
	Electric	Gas	Total	Electric	Gas	Total
Outreach [1][6]	\$ 4,735,628	\$ 1,110,826	\$ 5,846,455	\$ 4,565,152	\$ 1,070,838	\$ 5,635,990
Processing, Certification, Recertification [6]	\$ 3,208,475	\$ 752,605	\$ 3,961,081	\$ 1,287,618	\$ 302,034	\$ 1,589,652
Post Enrollment Verification [6]	\$ 1,698,680	\$ 398,456	\$ 2,097,136	\$ 1,033,025	\$ 242,315	\$ 1,275,340
IT Programming [2] [6]	\$ 595,993	\$ 139,801	\$ 735,794	\$ 941,942	\$ 220,949	\$ 1,162,891
Cooling Centers [6]	\$ 134,904		\$ 134,904	\$ 110,262	\$ -	\$ 110,262
CHANGES Pilot Program [3][6]	\$ 180,218	\$ 42,273	\$ 222,491	\$ 202,695	\$ 47,546	\$ 250,241
Measurement & Evaluation	\$ 38,880	\$ 9,120	\$ 48,000	\$ 58,874	\$ 13,810	\$ 72,684
Regulatory Compliance [6]	\$ 313,946	\$ 73,642	\$ 387,587	\$ 199,866	\$ 46,882	\$ 246,749
General Administration [6]	\$ 1,805,543	\$ 423,523	\$ 2,229,066	\$ 1,533,849	\$ 359,792	\$ 1,893,641
CPUC Energy Division Staff	\$ 103,680	\$ 24,320	\$ 128,000	\$ 35,960	\$ 8,435	\$ 44,395
SUBTOTAL PROGRAM COSTS	\$ 12,815,947	\$ 2,974,566	\$ 15,790,513	\$ 9,969,245	\$ 2,312,601	\$ 12,281,846
CARE Rate Discount [4]	\$ 490,819,500	\$ 115,130,500	\$ 605,950,000	\$ 522,526,187	\$ 84,680,578	\$ 607,206,765
TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	\$ 503,635,447	\$ 118,105,066	\$ 621,740,513	\$ 532,495,432	\$ 86,993,179	\$ 619,488,611
Other CARE Rate Benefits						
- DWR Bond Charge Exemption				\$ 38,473,818		\$ 38,473,818
- CARE PPP Exemption [5]				\$ 52,067,094	\$ 8,552,340	\$ 60,619,433
- California Solar Initiative Exemption				\$ 6,671,728		\$ 6,671,728
- kWh Surcharge Exemption						
Total - Other CARE Rate Benefits				\$ 97,212,640	\$ 8,552,340	\$ 105,764,980
Indirect Costs [6]				\$ -	\$ -	\$ -

**PACIFIC GAS AND ELECTRIC COMPANY
Low Income Program – Project Year 2015-2017
Application 14-11-010
Data Response**

PG&E Data Request No.:	ORA_012-01-10		
PG&E File Name:	LowIncomeProgramPY15-17_DR_ORA_012-Q01-10		
Request Date:	March 16, 2015	Requester DR No.:	015
Date Sent:	March 27, 2015	Requesting Party:	Office of Ratepayer Advocates
PG&E Witness:	Allen Fernandez Smith	Requester:	Alice Glasner

QUESTION 1

Random PEV sample (1%)

(Please respond with respect to 2014 results)

- a. What purpose has the 1% random sample served for 2014 PEV?
- b. Why is the non-response rate the same for the 1% random sample as the “standard” sample in its entirety?
- c. What is the verified eligible rate of the random sample?
- d. What is the verified ineligible rate of the random PEV sample?

ANSWER 1

- a. The random sample serves to measure verification rates of customers who are randomly selected against customers who are specifically selected based on their score in the probability model.
- b. PG&E conducts “Standard” PEV for customers with usage below 400% of baseline, including those customers selected randomly and those selected based on model score.

The non-response rate is not the same for the 1% random sample as those selected by model score. As of February 28, 2015, the non-response rate of customers randomly selected for PEV in 2014 is 52%, compared to 45% for customers selected by model score.

- c. As of February 28, 2015, the verified eligible rate of customers randomly selected for PEV in 2014 is 43%.
- d. As of February 28, 2015, the verified ineligible rate of customers randomly selected for PEV in 2014 is 5.1%.

QUESTION 2

Other Parties’ Data Requests

Please provide electronic copies of all Data Requests that other parties (non-ORA) have conveyed to PG&E regarding Application A14-11-007 et al and the responses you sent in reply. Please treat this as a continuing request, and please update your response periodically. In lieu of providing copies of the requested documents, you may respond by providing access to an electronic repository of these documents.

ANSWER 2

PG&E is providing its responses to TURN’s data requests 001-003 in the following attached zip files:

LIP_PY15-17_DR_TURN_001-Q1-6

LIP_PY15-17_DR_TURN_002_Q1-8

LIP_PY15-17_DR_TURN_003_Q1-7

QUESTION 3

Splitting Standard and High User PEV costs (2014)

- a. What was the cost of the >600% baseline PEV (for 2014 only)?
- b. What was the cost of the standard PEV (including the 400-600% baseline users, for 2014 only)?
- c. What was the total cost of PEV modeling for 2014, including labor, materials, IT?

ANSWER 3

PG&E considers the High Usage PEV group to be customers with usage >400% of baseline in any monthly billing cycle and Standard PEV group as customers with usage below 400% of baseline.

a-c. PG&E does not track Standard and High Usage PEV costs separately. The following cost split is estimated based on PEV quantity.

2014 PEV Cost	Standard PEV	High Usage PEV (>400% baseline)	Total
Estimated total labor cost	\$785,810	\$489,530	\$1,275,340
Estimated total material cost (responded)	\$64,000	\$112,000	\$176,000
Estimated total material costs (non-responded)	\$60,000	\$141,000	\$201,000
PEV Model	\$82,000	\$82,000	\$164,000
Grand Total (labor + material)	\$991,810	\$824,530	\$1,816,340

Note: PG&E tracks enrollment verification costs in three budget categories: 1) verification labor costs in the Post Enrollment Verification budget category; 2) postage costs in Outreach budget category; and 3) materials and PEV Model in General Administrative budget category.

QUESTION 4

Value of de-enrollment as a result of PEV (2014)

- a. What was the value of the CARE subsidy saved as a result of PEV-related de-enrollment for >600% baseline users (2014)?
- b. What was the value of CARE subsidy saved as a result of PEV-related de-enrollment for standard PEV (including the 400-600% baseline users)?

ANSWER 4

PG&E considers the High Usage PEV group to be customers with usage >400% of baseline in any monthly billing cycle and the Standard PEV group as customers with usage below 400% of baseline.

- a. As of February 28, 2015, the estimated total annual CARE subsidy saved due to customers removed for failing High Usage PEV requests mailed in 2014 was \$51 million.
- b. As of February 28, 2015, the estimated total annual CARE subsidy saved due to customers removed for failing Standard PEV requests mailed in 2014 was \$10 million.

QUESTION 5

Costs and savings related to PEV in 2015, 2016, 2017

- a. Please provide estimated costs and subsidy savings for the three years in cycle.

Estimated costs and savings	2015	2016	2017
Cost to PEV >600% cust: (cost per cust, total cost)			
Subsidy saved through anticipated de-enrollment (unit savings, total savings) >600%			
Cost to PEV 600% and below customers (cost per cust, total cost)			
Subsidy saved through anticipated de-enrollment (unit savings, total savings), 600% baseline and less			

- b. How did you come up with the values in the table above?

ANSWER 5

PG&E considers the High Usage PEV group to be customers with usage >400% of baseline in any monthly billing cycle and the Standard PEV group as customers with usage below 400% of baseline.

- a. Please see the estimated annual costs and subsidy savings for the three cycle years in the table below.

