



Broadening Weatherization Programs and Partnerships



National Energy and Utility Affordability Conference

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About SoCalGas & SDG&E



SoCalGas:

20.5 million consumers

5.7 million meters

20,000 square miles

LIEE Eligible Customers: 1.6 MM

25% in 2009-2011: 400K

100% by 2020

SDG&E:

3.4 million consumers

1.4 million electric meters

0.8 million natural gas meters

4,100 square miles

LIEE Eligible Customers: 220K

30% in 2009-2011: 61K

100% by 2020





Value Proposition

What does Customer Assistance do?

Customer Assistance is designed to help lessen the burden of gas & electric costs to two types of households:

1. Those under financial constraints*
2. Those using energy to run life-support equipment or treat medical conditions*

* Program eligibility requirements apply



Programs & Services:

What does Customer Assistance offer?

The utilities offer a number of programs and services that assist customers, including CARE, FERA, LIEE, Medical Baseline, Neighbor-to-Neighbor, Gas Assistance Fund, payment plans, third party notification, notifications for temperature sensitive customers, appliance marking for visually impaired and more. Customer Assistance manages all of these programs except for payment plans, which are handled by the credit and collections department.

- ▶ **CARE and LIEE** are the focus since they are tied to specific CPUC goals.
- ▶ **Medical Baseline** has a renewed focus due to ties to disabled community.

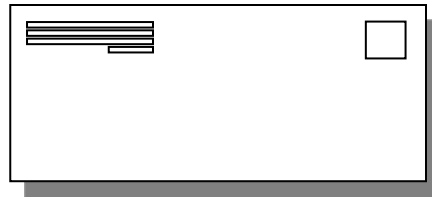
About SoCalGas & SDG&E



CARE

California Alternate Rates for Energy

A statewide program that offers households an opportunity to receive a **20% discount** on their monthly bill.



About SoCalGas & SDG&E



LIEE

Low-Income Energy Efficiency

Offers households an opportunity to receive home repairs and appliance/lighting replacements that improve the comfort and security of their apartment, condo mobile home or house.

- ▶ Available whether customers rent or own their place

Here's what we can do for them:

Replace or fix...	their refrigerators, clothes washers, air conditioners, furnaces, microwaves and lighting
Weather proof their place...	with attic insulation, door/window weather stripping and door/window replacement or repairs to seal their place from heat and cold
Reduce water bills...	by putting in low-flow showerheads, shower control valves and faucet aerators

About SoCalGas & SDG&E



CARE and LIEE eligibility

Households qualify if their **income** is below a certain level. Levels increase as household size increases. For example, a household of 1 or 2 must make \$31,300 or less. Add \$7,600 for each additional person living in the household. Income levels are subject to change each year on June 1.



Households can automatically enroll (without proof of income) if they are already participating in any of the following **10 public assistance programs**:

- Medicaid/Medi-Cal
- Healthy Families A&B
- Food Stamps
- Head Start (Tribal Only)
- Bureau of Indian Affairs
- WIC
- National School Lunch Program
- LIHEAP
- Supplemental Security Income

