



Developing Programs for Low and Moderate Income Customers

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The Energy Partners Example and Lessons Learned

- Understanding the challenges
 - Define the problems and issues
 - Know your customers
- Developing strategies
 - Find ways to address and overcome challenges
- Building on success
 - Continue and expand successful approaches
 - Look for additional opportunities



- *The Energy Partners Program provides free, direct-installed home weatherization, energy-efficient appliances and energy education services to income-qualified PG&E customers throughout the Company's service area.*



Low Income Energy Efficiency at PG&E: The Energy Partners Program

- **Over 25 years:** Energy Partners has been operated by PG&E since 1983
- **Statewide Low Income Energy Efficiency Program** offered by all 4 major regulated Investor Owned Utilities (PG&E, SCE, SCG, and SDG&E)
- **Regulated** by the California Public Utilities Commission
- Funded through a **public purpose charge** on customer utility bills
- Available to **all residential housing types:**
 - Serves single-family, multi-family and mobile homes
 - Available to both owners and renters
- Energy Partners participants receive **all feasible measures** for which they qualify
- Serves customers at or below **200% of federal poverty guidelines**



Energy Partners Successfully Serves PG&E's Low Income Customers

- Energy Partners serves a diverse customer base
- Energy Partners provides free weatherization and energy efficient appliances
 - PG&E-trained Energy Specialists provide initial contact, and enroll customers, conduct energy educations, and home energy assessments
 - PG&E-trained and certified Weatherization Specialists install weatherization measures
 - Appointments are made to install energy efficient appliances at the customers convenience
 - PG&E inspects Energy Partners work
- Energy Partners activity is reported and tracked internally and externally in an online database
- Energy Partners leverages the federal LIHEAP and DOE Weatherization Programs
- Impact evaluations of Energy Partners savings are conducted regularly



Managing Expectations and Budgets

PG&E must manage Energy Partners progress very closely throughout the year, including: Enrollments, Expenditures, and Commitments

- Data Management & Tracking
 - Built new, more flexible on-line program data base in 2003
 - Facilitates monthly and weekly monitoring and forecasting
 - Program tracking and reporting for internal and external parties
 - Actual program data is combined with program manager experience and low income needs assessment data to forecast program activity



Program Delivery

Design and manage delivery processes that meet your program goals
Communicate goals and monitor work flow

- Contractors
 - Frequent contractor communications
 - Monthly Contractor Meetings
 - Email tips and lessons learned
 - Field visits
 - Select customer data shared with contractors
 - Provide training and update training
 - Conduct inspections of work



Get to Know Your Customers

Understand customer needs to design a program that fulfills them

- Customers
 - Do customer research, needs assessments, segmentation studies
 - Understand and address barriers
- Awareness
 - Create customer awareness and brand identity
 - Increase awareness while maintaining reasonable participation wait lists
 - Leverage other low income and community outreach



Strategies: Integrated Media and Outreach

- PG&E's Energy Partners program team is integrating marketing and outreach with other Company community messaging.
- Outreach efforts include:
 - CARE Community Outreach Contractors (COCs)
 - Direct mailings
 - Participation in local community events, presentations with the CARE team
 - Job fairs, CPUC "We CARE" Days
 - Paid media (including advertising in local and in-language newspapers, television and radio)
 - Grassroots media
 - Partnerships with government agencies and faith-based organizations



Strategies: Using a Whole Neighborhood Approach

- Identify neighborhoods with large numbers of low income customers
 - Using census and other demographic information
 - Correlate data with PG&E customer energy usage information
 - Leverage Government Partnership program blending moderate and low income customers
- Allow self-certification in neighborhoods where over 80% of the customers are at or below 200% of the federal poverty level
- Moderate income 200-400% of the federal poverty level



- **2009-11:** Collaborative strategy through utilizing existing PG&E Low Income Energy Efficiency (LIEE) contractors to serve Residential Moderate-Income customers as well as the Multi-Family Rebate Program.
- **Target:** Customers contacted by the LIEE program who are above the LIEE income threshold and therefore ineligible for LIEE services.
- **Measures:** Similar measures to current moderate- income programs with the addition of attic insulation. The Multi-family rebate program can also rebate for the common area lighting.

Lessons Learned: Recommendations for LIEE Programs

- Clearly articulate your goals and expectations
- Plan evaluations up-front
- Monitor and track key indicators
- Invest in a good database
- Communicate regularly with your contractors
- Conduct inspections
- Manage customer expectations
- Don't expect the same approach to work everywhere
- Know your customer base
- Work with local communities





Questions?

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