Estimated costs and savings	2015	2016	2017
High Usage PEV Cost (cost per cust, total cost)	\$23.47 per customer \$1,056,000 total	\$30.14 per customer \$1,055,000 total	\$33.10 per customer \$993,000 total
High Usage PEV Subsidy Savings (unit savings, total savings)	\$1,400 per customer \$50M total	\$1,400 per customer \$35M total	\$1,400 per customer \$30M total
Standard PEV Cost (cost per cust, total cost)	\$18.65 per customer \$1,026,000 total	\$19.24 per customer \$1,058,000 total	\$19.80 per customer \$1,089,000 total
Standard PEV Subsidy Savings (unit savings, total savings)	\$400 per customer \$10M total	\$400 per customer \$10M total	\$400 per customer \$10M total

- b. The equation used to calculate PEV Subsidy Savings above for customers removed from CARE is *Annual Usage by Tier x (Non-CARE Rate – CARE Rate)*. Estimates are based on PG&E’s residential electric rate schedule effective January 1, 2015.

The estimated costs for Standard PEV and High Usage PEV in the table above are calculated based on 2014 costs using the following assumptions:

Estimated PEV Costs	2014	2015	2016	2017
Standard PEV quantity	54,727	55,000	55,000	55,000
Standard PEV response (40% annually)	21,891	22,000	22,000	22,000
Labor Cost Per Standard PEV response (3% annual escalation)	\$35.90	\$36.97	\$38.08	\$39.23
Non-Labor Cost per Standard PEV request (3% annual escalation)	\$3.76	\$3.88	\$3.99	\$4.11
Standard PEV - Labor costs	\$785,810	\$813,000	\$838,000	\$863,000
Standard PEV - Non-labor costs	\$206,000	\$213,000	\$220,000	\$226,000
Total Standard PEV cost	\$991,814	\$1,026,000	\$1,058,000	\$1,089,000
Cost per Standard PEV customer	\$18.12	\$18.65	\$19.24	\$19.80
High Usage PEV quantity	43,372	45,000	35,000	30,000
High Usage PEV Response (15% in 2014, 20% in 2015, 27.5% in 2016, 30% in 2017)	6,506	9,000	9,625	9,000
Labor Cost Per High Usage PEV response (3% annual escalation)	\$75.25	\$77.50	\$79.83	\$82.22
Non-Labor Cost per High Usage PEV request (3% annual escalation)	\$7.72	\$7.96	\$8.19	\$8.44
High Usage PEV - Labor costs	\$489,530	\$698,000	\$768,000	\$740,000
High Usage PEV - Non-labor costs	\$335,000	\$358,000	\$287,000	\$253,000
Total High Usage PEV cost	\$824,530	\$1,056,000	\$1,055,000	\$993,000
Cost per High Usage PEV customer	\$19.01	\$23.47	\$30.14	\$33.10

Total Standard and High Usage PEV Labor Cost	\$1,275,340	\$1,511,000	\$1,606,000	\$1,603,000
Total Standard and High Usage PEV Non-Labor Cost	\$541,000	\$571,000	\$507,000	\$479,000
Grand Total - PEV Cost	\$1,816,340	\$2,082,000	\$2,113,000	\$2,082,000

QUESTION 6

PEV Budget Increase

- a. What is the basis for requesting a PEV budget increase for 2015, 2016, 2017 with respect to what was spent in 2014?
- b. What is the expectation/outcome anticipated for the increased budget?
- c. How will you measure success?

ANSWER 6

- a. The bases for requesting a PEV budget increase for 2015, 2016, 2017 with respect to what was spent in 2014 are:
 - 1. Increases in High Usage PEV labor cost due to anticipated increases in response rate (as customers become more familiar with the process) from 15 percent in 2014 to 20 percent in 2015, 27.5 percent in 2016 and 30 percent in 2017, and
 - 2. Annual cost increase at 3 percent escalation.
- b. The expectation/outcome anticipated for the increased PEV budget is:
 - 1. Have adequate resources to process the increases number of PEV responses in a timely manner.
- c. PEV success is being measured by the following criteria:
 - 1. All PEV responses are processed within 10 calendar days or less from the receiving date.
 - 2. Processing 13-15 PEV documents per hour per individual productivity and 90% accuracy rate.

QUESTION 7

IT BUDGET INCREASE

- a. What is the expectation/outcome anticipated for the increased budget?
- b. How will you measure success?

ANSWER 7

PG&E objects to the request as vague and ambiguous. Subject to this objection and without waiver, PG&E responds as follows:

- a. The expectation/outcome anticipated for the increased IT budget is to:
 1. Continue to provide customer with online enrollment tools.
 2. Enable customers to enroll in CARE using mobile channels such as smart phones and tablets.
 3. Resume external data sharing with other utilities.
 4. Implement alerts in the customer care (CC&B) and online systems (My Energy) that will enable targeted customers who are most likely eligible for CARE to enroll in the program.
 5. Reduce invalid enrollments by implementing alerts that prevents customer service representatives from offering CARE to customers who are blocked from self-certified re-enrollment for 24 months.
 6. Transform reports from a mainframe system that is being retired to a self-service platform.
 7. Enable electronic notification during the CARE recertification process.
 8. Provide additional tools in support of PG&E's strategies with community based organizations.
- b. IT success is being measured by the following criteria:
 1. Increase customer satisfaction by providing the ability to enroll in CARE using mobile channels in addition to online, mail, fax and phone.
 2. Increase customer retention during the CARE recertification process by providing electronic notification in addition to paper and voice messaging.
 3. Reduce cost of service to process CARE enrollment applications by reducing invalid CARE enrollments from 38% to 25% of 2014 call volumes.
 4. Increase CARE customer acquisition that will contribute towards penetration rate goal.
 5. Reduce cost of data processing and maintenance of reports for Post Enrollment Verification and monitoring of customers with high usage.

PG&E also incorporates by reference its 2015-2017 application for approval of its CARE/ESA proposed programs and budgets, as its applications contains it justifications for its proposals.

QUESTION 8

Outreach Budget Increase

- a. What is the expectation/outcome anticipated for the increased budget?
- b. How will you measure success?

ANSWER 8

- a. The expectation/outcome anticipated for the increased Outreach budget is:
 1. Community Engagement Strategy
The expectation and outcome anticipated for the increased budget is an increase in the acquisition efforts to enroll low income customers that aren't reached by traditional and innovative marketing outreach. In addition, retention

efforts will be supported through education and awareness activities related to rate reform.

The increase in funding will support the following needed activities that will increase the targeting and support for acquisition and retention activities:

- Further support the Community Outreach Contractors through new educational materials, more tailored technical assistance and support through the development and application of a new customer relationship management database and assessing the expansion of their role into Post Enrollment Verification
- Sponsorship of events to extend the outreach of Community Outreach Contractors to the Hard to Reach populations
- Provide support through collateral, events, and training to local offices to better reach qualified customers
- Conduct outreach and education through the Cooling Centers
- Increase the value of the CARE offering through co-marketing with the LifeLine offering that has been requested by the CPUC
- Elicit and share best practices amongst the Community Outreach Contractors in both the priority rural counties and high poverty counties (pg. 3-39 & 3-41)
- Develop a new Community Ambassador Program that increases direct acquisition and retention responsibilities beyond Community Outreach Contractor activity
- Leverage new partnership with after school programs that serve low income students and families
- Leverage new partnerships with community health networks to conduct acquisition and retention efforts in Spanish to targeted areas with lower CARE penetration rates

2. Customer Outreach

The expectation for the additional funding requested for customer outreach will provide additional funding necessary to reach and enroll CARE eligible customers and effectively retain current customers in the program. The increased funding will support acquisition efforts to:

- Reach customers through the continued use of methods that drive customer enrollments in the CARE program such as direct mail.
- Refine telemarketing outreach to reach customers in a more personal manner, while working to achieve an optimized cost per acquisition.
- Utilize customer outreach through email to increase the enrollments achieved through this method, given that the cost per acquisition is lower than methods such as direct mail.
- Conduct in person outreach with customers at community events and festivals, such as the recent participation in the Chinese Lunar New Year Festival in San Francisco.
- Conduct outreach through vendor partnerships with companies working with customers, and provide them information to qualify customers for enrollment.
- Continue website improvements for enhanced customer usability and effective communication of program elements.