General Assistance

CPUC Directives for PY2009 – 2011

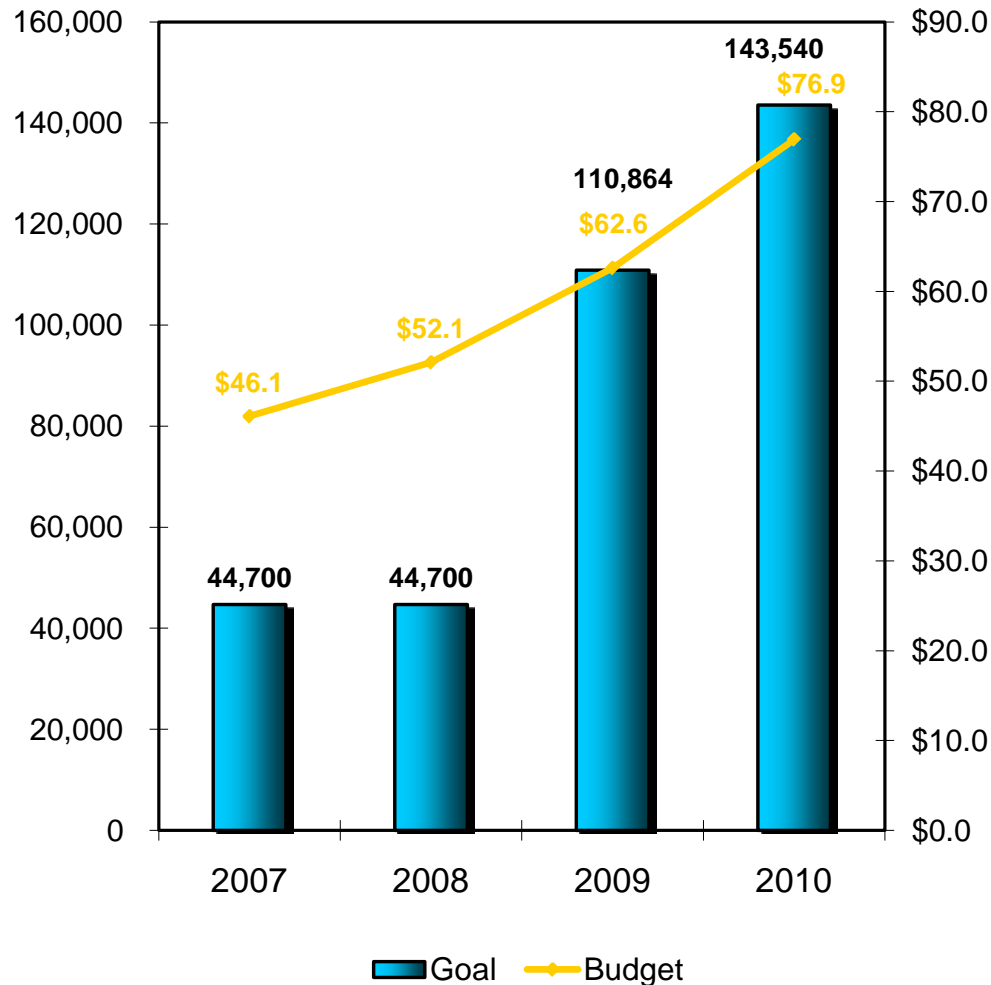


- CARE penetration goals set at 90% by 2012
- Programmatic Initiative
 - Doubled to tripled number of homes served
 - Significantly increased program budgets
- Improve Cost Effectiveness
- Laid the groundwork for a statewide Marketing Education & Outreach program
- Expanded categorical eligibility
- Reaffirmed intent to install “all feasible measures”
- Adopted “whole neighbor approach” to service delivery
- Redefined “go back” and “minimum measure” requirements
- Expanded “leveraging” and “integration” requirements