- Conduct research and analyze customer data to help inform strategies and messaging utilized during the cycle to reach customers through outreach tactics and messaging that help to overcome barriers to enrollment.
- Quantify the Hard to Reach segments using customer data and determine outreach methods effective at reaching those segments.

The increased funding will support retention efforts to:

- Conduct outreach to CARE customers to inform them of changes to the CARE discount per AB327 and educate them on programs and resources that can help manage their bill.
- Provide newly enrolled customers with a welcome kit when they join the program in order to minimize attrition. The welcome kit will provide program information and requirements, including the possibility of selection for Post Enrollment Verification.
- Send customers who have provided an email address a monthly e-newsletter that is co-funded by the CARE and ESA outreach budgets. The e-newsletter will provide customers with continued education and outreach in support of the CARE and ESA programs and inform customers of other resources such as PG&E's payment plan options.

b. Outreach success is being measured by the following criteria:

1. Community Engagement Strategy success will be measured by:

- Number of COCs contracted for complete coverage in all 48 counties of PG&E's service area
- Number of community events participated in targeted areas (i.e. rural)
- Number of applications distributed to various channels (i.e. local offices, COCs, etc)
- Survey results/customer satisfaction after each presentation

A mix of different strategies are being used to acquire and retain CARE customers. All the strategies will be assessed to ensure they are supporting the overall acquisition and retention outcomes. Performance will be tracked and assessments will be conducted of all the strategies to make sure they are reviewed for improvements, discontinuation and identification of new strategies that would better support the Community Engagement work that supports the marketing activities for acquisition and retention of CARE customers. After the assessment, the following actions will be taken to improve, change and refine the overall Community Engagement Strategy:

- Make adjustments and improvements to the strategies being employed by the Community Engagement Strategy
- Discontinue strategies that do not significantly contribute to the retention, acquisition and education and awareness raising activities
- Better integrate strategies so that there is coordination and alignment across different strategies
- Refine technical assistance, collateral and educational materials and the best coordination of support through the relationship management database

- Better coordination of the Community Engagement Strategy with the marketing initiatives based on what is learned from coordination activities and lessons learned
2. Customer Outreach success will be measured by:
- Achieving yearly enrollment and retention goals
 - Refined strategies that continue to maximize the effectiveness of each acquisition channel
 - Refined strategies for customer retention to continually maximize effectiveness of retaining eligible customers.
 - Continued analysis and refinement of the mix of outreach channels and cost per acquisition to achieve an appropriate mix to reach eligible customers.
 - Integration of new strategies to reach the customer segments with barriers to enrollment.

PG&E also incorporates by reference its 2015-2017 application for approval of its CARE/ESA proposed programs and budgets, as its applications contains it justifications for its proposals.

QUESTION 9

Processing Budget Increase

- a. What is the basis for requesting a processing budget increase for 2015, 2016, 2017 with respect to what was spent in 2014?
- b. What is the expectation/outcome anticipated for the increased budget?
- c. How will you measure success

ANSWER 9

- a. The basis for requesting a processing budget increase for 2015, 2016, 2017 with respect to what was spent in 2014 are:
 1. PG&E implemented a CARE system upgrade in December 2014 that allow collection of customer information provided on the application such as household size, participated categorical program or household income, communication references, etc. As the result, it takes longer to process each application hence the increases in labor cost.
 2. Annual cost increase at 3 percent escalation.
- b. The expectation/outcome anticipated for the increased Processing budget is:
 1. Have adequate resource to process all applications in a timely manner.
 2. Ability to collect additional customer information for tracking, reporting and analysis.
- c. Processing success is being measure by the following criteria:
 1. All applications are processed within 10 calendar days or less from the receiving date.

2. Processing 23-26 applications per hour per individual productivity and 90% accuracy rate.

PG&E also incorporates by reference its 2015-2017 application for approval of its CARE/ESA proposed programs and budgets, as its applications contains it justifications for its proposals.

QUESTION 10

Budget Metrics

List any internal performance metrics for the following budget categories that are not reflected in CPUC requirements:

- a. Outreach
- b. Processing/Certification, etc.
- c. PEV
- d. IT
- e. General Administration

ANSWER 10

Please refer to Answers 6, 7, 8, and 9 above for internal performance metrics that are not reflected in CPUC requirements.

PG&E also incorporates by reference its 2015-2017 application for approval of its CARE/ESA proposed programs and budgets, as its applications contains it justifications for its proposals.

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QUESTION 1:

PEV and Re-certification

- a. Provide information on CARE population that re-certifies every 4 years instead of every 2 years:

	2012	2013	2014	Notes
Number and Percent CARE customers Re-certifying on 4-year cycle.				
Cost savings per unit (please define) to recertify every 4 instead of every 2 years.				
Total cost to recertify customers each year (combine 2-year and 4-yr schedules).				
Total cost <i>if all customers had been on a two year cycle.</i>				

- b. How many customers do you anticipate will receive (PEV) verification requests in 2015, 2016, and 2017?
- c. Please provide a copy of the verification request letter sent in January 2015. If there are variations in f norms sent out, other than language, please explain.

RESPONSE 1a:

Customers on CARE for two years are evaluated by the CARE probability model. Those found to be more than 85% likely to be CARE eligible are granted *soft-approval*, thus are not required to recertify, for a total of four years. They are then subject to recertification every two years thereafter.

Customers, deemed by the model to be less than 85% likely to be CARE eligible are required to recertify and are mailed a recertification application. Additionally, customers on a “fixed income” (e.g., those receiving Social Security benefits, certain pensions, SSI, SSD, SSP6 and/or Medi-Cal benefits) are also required to recertify their eligibility every four years instead of two years. Regardless of the two or four year recertification requirements, all customers are notified by SoCalGas when their

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RESPONSE 1a (cont.):

recertification is due and are offered the option to recertify via U.S. mail, by telephone (accessing the CARE Recertification IVR system) or on-line.

	2012	2013	2014	Notes
Number of CARE customers Re-certifying on 4-year cycle.	159,969	239,207	286,881	
Percent of CARE customers Re-certifying on 4-year cycle.	43%	59%	64%	
Cost savings per unit (please define) to recertify every 4 instead of every 2 years.	\$0	\$0	\$0	Please see note 1 below
Total cost to recertify customers each year (combine 2-year and 4-yr schedules).	\$479,825	\$555,649	\$563,129	Please see note 2 below
Total cost <i>if all customers had been on a two year cycle.</i>	\$688,484	\$881,321	\$920,982	

Notes:

1. There is no cost variance per unit to recertify every 4 years versus every 2 years.
2. SoCalGas tracks processing costs for both recertification and self-certification combined. Total cost to recertify customers presented here is prorated by recertification and self-certification volumes in the year. The unit cost of each process does not differ significantly.

RESPONSE 1b:

The below table provides SoCalGas' verification request estimates for 2015, 2016, and 2017:

Program Year	Estimated Year End Participation	PEV Rate ¹	Estimated PEV Requests
PY 2015	1,707,088	2.88%	49,192
PY 2016	1,724,159	2.88%	49,684
PY 2017	1,741,401	2.88%	50,181

¹ 2.88% was the PEV rate from Oct 2013 to September 2014.

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RESPONSE 1c:

Attached is the standard verification request letter in English, Spanish Chinese, Korean, and Vietnamese for both individually metered customers, and sub-metered customers. A second variation of the form is the PEV incomplete letter which is sent to customers when they respond to the initial request without providing complete proof of eligibility. A third variation of the form is the Re-enrollment verification request letter, which is sent to customers when they apply for the CARE program, but were PEV terminated less than 24 months due to non-response to a prior PEV request. Proof of eligibility is required for this set of customers to get back on the program.



PEV letters for ORA
data request Qu 1c.z

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QUESTION 2:

Modeling Choices and Outcomes

- a. Are there any aspects of the model (e.g. software, hardware, labor inputs, other practices or operational strategies) that will improve the cost effectiveness of PEV in 2015-2017. Explain and quantify.
- b. After roughly one year of testing your long term probability model, what model parameters have been dropped because they don't seem effective in identifying non-eligible customers, and what parameters have been added since September 2013 (presentation of the long term model)? Show changes 2013-2014 and planned changes for 2015-2017 in the table below.

Added/dropped in this time frame	Added or Planning to Add	Dropped or Planning to Drop	Notes
Nov.2013- Dec.2014			
Jan. 2015- Dec 2017			

RESPONSE 2a:

SoCalGas does not believe there are any aspects of the model that will improve the cost effectiveness of PEV in 2015-2017. The model is cost effective in that it mails a PEV request only to those customers likely to be ineligible for CARE. The customer selection for PEV and mailing of applications is already fully automated in SoCalGas' Customer Information System. Currently, SoCalGas has no plan to change the system process.

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RESPONSE 2b:

Added/dropped in this time frame	Added or Planning to Add	Dropped or Planning to Drop	Notes
Nov.2013- Dec.2014	None	None	Please see note 1 below
Jan. 2015- Dec 2017	Urban/rural factors	None	Please see note 2 below

Notes:

1. Given the goal of targeting ineligible CARE enrollees, it was important for SoCalGas to include as many relevant and significant factors as possible to statistically mimic customer behavior. In addition to the nine factors directed in D.12-08-044, SoCalGas investigated and included customer behavior regarding payments (i.e., payment extensions, overdue notices, and paperless billing; other low income programs, LIHEAP, Women, Infants and Children, Food Stamps, single-family home, fixed income, and qualified for Medi-cal). These not only increase model integrity, but also represent a more well-rounded profile of a CARE customer. The current model in use contains a total of 21 model parameters, all of which are statistically significant; therefore, none have been added or deleted.
2. However, as new factors (such as urban/rural) are introduced to the model, others may become less statistically significant and may warrant being dropped. In fact, it may be true that during 2015-2017, certain factors may become obsolete and will need to be dropped as customer behaviors change.

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QUESTION 3:

Verification – Non Responses

- a. Provide non-response percentages for recertification and PEV (separately) for 2012, 2013, and 2014.
- b. Regarding Table 7, of the SoCalGas CARE application, please explain the column heading: “% Dropped through Random Verification,” i.e. explain what is the population, sample population?
- c. Following (b) above, please express the non-response percentage for each month related to this random sample, and the percent of those dropped who did not respond to verification.
- d. What resources (academic, professional journal, agencies, etc.) has SoCalGas collected and/or used, thus far, to shed light on why customers do not respond to verification requests? Please provide copies with this response.
- e. What changes have been made in the CARE program, since January 2014, to improve the verification and recertification response rate and what have been the results? Can you determine cause and effect?
- f. How will the PEV budget enhancements for 2015-2017 affect the non-response rate? Please estimate the impact (if any) on penetration rates for 2015-2017.
- g. Compare (in table below) the rate of non-response (PEV) between customers who had enrolled via categorical eligibility and those who had enrolled via income declaration (2013 and 2014). Please fill out non-response rate for re-certification, splitting by those that enrolled via these two methods.

2013-2014 responses, divided by categorical eligibility or income enrollment method	Percentage responding to verification requests (standard PEV)	Percentage that didn't respond to verification requests (standard PEV)	Total number of verification requests in 2013 and 2014, as categorized.	2013-2014 Recertification Request response: % attributed to non-response
Categorical elig enrolled (2013 contact)				

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Income Enrolled (2013 contact)				
Categorical elig enrolled (2014 contact)				
Income enrolled (2014 contact)				

- h. Since SoCalGas permits post enrollment verification with proof of categorical eligibility, provide verification cost per customer when categorical eligibility is used and cost when income documentation is used. Explain and quantify.
- i. Within the SoCalGas budget, does verification of a Non-Response customer have a different cost than the verification of a customer who does respond? Please explain and quantify. Indicate costs and what those costs are related to (e.g. multiple direct mailings/postage, customer center contacts), as applicable.

RESPONSE 3a:

In the below table SoCalGas provides non-response percentages for recertification and PEV for 2012 – 2014. Please note that 2014 percentages are based on results from January-October 2014. They do not include requests sent in November and December 2014 because customers have 90 days to respond and the drop off from the program due to non-response has not occurred.

% Customers non-response to Request & PEV		
	Recertification	PEV
2012	43.46%	54.61%
2013	42.01%	50.50%
2014	41.80%	49.96%

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RESPONSE 3b:

Prior to the implementation of the Interim and Long Term Models, SoCalGas' Customer Information System randomly selected customers who were newly enrolled or newly recertified. The randomly selected customers were then tested through a vintage probability model which determined the likelihood of CARE eligibility. A PEV application was mailed to all customers who did not pass the model. This sample population falls into the category of "% Dropped through Random Verification".

Starting March 2013, SoCalGas changed its PEV selection. All newly enrolled and recertified CARE customers are tested through its approved PEV probability model, and only those who are found to be most-likely not eligible are mailed a verification request letter.

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RESPONSE 3c:

The following table provides information for the percentage of CARE customers dropped through verification.

Month/ Year	Selection Method²	PEV Mailed	Terminated due to non-response	% dropped due to non- response
Jan-12	Random/Target	4,630	2,386	51.53%
Feb-12	Random/Target	4,882	2,457	50.33%
Mar-12	Random/Target	5,923	3,043	51.38%
Apr-12	Random/Target	412	34	8.25%
May-12	Random/Target	451	34	7.54%
Jun-12	Random/Target	4,126	2,589	62.75%
Jul-12	Random/Target	4,517	2,479	54.88%
Aug-12	Random/Target	5,984	3,414	57.05%
Sep-12	Random/Target	4,548	2,659	58.47%
Oct-12	Random/Target	7,378	4,585	62.14%
Nov-12	Random/Target	4,710	2,913	61.85%
Dec-12	Random/Target	4,586	1,886	41.13%
2012 Total		52,147	28,479	54.61%
Jan-13	Random/Target	5,282	3,108	58.84%
Feb-13	Random/Target	5,359	2,807	52.38%
Mar-13	Random/Target	6,207	3,167	51.02%
Apr-13	Random/Target	6,973	3,860	55.36%
May-13	Target	8,847	5,475	61.89%
Jun-13	Target	885	220	24.86%
Jul-13	Target	5,258	3,186	60.59%
Aug-13	Target	5,501	3,199	58.15%
Sep-13	Target	3,900	2,174	55.74%
Oct-13	Target	1,283	507	39.52%
Nov-13	Target	3,958	2,180	55.08%
Dec-13	Target	6,060	3,356	55.38%
2013 Total		59,513	33,239	55.85%
Jan-14	Target	3,659	1,696	46.35%
Feb-14	Target	4,858	2,427	49.96%
Mar-14	Target	4,323	2,240	51.82%
Apr-14	Target	3,792	2,117	55.83%
May-14	Target	2,517	1,273	50.58%

² Methods are described in the response to question 3.b

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Jun-14	Target	3,519	1,774	50.41%
Jul-14	Target	4,599	2,608	56.71%
Aug-14	Target	3,483	1,755	50.39%
Sep-14	Target	3,937	2,025	51.44%
Oct-14	Target	4,437	1,633	36.80%
Nov-14	Target	7,772	8	0.10%
Dec-14	Target	4,863	6	0.12%
2014 Total		51,759	19,562	37.79%

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RESPONSE 3d:

SoCalGas conducted a PEV study (attached below) to attain customer feedback regarding the PEV process in the hopes that the information obtained would aid in increasing the PEV response rate.



Key Findings of the PEV Study:

- 1) Overall satisfaction with the CARE program is high.
- 2) Few had negative feelings toward the PEV request overall.
- 3) Three out of four customers were aware of the PEV policy and nearly half remember receiving the PEV request:
 - A third of those recall receiving but did not respond to the PEV request (non-compliers).
 - Most read or at least glanced at the material then set it aside to read later.
 - Three out of four found the instructions and application easy to understand.
 - The consequence of losing the CARE discount for failing to comply is clear.