SCG has made great strides



SCG LIEE



SCG

2007 goal: 44,700 homes

2010 goal: 143,540 homes

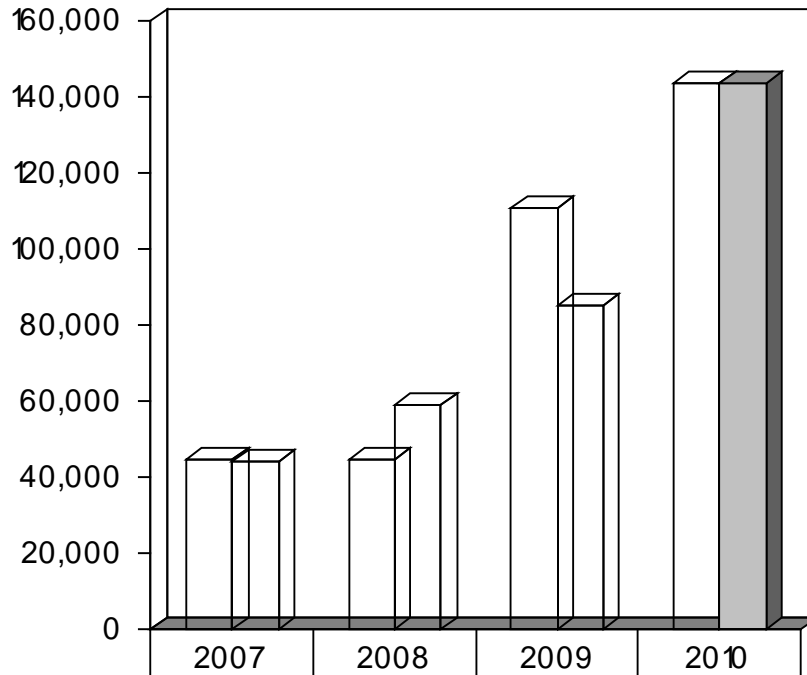
This is now a

\$77 million program

Historic Number of Homes Treated



**SDG
LIEE**



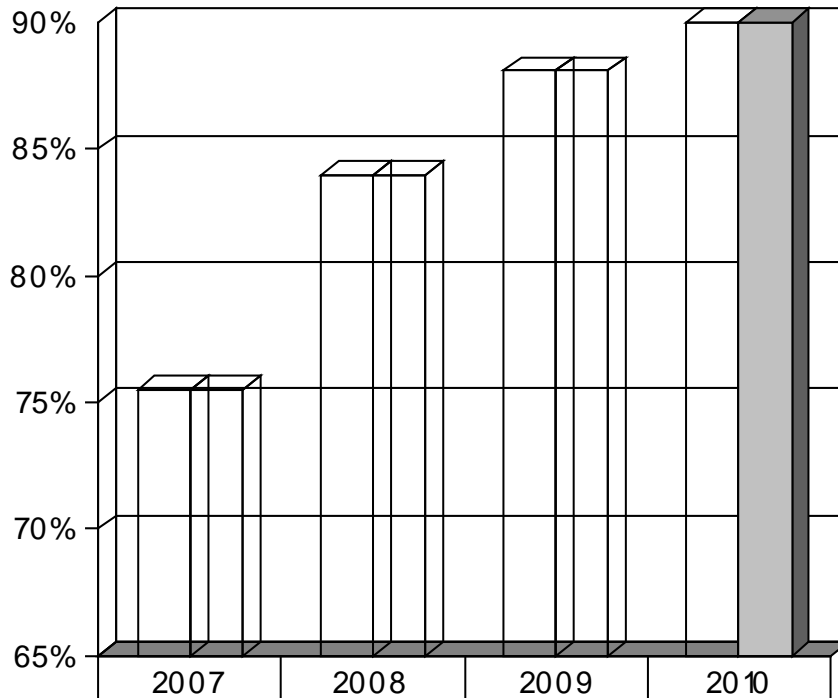
	2007	2008	2009	2010
□ Goal	44,700	44,700	110,864	143,540
□ Actual Enrollment	44,176	58,800	85,147	143,540

Our 2010 goal has more than tripled since 2007, yet we will find a way to achieve it.

SCG CARE exceeded expectations



SCG CARE



	2007	2008	2009	2010
□ Penetration Goal	76%	84%	88%	90%
□ % of Goal Achieved	76%	84%	88%	90%

Eligible Population Enrolled

- 1,332,614 in 2007
- 1,435,398 in 2008
- 1,560,543 in 2009
- 1,614,136 in 2010*

* 2010 Year-To-Date.

Here's how we did it...



Top 3 enrollment tactics

SoCalGas 2009

CARE		
Data Sharing	123,000	30%
Call Center	89,000	21%
Door-to-Door	58,000	14%

LIEE		
Door-to-Door	63,860	75%
Direct Mail	8,500	10%
Website	4,257	5%

Here's how we did it...



- SoCalGas Contractor Network
 - Community-based Organizations
 - Non-Profits
 - Community Action Partnerships
 - Workforce Centers
 - Private Contractors
 - General Contractors
 - Marketing and Sales
 - Home Builders and Real Estate entities

Contractor Services

- Enrollment & Assessment
- Weatherization
- HVAC/Gas Appliance
- Inspections

Here's how we did it...



- Grass-roots and non-traditional partnerships
 - Habitat for Humanity
 - Community Block Grants
 - Handyman Program
 - Faith-based organizations
- Sensitivity to non-Mainstream Communities
 - Immigrants or Limited English Proficiency
 - Rural or Transient
 - Disabled or Elderly
- Inter-Utility and Municipal Utility agreements
- LIHEAP Leveraging
- Other Data Sharing agreements and Leveraging partnerships

Additional efforts that drove enrollments



Key accomplishments at SoCalGas:

- **Enhanced Communication Strategy**

- Revised channel targeting to reach newly unemployed and or work furloughed customers



UNIVISION

- Spanish Language telethon

- **Expanded Web Based Outreach**

- Automated monthly e-mail campaigns targeting CARE/LIEE eligible customers who prefer electronic communication

- **Leveraging Partnerships**

- Imperial Irrigation District & Burbank Water & Power
- Los Angeles Dept of Water & Power
- USC Family of Schools
- LA County Food Stamp Program and LA County 211
- Braille Institute of America