Results of SoCalGas' PEV Study

Income Verification Process	41%
Documentation	26%
Do not have all the documents	12%
Could/would not be able to get income documentation	7%
Confusion/lack of Information	5%
Personal/privacy concerns	1%
Qualification	20%
Do not think household qualifies	16%
Forgot/Forget to Complete	18%
No Time	17%
Don't Know/No Answer	4%

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RESPONSE 3e:

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

Additionally, as of September 2014, a second Recertification application is mailed to customers who do not respond to the first request within 45 days of the first request. SoCalGas attributes this mailing to a 16 percent increase in the recertification response-rate of its customers.

Encouraged by the positive results of 2nd recertification notice, SoCalGas is in the process of implementing a 2nd PEV notification to customers who have not responded to the first.

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RESPONSE 3f:

Based on the results of the PEV study, SoCalGas plans to make improvements to the PEV process overall to increase the response rate of its customers. However, based on the probability model and the selection process of mailing PEV requests to customers who may not be eligible, it is possible that customers' non-response may be due to their inability to meet the qualification criteria. Nevertheless, SoCalGas plans to improve the layout of the PEV form to ease the perceived burden of completing the PEV process. The visual appeal and tone of the application will be enhanced to assist in prompting the customer to complete the process in a timely manner rather than set it aside to view later. Detailed information will be available on the website including a Frequently Asked Questions (FAQ) section to answer questions, clear up any misconceptions, and to ease customers' minds regarding the security of their documentation and their freedom to redact numbers such as social security or bank accounts. An email address will be included in the PEV instructions so that customers will also be able to submit copies of requested information via email. A 2nd PEV application will be mailed to customers who have not responded to the first mailing within 45 days. Although SoCalGas is hopeful that these additional enhancements will aid in retaining CARE customers, the impact to penetration rates for 2015-2017 cannot be easily estimated.

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RESPONSE 3g:

The table below provides a comparison of SoCalGas customers who had enrolled via categorical eligibility and those who had enrolled via income declaration from 2013 - 2014. Please note that 2014 percentages are based on results from January 1st, 2014 to November 19th, 2014. Results for the requests after November 19th, 2014 are not available since customers have 90 days to respond to the request.

2013-2014 responses, divided by categorical eligibility or income enrollment method	Percentage responding to verification requests (standard PEV)	Percentage that didn't respond to verification requests (standard PEV)	Total number of verification requests in 2013 and 2014, as categorized.	2013-2014 Recertification Request response: % attributed to non-response
Categorical elig enrolled (2013 contact)	50%	50%	22,256	33.3%
Income Enrolled (2013 contact)	48%	52%	22,359	48.6%
Categorical elig enrolled (2014 contact) ¹	55%	45%	21,453	28.3%
Income enrolled (2014 contact) ¹	49%	51%	20,141	49.3%

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RESPONSE 3h:

To verify CARE eligibility, customers may submit proof of participation in one assistance program for the entire household. This is sufficient and no other information is requested from the customer. This streamlined process is in contrast to the customer who submits proof of income for one adult. SoCalGas believes in due diligence and will request income documentation for the additional adults in the household. It is estimated that verification with proof of income documents takes 153% more time than verification with categorical documentation.

SoCalGas does not track the verification cost per customer by type of proof submitted. The unit costs below are SoCalGas' best attempt to estimate the verification cost per customer. They are extrapolated from 2013 recorded total PEV cost, income documentation and categorical documentation distributions, and a high-level time study.

Verification	Categorical documentation	Income documentation	All		Note
Type of Proof	44%	56%	100%	A	
Weights	1.00	153%		B	it take 53% more time to process income documentation
No. of Verifications	15,920	20,261	36,181	C	60% customers submitted proof of participation in one assistance program for the entire household in 2013.
Weighted No. of Verifications	15,920	31,067	46,987	D	B*C
Cost %	34%	66%	100%	E	% distribution of D
Total Cost	\$107,991	\$210,746	\$318,737	F	E*total cost in 2013
Unit Cost	\$6.78	\$10.40	\$8.81		F/C

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RESPONSE 3i:

From a processing perspective, within the SoCalGas budget, verification of a Non-Response customer has no processing cost. Processing costs would be accrued for verification of the customer who returns the application and proof of income or proof of participation in an assistance program. Once a customer drops off from the CARE rate by being non-responsive, SoCalGas has begun to send a direct mail application to the customer (and an email if the customer's email address is on file). The customer is being targeted for enrollment as part of any CARE campaigns to enroll new CARE customers.

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QUESTION 4:

Outreach strategies

- a. Describe which organizational partners (e.g., CBOs) are the most cost effective for outreach/enrollment purposes, and if SoCalGas plans to expand these partnerships. Explain which less cost-effective partnerships will be retained and/or pursued, and why.
- b. Explain the cost of partnering with a government agency, such as a county social services or Veterans Administration, and how you will expand these partnerships, if at all. Please use an existing partner as an example.
 - a. Indicate how SoCalGas defines (including how this is calculated) cost-effectiveness with respect to outreach methods/activities.
 - b. How could leveraging with other agencies or utilities impact the cost of outreach methods and increasing penetration? Use examples of partnerships with Lifeline, LADWP, CBOs, County Social Service agencies and compare 2016 unit cost with 2014.
 - c. Please give an example of how you will improve cost effectiveness for one or more outreach methods during 2015-2017.
 - d. How many times was direct mail used in each of years 2012, 2013, 2014? How many are planned for 2015, 2016, 2017? How do you choose that frequency?
 - e. How many times were CARE enrollment inserts distributed in each of years 2012, 2013, 2014? Please provide a copy of each insert that was distributed.
 - f. How will SoCalGas improve the cost effectiveness of these mail outreach methods in 2015-2017 (if at all) and improve the enrollment/retention outcomes?
 - g. Is there any possible expansion of data exchange to increase cost effective penetration during 2015-2017? Explain. What are the different eligibility protocols for SCE?

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RESPONSE 4a:

CBOs are an integral part of the outreach process, but SoCalGas does not evaluate their effectiveness based on enrollments. Channels such as direct mail or door-to-door canvassing lend themselves to traditional calculation (discussed below), but CBOs go beyond enrollments *per se* and help establish grass roots awareness with hard-to-reach communities. Hard to reach communities have been defined as persons with disabilities or Limited-English-Proficiency (LEP); customers who are seniors or who live in rural communities. Therefore, SoCalGas uses the hard-to-reach criteria as a starting point for engaging with a CBO. In some cases, an organization may serve more than one community, such as Campesina Radio, which is a Spanish-language station that reaches rural customers and farmworkers.

Because CBOs have a close relationship with their community and because SoCalGas maintains a close relationship with the CBOs, deeper levels of awareness are possible. For example, SoCalGas has observed the challenge of customers who are on the CARE program and fail to recertify and has begun to discuss this challenge with CBOs. This has become a key message that these organizations provide to customers. It does not show up on a list of monthly enrollments, but over time, SoCalGas expects the community to become more and more attuned to the importance of recertifying eligibility.

CBOs also provide SoCalGas with valuable feedback on challenges facing SoCalGas customers. For example, some of the first information that SoCalGas received on CARE customers being signed up by CAT suppliers came from a CBO that informed SoCalGas directly that its community members were confused by the solicitation. In addition, SoCalGas learned valuable feedback regarding the literacy challenges of many of its customers through feedback from CBOs.

Several CBOs are also working with SoCalGas on a long-term tactic to “bridge the digital divide.” As SoCalGas has highlighted in its monthly reports, many of its collaborations involve working with organizations that promote digital literacy and/or

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RESPONSE 4a (cont.):

low-cost purchase of equipment. As part of these small to medium-size workshops, the community learns about how to use the computer to conduct important business transactions that include learning about and signing up for low-income programs at the SoCalGas website. SoCalGas has already sponsored or scheduled workshops that reach out to central city immigrants, libraries in low-income communities, parent-teacher events, and farmworker housing. As SoCalGas works with other agencies that are trying to bridge the digital divide, lower cost transaction channels, such as web and email-prompted web enrollment, will increase. By year-end 2014, SoCalGas processed more than 69,000 Web applications. SoCalGas expects this number to increase over time, but remains cautious on the speed of the increase.