OUTREACH
Around the Region

Save Money and Energy with the CARE and Direct Assistance Programs

For 2009, The Gas CompanySM has improved and expanded our no-cost assistance programs to help more customers and provide an enhanced customer experience. [Read More A»](#)

Contractor Corner

The Gas Company's extensive professional contractor network helps make up the backbone of our Direct Assistance Program. Read [Read More A»](#)

Help for the Recently Unemployed

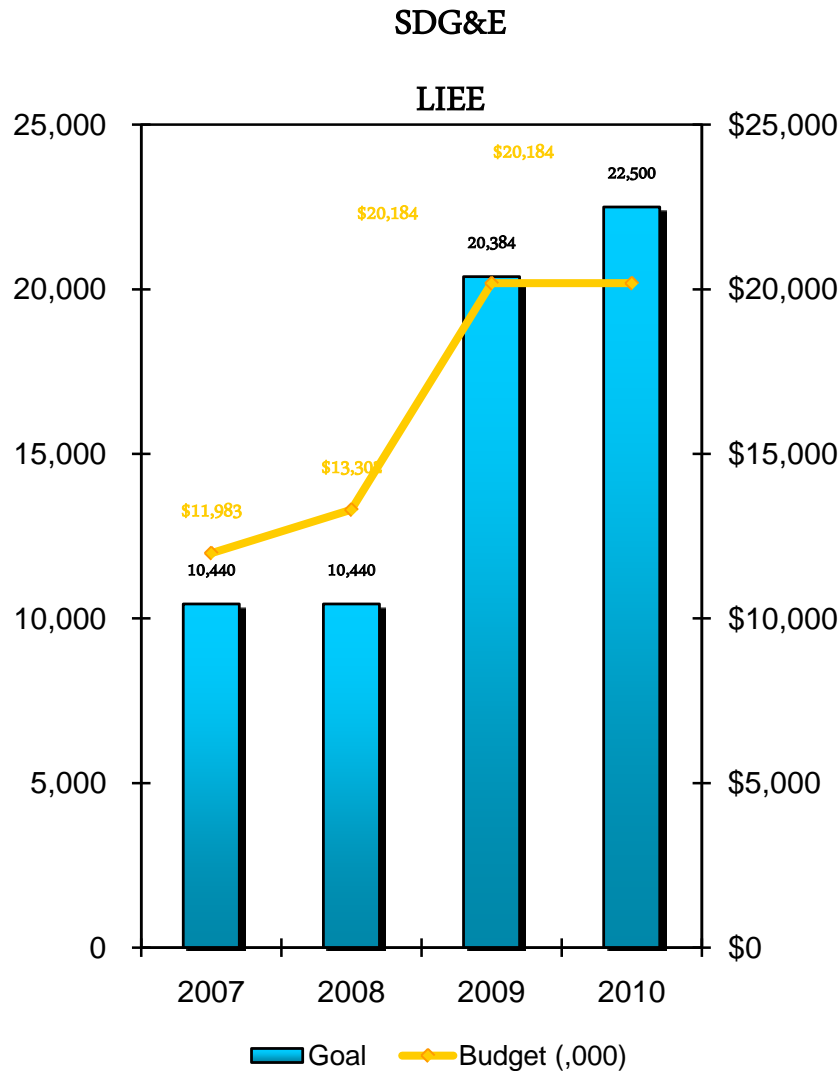
How The Gas Company is helping our recently unemployed customers [Read More A»](#)

Face of the Company

Meet Ornett Mack, Direct Assistance Program (DAP) Supervisor. [Read More A»](#)

Highest in Customer Satisfaction With Residential Natural Gas Service in the Western U.S.
[Read More A»](#)

LIEE goals doubled from 2007 - 2010



SDG&E

2007 goal: 10,440 homes

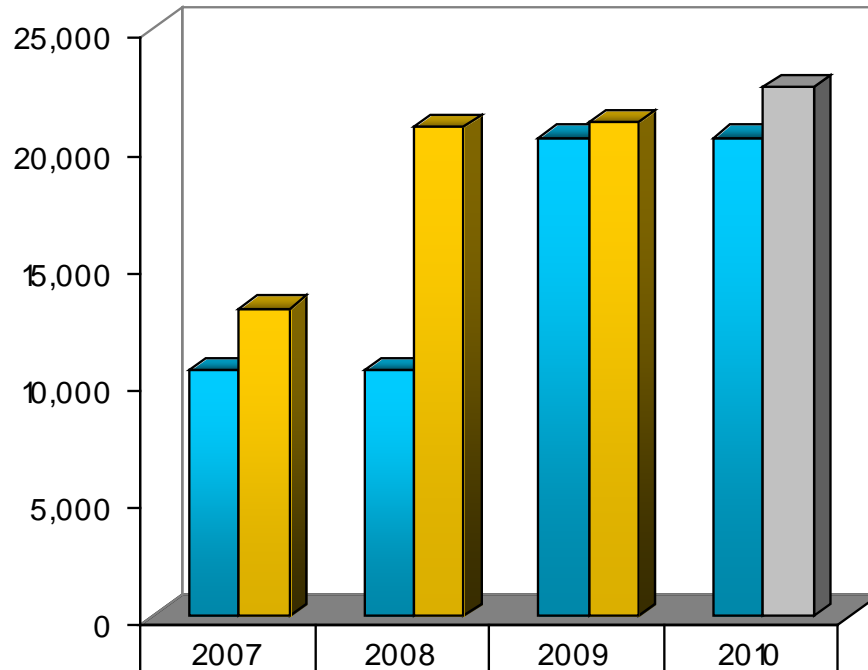
2010 goal: 22,500 homes

**This is now a
\$20 million program**

Historic Number of Homes Treated



**SDG&E
LIEE**



Our 2010 goal has more than doubled since 2007,

yet we find ways to achieve them.

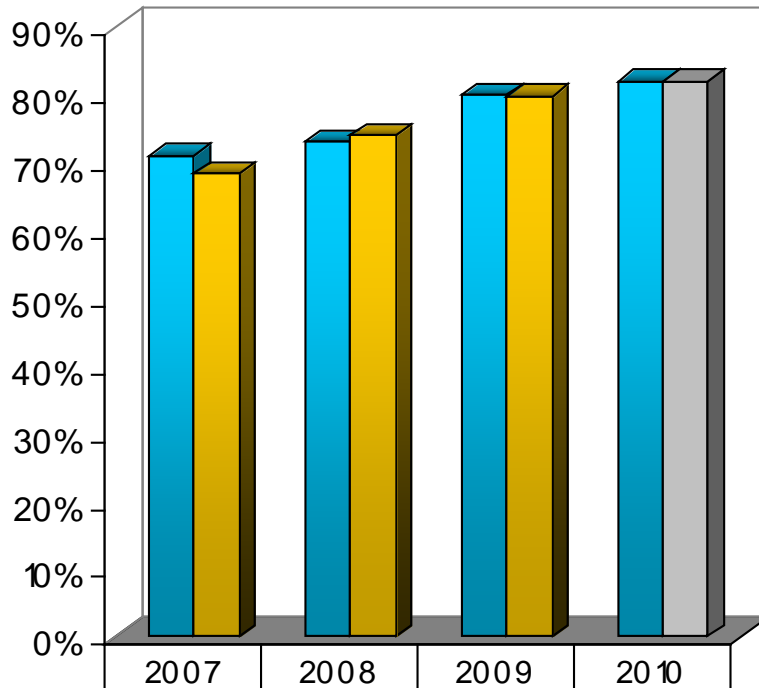
■ Goal	10,440	10,440	20,384	20,384
■ Actual Enrollment	13,074	20,804	21,031	22,500

Note: 2010 actual enrollment is a projection. Actual goal set by CPUC is 20,384.

Penetration goals also climb...



SDG&E CARE



	2007	2008	2009	2010
Penetration Goal	71%	73%	80%	82%
% of Goal Achieved	68%	74%	80%	82%

Eligible Population Enrolled

- 229,759 in 2007
- 241,196 in 2008
- 269,517 in 2009
- 272,263 in 2010*

* 2010 Year-To-Date.

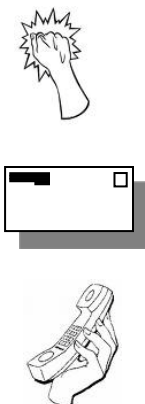
Here's how we did it...



Top 3 enrollment tactics

SDG&E 2009

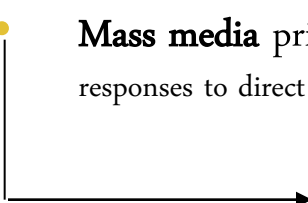
CARE		
Door-to-Door	12,438	21%
Automated Calls	11,181	19%
Community Outreach	6,112	10%



LIEE		
Door-to-Door	11,934	57%
Direct Mail	2,768	13%
Automated Calls*	1,443	7%

* Launched April 2009

- Direct marketing provides us with measurable results.
- **Mass media** primes the pump ► increases awareness and interest, leading to better responses to direct marketing and outreach efforts.