Thus, SoCalGas does not plan to reduce its reliance on CBOs. Rather SoCalGas plans to increase the number. SoCalGas has made good progress in LA County and has initiated grass-roots relationships in Ventura, Santa Barbara, Orange, Kern, Tulare, and Riverside counties, SoCalGas believes these relationships will increase in number and depth.

RESPONSE 4b:

SoCalGas currently has limited partnerships with government agencies. SoCalGas, however, is open to such partnerships. In 2014, SoCalGas began working closely with the Department of Public Social Services (DPSS) to discuss shared outreach to participants of the CalFresh program. The DPSS administers the CalFresh program in Los County and CalFresh is one of the programs for Categorical Eligibility. For example, during summer of 2014 SoCalGas hosted a meeting of more than 100 outreach specialists from Los Angeles County to compare notes on barriers to enrollment with hard-to-reach communities in LA County. Such efforts will continue. The cost of such partnerships is modest because the primary focus of such partnerships is to share ideas and coordinate efforts.

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Response to 4b.a:

SoCalGas does not evaluate cost effectiveness with a one-size-fits-all approach. Some outreach methods lend themselves to a Return-on-Investment (ROI) calculation, such as direct mail and door-to-door canvassing. For the last several years one of the largest outreach expenses for SoCalGas has been direct mail campaigns – postage representing the lion’s share of that expense. SoCalGas includes the cost of paper and postage; divided by returns and/or actual enrollments. In point of fact, postage is the true driver of the cost. Nevertheless, direct mail generates significant enrollments.

Another significant area of effective outreach is the use of bilingual canvassers. Traditionally, these canvassers have been paid based on successful enrollment. The cost per enrollment is the agreed-upon compensation for enrollment. Although this relationship has been successful, SoCalGas’ business practices have identified this relationship as being due for a Request for Proposal process. At the present time SoCalGas plans to continue with this channel, but the marketplace may dictate a change in the pricing. (SoCalGas noted this in its application.)

Response to 4b.b:

SoCalGas did not conduct specific outreach campaigns with Los Angeles Department of Water & Power (LADWP) or Lifeline. However, SoCalGas participated in community events with LADWP and Lifeline where customers were exposed to multiple programs. As stated above, SoCalGas’ work with CBOs, while an integral part of our overall marketing budget, is focused on awareness. SoCalGas develops relationships with CBOs to increase awareness of our program while unit costs are captured through our CARE capitation program which provides CBOs up to \$20 per qualified enrollment. Even though there may be savings in outreach costs, SoCalGas suggests that the emphasis be on the customer experiences. When a vulnerable customer has an opportunity to learn about varied, but related programs in the same setting (for example CalFresh and CARE or Medi-Cal and CARE), there is the potential for the customer to encounter credible and reinforcing information.

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(DATA REQUEST ORA-SCG-006)**

Response to 4b.c:

In January 2015 SoCalGas began to launch multiple, discrete campaigns, for example, new customers, existing customers, customers who were on the program and failed to recertify. Over time, SoCalGas plans to track the comparative effectiveness of these campaigns. In addition, SoCalGas plans to experiment with different messaging approaches, for example letters that are less text heavy.

The targeting of eligible customers is a work in progress. More than 87,000 direct mail applications were returned in 2014. During 2015 SoCalGas will be focusing on several regular direct mail campaigns: new customers, existing customers with a probability of being eligible for the CARE program, and customers that have failed to recertify for the CARE program. Each of these campaigns represents an opportunity to reach a particular population. For example, the campaigns to new customers represent an opportunity to reach customers while they are still fresh with their relationship with the company. In addition, SoCalGas is aware and will be exploring communications that are less text heavy. Finally, SoCalGas has begun to send an additional letter to customers whose eligibility in the CARE program is about to expire, and if customers fail to renew their eligibility, SoCalGas has begun to send a direct mail application (and an email if the address is on file) to the customer.

SoCalGas's deployment of phone enrollment with Customer Service Representatives will allow for a reduction – but not an elimination – of direct mail costs. Even though the direct mail channel generates significant enrollments, some of SoCalGas's CBOs have raised the challenge that literacy presents in understanding and enrolling in the CARE program. The ability of customers to enroll over the phone could potentially mitigate some of these challenges, and, in the process, the postage/paper costs of direct mail applications will be reduced.

**SOUTHERN CALIFORNIA GAS COMPANY
ENERGY EFFICIENCY
(DATA REQUEST ORA-SCG-006)**

Response to 4b.d:

SoCalGas deploys direct mail campaigns throughout the year. Many of these campaigns are triggered by some type of event such as a new customer or a customer but who failed to recertify. SoCalGas also targets existing customers that may have a probability of being eligible for the CARE program. These campaigns occurred monthly, from 2012-2014, and SoCalGas plans to maintain such frequency from 2015-2017 based on the above triggered points. There is one noteworthy qualification. During the time of the annual guideline changes (June), SoCalGas will suspend campaigns because the applications are hard-coded with the eligibility guidelines, and customers should not receive direct mail applications with stale information.

The focus of the bill insert channel is to send an annual bill insert to all residential customers that are not on the CARE program. This bill insert coincides with the updated eligibility guidelines that occur in June. Therefore, this bill insert is mailed annually in June or July.

In addition, SoCalGas mails out an annual bill insert that targets Non-Profit Group Living Facilities. SoCalGas mails this bill insert during the early fall. In 2015 SoCalGas plans to send only one residential bill insert and one commercial bill insert.

Attached are the inserts for 2012, 2013 and 2014:

					
2012_Insert_9566_S CG_CARE_Bill-InsertC	2012_NonProfitGrou pLiving.pdf	CARE_NPGL Bill Insert_2013.pdf	CARE_Residential Bill Insert_2013.pdf	CARE_NPGL Bill Insert_2014.pdf	CARE_Residential Bill Insert_2014.pdf

**SOUTHERN CALIFORNIA GAS COMPANY
ENERGY EFFICIENCY
(DATA REQUEST ORA-SCG-006)**

Response to 4b.e:

The direct mail campaigns were discussed above. SoCalGas has not planned revisions of the bill insert process.

Response to 4b.f:

SoCalGas has no inherent objection to expanding the use of data exchange, but there are two considerations: Southern California Edison is the largest Investor Owned Utility with overlapping service territory, and SoCalGas has an existing data exchange relationship. LADWP shares a significant overlapping territory with SoCalGas, but the two agencies have different eligibility protocols.

**SOUTHERN CALIFORNIA GAS COMPANY
ENERGY EFFICIENCY
(DATA REQUEST ORA-SCG-006)**

QUESTION 5:

Budget (provide all tables as excel spreadsheets)

- a. Please explain why the budgets proposed for 2015, 2016, and 2017 Outreach and Processing/Certification/Recertification are so dramatically different from that authorized in 2014. Define shifts in emphasis, any expenses that are not needed and **why** these are not needed to cost effectively increase penetration rate to the 90% goal.
- b. What was the total administrative budget spent for 2014? Additionally, please supply an updated Table B1 with actuals for 2014.

RESPONSE 5a:

SoCalGas plans to continue all current practices and procedures in processing for new enrollments and recertification and therefore anticipates similar costs as in 2014 for the current activities.

As stated in the Prepared Direct Testimony of Carmen Rudshagen and Hugh Yao for SoCalGas' Low-Income Application for program year 2015-2017 (CAR-71&92), the significant budget increase for Process/Certification/Recertification cost category from 2014 actual is for new CSR CARE enrollments. SoCalGas is estimating 17 Full-time Employees based on a 10-week pilot and time study to offer CARE enrollments to 1.3 million customers during new service establishment requests and payment extensions annually. CSR CARE enrollments will begin in 2016.

RESPONSE 5b:

The total SoCalGas administrative budget for 2014 was \$8,021,603.

Attached please find an updated SoCalGas CARE Table B-1.