Here's how we did it...



Key accomplishments at SDG&E:

- **Internet enrollment**
 - Launched April 2009
 - Customers can now join CARE in real-time, no lag time or paper processing
 - 17% of all CARE enrollments now captured online
- **Door-to-door canvassing - LIEE**
 - Improved effectiveness by contacting customer by DM and/or phone first; increased responsiveness
 - 57% of all LIEE enrollments generated by canvassing
- **Door-to-door canvassing - CARE**
 - Launched October 2008
 - 14% of all CARE enrollments now generated by canvassing

Other activities*

- Bill inserts
- E-mails
- Print/radio/outdoor/online ads
- Web-generated leads
- Public relations
- Outreach events
- Leveraging between CARE/LIEE
- Call Center referrals
- EIC referrals
- 2-1-1 referrals
- Field & collections referrals

* Due to the size of our Hispanic audience, most communications are provided in both English and Spanish

Challenges



1. Finding eligible customers

- Data tells us many things, but not income

2. Finding willing customers

- Just because you're eligible, doesn't mean you're willing to participate
- Eligible population #'s and CPUC goals assigned to us do not factor this in
- How many times do we reach out before they're considered unwilling?

3. Inability to notify ► how do we enroll you if we can't contact you?

- Do not call list
- Opt out list (email)
- No cell phone contact - company policy doesn't allow even if customer prefers

4. Identifying disabled customers

- Not allowed to ask, yet CPUC goals require 15% new LIEE enrollments be comprised of disabled

5. Contractor credibility

- Company policy prohibits utility logos on badges or shirts; customers lack trust

6. Website

- Leading resource for consumers to get information from companies
- Yet we are behind curve - missing opportunities to connect with customer

Strategy Going Forward



1. Customer values

- We listened to our customer and learned what's important: family, faith, health, home
- Our communications will appeal to these values going forward

2. Simpler communication

- We treat our customers like they are employees or the CPUC
- We expect them to adopt our terminology and pour through pages of forms
- We need to treat them like customers – simplify, simplify, simplify

3. Streamlined enrollment

- Take the burden off the customer and place it back on us
- Customers shouldn't have to 'work' to participate
- CARE: automatic enrollment, opt out
- LIEE: direct, live calls to schedule appt and get home done easy and fast

In-Home Display Pilot



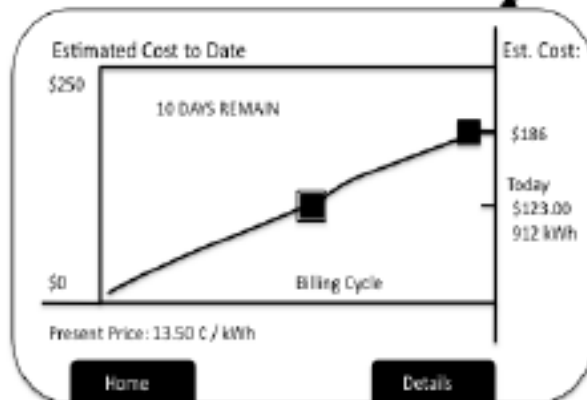
IHD Features

- Displays current household energy use, in both kWh and dollars per hour;
- Displays date, time, and current outside temperature;
- Tracks monthly bills with up-to-date billing information and an estimated end of month bill;
- Displays messages.
- Displays the cost of electricity in near real-time;

Dec 15 11:44 PM

Today	Daily Cost
Used: 27 kWh	
Price: 10¢/kWh	
Current Conditions	
37°F	
	\$2.70
	\$3.50
	Today Yesterday

Cost **Menu** **Monitor**



Menu

- Settings
- Message Log
- Help
- About This Device

Home ↓ Select

Monitor

HOUSEHOLD USAGE

----- **3.60 kW**

Household Cost Per Hour: 36.00¢
Present Price: 10.00¢ /kWh

Home

Beyond Traditional Measures:

In-Home Display Pilot



What customers are saying about the IHD device:

“It helped me to be more aware of turning off lights, etc.”

“Tells a good picture of what electricity I am using at any given time. Helps to remind me to conserve.”

“Great way to make us more aware of our energy usage.”



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Thank You

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Questions and Answers