Question 5b CARE
Table B1 (Updated w-



**IMMEDIATE REPLY
NEEDED**

A Sempra Energy utility®

Dear Customer:

You are currently receiving a 20% CARE discount on your monthly gas bill through Southern California Gas Company (SoCalGas®)'s California Alternate Rates for Energy (CARE) program. Your household has been randomly selected for verification of eligibility. To continue receiving this discount, please return the completed and signed form including required document(s) in the envelope provided, or by fax, within 90 days. If you do not reply or are found ineligible, you may receive corrected billings.

Required Documents: You only need to provide copies of document(s) from either list **1 OR 2** (not both).

List 1) If you or another person in your household receives public assistance, **please send documentation proving participation** in any of the following programs:

Medicaid, Medi-Cal, Medi-Cal for Families A&B (Monthly Premium Statement), Women, Infants, & Children (WIC), CalWORKs (TANF), Tribal TANF, Head Start Income Eligible - Tribal Only, Bureau of Indian Affairs General Assistance, CalFresh (Food Stamps), National School Lunch Program (NSLP), Low Income Home Energy Assistance Program (LIHEAP), Supplemental Security Income (SSI)

OR

List 2) If no one in your household participates in any of the programs mentioned above, **please send copies of income documents for every household member receiving income or aid.** The chart below lists income sources and required documents:

If you receive:	Acceptable Documents
Wages, Salary, Tips, Commissions	Two most recent consecutive Pay Stubs, or W2, or IRS 1040 form
Social Security, SSI, SSDI, Pensions, Disability Payments, Workers Compensation, Unemployment Benefits	Statements of Benefits, or Copy of the Check, or Bank Statements showing the deposits, or IRS Form 1040, or IRS Form 1099
Profit from Self-Employment	IRS Form 1040, plus Schedule C
Rental Income, Royalty Income	IRS Form 1040, plus Schedule E for rental income
Interest or Dividends from Savings Accounts, Retirement Accounts, Stocks, Bonds	IRS Form 1040, or IRS Form 1099(s).
Insurance, Legal settlements	Settlement documents
Child and/or Spousal Support	Court Documents, or Copy of the Check
School Grants, Scholarships, or Other Aid	Award Letters, or two most recent consecutive Pay Stubs, or Copy of the Check
None of the Sources Above	A statement explaining the sources of income used to support your household

FOR INFORMATION ON CARE, CALL SOCALGAS AT:

English:	1-800-427-2200	Mandarin:	1-800-427-1429	Spanish:	1-800-342-4545
Korean:	1-800-427-0471	Cantonese:	1-800-427-1420	Vietnamese:	1-800-427-0478

Hearing Impaired (TDD/TTY): 1-800-252-0259 (available in English and Spanish only)

FAX: (213) 244-4665



CARE 20% Rate Discount Verification Form

Form 6675-E EN (06/14)

Please use DARK ink and print clearly to ensure proper processing

Correct way to mark circles: ●

CARE PROGRAM ML GT19A1
PO BOX 3249
LOS ANGELES, CA 90051-1249
FAX: (213) 244-4665



Customer Name
(as it appears on your bill):

Home Address
(street, city, zip):

Account Number:

Phone Number: () - -

E-mail Address: _____

I no longer qualify or wish to participate in CARE. Please remove my account from the CARE program.
← If you filled in this circle, please go directly to #4, sign at the bottom, and mail this form in the postage paid envelope provided within 90 days.

(1) Total number of persons in your household: 1 2 3 4 5 6 If more than 6:

(2) Please list names of everyone in your household (include you, additional adults, and children) and fill in the circle (●) to indicate whether each person is an adult or child.

Name		Adult/Child		Name		Adult/Child	
1.		<input type="radio"/>	<input type="radio"/>	6.		<input type="radio"/>	<input type="radio"/>
2.		<input type="radio"/>	<input type="radio"/>	7.		<input type="radio"/>	<input type="radio"/>
3.		<input type="radio"/>	<input type="radio"/>	8.		<input type="radio"/>	<input type="radio"/>
4.		<input type="radio"/>	<input type="radio"/>	9.		<input type="radio"/>	<input type="radio"/>
5.		<input type="radio"/>	<input type="radio"/>	10.		<input type="radio"/>	<input type="radio"/>

Total Annual Household Income: If your household does not participate in any of the assistance programs from List 1, please fill in the circle (●) of your household's income range per year before deductions.

\$0 - \$31,460 \$31,461 - \$39,580 \$39,581 - \$47,700 \$47,701 - \$55,820 \$55,821 - \$63,940

If more than \$63,940, enter amount here: \$, .00 per year

(3) ***YOU MUST PROVIDE PROOF THAT YOU QUALIFY FOR THIS PROGRAM***
I have **included** copies of documentation proving participation in an assistance program (list 1) **OR** income document(s) for every household member receiving income/aid (list 2). Please fill in a circle (●).
 Yes No

(4) **DECLARATION:** Please read and sign below.
I state that the information and documents I have provided in this application are true and correct. I agree to inform SoCalGas if I no longer qualify to receive the discount. I understand that if I receive the discount without qualifying for it, I may be required to pay back the discount I received. I understand that SoCalGas can share my information with other utilities or agents to enroll me in their assistance programs.

Signature: **X** _____ Date: / /

FOR SOCALGAS USE ONLY:

1 = CE 2 = INCOME 3 = BOTH
BLANK = INCOMPLETE

INC: \$ _____

HH: _____

INITIALS: _____



**Pacific Gas and
Electric Company®**

Dear Customer:

Your household has been selected for income verification by the California Alternate Rates for Energy (CARE) program. To continue receiving the CARE discount, you must:

- Complete the attached "Post Enrollment Verification Form"; and
- Provide copies of all income documents that apply to each member of your household.

Failure to provide required documents will result in removal of the CARE discount from your account.

If you have any questions, please call the CARE program at 1-866-743-5832 or e-mail CAREandFERA@pge.com.

Sincerely,

CARE Team

CARE Program

如需要這份中文信, 請聯絡CARE計劃 1-866-743-5832

Xin vui lòng liên lạc chương trình CARE ở số 1-866-743-5832 để yêu cầu lá thư tiếng Việt

CARE_E_PEV Letter



Estimado(a) Cliente:

Su hogar ha sido seleccionado para verificar sus ingresos a través del programa California Alternate Rates for Energy (CARE). Para continuar recibiendo el descuento CARE usted deberá:

- Llene el formulario adjunto "Post Enrollment Verification Form"; y
- Envíe todas las pruebas de ingresos de cada uno de los miembros de su hogar.

Si los documentos no son recibidos, su descuento CARE será cancelado de su cuenta.

Si tiene cualquier pregunta, por favor llame al Programa CARE al 1-866-743-5832, o envíenos una comunicación electrónica a CAREandFERA@pge.com.

Atentamente,

CARE Team

Programa CARE

CARE_S_PEV Letter



CARE Program
Post Enrollment Verification Request Form

September 30, 2014

Mailing Address
CARE Program
P.O. Box 7979
San Francisco, CA 94120-7979

1.866.743.5832
Fax 1.415.973.6419 or 1.877.302.7563

«NAME»
 «NAME2»
 «MLADDR»
 «MLADDR2»
 «MLCITY», «MLSTATE» «MLZIP»

**URGENT -
 Response required by
 November 22, 2014**

Re: Account Number «ACCT_ID»

Instructions:

1. Complete this form
2. Provide copies of income document(s) for every household member receiving income/aid.
3. Mail the completed form and copies of income document(s) to CARE program at P.O. Box. 7979, San Francisco, CA 94120-7979 Or, fax to 415-973-6419 or 1-877-302-7563

Name of Each Household Member (including you)	Adult or Child	Received Income	Source(s) of Income (e.g.: salary, pension, etc.)	Annual Income Before Taxes
		Yes <input type="checkbox"/> No <input type="checkbox"/>		\$
		Yes <input type="checkbox"/> No <input type="checkbox"/>		\$
		Yes <input type="checkbox"/> No <input type="checkbox"/>		\$
		Yes <input type="checkbox"/> No <input type="checkbox"/>		\$
		Yes <input type="checkbox"/> No <input type="checkbox"/>		\$
		Yes <input type="checkbox"/> No <input type="checkbox"/>		\$
		Yes <input type="checkbox"/> No <input type="checkbox"/>		\$
		Yes <input type="checkbox"/> No <input type="checkbox"/>		\$

Number of people living in your household: Adults _____ Children (under 18) _____	Total	\$
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Declaration: I state that the information I have provided is true and correct. I agree to provide proof of income if asked. I agree to inform Pacific Gas and Electric Company (PG&E) if I no longer qualify to receive the discount. I understand that if I receive the discount without qualifying for it, I may be required to pay back the discount I received. I understand that PG&E can share my information with other utilities or their agents to enroll me in their assistance programs.

Signature: _____ **Date:** _____

Check only if you **no longer** qualify or **do not** want to participate in the CARE program, and sign the declaration.

REQUIRED INCOME DOCUMENT GUIDE

The chart below contains examples of required income documents. You must send documentation for **ALL** types of income that apply to your household. You can also send (in place of the documents below) a complete copy of your latest federal income tax return, as long as it includes all sources of your household income.

Note: For your protection, please black out Social Security and/or bank account numbers on all copies.

If you participate or receive income from:	You can send us a copy of:
Wages, Salaries and Commissions	Two Consecutive Check Stubs
Pensions, Social Security, SSP, SSDI, Disability Payments, Workers Compensation, Unemployment Benefits, VA Benefits, Foster Care Payments	Award Letters, Check Stubs, Bank Statements (to show direct deposit)
Medicaid/Medi-Cal, Supplemental Security Income (SSI), CalFresh/SNAP (Food Stamps), LIHEAP, WIC, Healthy Families A & B, CalWORKs (TANF), Tribal TANF, National School Lunch Program (NSLP), Bureau of Indian Affairs General Assistance, Head Start Income Eligible (Tribal Only)	Award Letters, letter of participation in the program
School Grants, Scholarships, or Other Aid	Award Letters, Statements
Insurance and/or Legal Settlements	Settlement document
Child and/or Spousal Support	Court Documents, Letters, Check Stubs
Farm Income	First page of IRS Form 1040
Interest and/or Dividends from: Savings, Stocks, Bonds, or Mutual Funds	Investment account statement(s), bank statement, and/or first page of IRS Form 1040
401K or IRA Withdrawals or Annuities	Investment account statement(s) and/or bank statement
Capital Gains	Investment account statement(s) and/or first page of IRS Form 1040
Rental and/or Royalty Income	First page of IRS Form 1040
Profit from Self-Employment	First page of IRS Form 1040 AND 1040 Schedule C
Gambling/Lottery Winnings	Determined on case-by-case basis
Union Strike Fund Benefits	Benefit Payment Stubs
Cash Income (when you have not filed Federal or State taxes)	Provide a signed letter detailing: the type of work, estimated monthly amount of cash payment, and employer name and phone number
Monetary Gifts, none of the examples above apply, or If you do not receive any income	Provide a signed letter explaining the current source(s) of income used to support your

[[

	household
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REPLY NEEDED
Verification of Household
Income Required to Continue
Discounted Electricity Rate

@@TODAYS_DATE

@@CUSTNAME
@@STREETADDR
@@MAILINGCITY, @@STATECODE, @@ZIPCODE

@@ACCT_NUM

Dear @@CUSTNAME,

We hope you've been enjoying your monthly savings through your discounted rate program.

In order to continue receiving a discount on your monthly electric bill, we will need you to verify your eligibility for SCE's income-qualifying discount rate program by completing the following steps:

1. Fill out the enclosed *VERIFICATION of ELIGIBILITY for CARE/FERA RATE* form
2. When completing the form, please note that Section 1 is to be completed only if you participate in one or more of the Public Assistance Programs designated.
3. Please be sure to complete Section 2. This section is required regardless of participation in the Public Assistance Programs:
 - The total number of people in your household.
 - Gross annual household income – gross income is all income from all sources for every member of the household receiving income (taxable and non-taxable).
4. Proof of all gross household income is required if you do not participate in one of the Public Assistance Programs designated in Section 1.
 - See the attached list of example documents that you may use to verify income. Photocopies of your documents are acceptable. **Please do not send the original documents since we will not be able to return them to you.**
5. Send the verification form and all documentation to the address below within 45 days of the date of this letter:

Southern California Edison
CARE / FERA
P.O. Box 9527
Azusa, CA 91702-9932

If we do not hear from you within 45 days of the date of this letter, you will no longer receive a discounted rate on your SCE electric bill. **If you do not qualify for either program, please advise us by calling us toll free at (800) 798-5723.**

If you have any questions, please call us at the number above, Monday through Friday, from 8:00 a.m. and 5:00 p.m.

Sincerely,
Southern California Edison

Enclosure



REPLY NEEDED
Verification of Household
Income Required to Continue
Discounted Electricity Rate

@@ACCT_NUM

VERIFICATION OF ELIGIBILITY FOR CARE / FERA RATE

SECTION 1: PUBLIC ASSISTANCE PROGRAM ELIGIBILITY (Please check all programs that apply to you)

- Medi-Cal/ Medicaid, WIC, National School Lunch Program, SSI, LIHEAP, Bureau of Indian Affairs General Assistance, CalWorks (TANF)/ Tribal TANF, Medi-Cal for Families (Healthy Families A&B), Head Start Income Eligible (Tribal Only), CalFresh/SNAP (Food Stamps)

(If you checked any of the programs above, please provide a copy documenting proof of current program participation and GO to Section 2)

SECTION 2: HOUSEHOLD AND INCOME INFORMATION

NO. OF PEOPLE IN THE HOUSEHOLD: Adults _____ Children _____ (UNDER AGE 18)

GROSS ANNUAL HOUSEHOLD INCOME: \$ _____

(If you selected a program(s) in Section 1 & completed Section 2, SKIP Section 3 and GO to Customer Signature. If no program selected in Section 1, GO to Section 3)

SECTION 3: GROSS ANNUAL HOUSEHOLD INCOME INFORMATION

Please send ALL of the following documents that apply to your household to prove eligibility for the CARE rate. YOU MUST SHOW GROSS ANNUAL HOUSEHOLD INCOME.

- MOST RECENT FEDERAL INCOME TAX RETURN: Most recent individual and/or business return, including all schedules. If a Federal tax return is not filed, please send a confirmation letter from the IRS
EMPLOYMENT: Last three (3) consecutive pay stubs or last pay stub showing year-to-date gross annual income from each employer
UNEMPLOYMENT: Statement of Benefits from the State Employment Development Department
SOCIAL SECURITY: Copy of the Statement of Benefits for the current year or copy of Direct Deposit notice
SUPPLEMENTAL SECURITY INCOME (SSI): Copy of the Statement of Benefits for current year
RETIREMENT INCOME (PENSION): Copy of Form 1099, copies of last three (3) pay stubs or last pay stub showing year-to-date gross annual income
DISABILITY INCOME: Copy of Statement of Benefits for current year
ALIMONY/ CHILD SUPPORT: Copy of court documents showing the amount given or loaned
FAMILY SUPPORT: Letter from person providing support stating amount given or loaned
INTEREST/DIVIDENDS (TAXABLE AND NON-TAXABLE): Copies of 1099 forms
SCHOOL GRANTS/SCHOOL RECORD/BIRTH CERTIFICATE: Showing current address of children living in home, or copies of documents showing amount of grant
If making a statement of no income, please provide a notarized statement of how bills are paid.

I certify the attached documents are true and accurate copies.

Signature

Date

Landline Cell Phone Telephone #: [] [] [] - [] [] [] - [] [] [] []

By checking this box, I confirm the information provided is accurate, and agree to receive calls at the above number, through an automatic-dialing announcing device (ATDS), or a prerecorded message from, or on behalf of, Southern California Edison for rebates, savings, or other low-income qualified program information. I understand that consent to receiving these calls is not required to enroll in this income-qualified program and that message and data rates may apply.

RETURN THIS FORM AND COPIES OF DOCUMENTS TO:

Southern California Edison, CARE / FERA Program
P.O. Box 9527
Azusa, CA 91702-9932