

**SOUTHERN CALIFORNIA GAS COMPANY
ADVANCED METER
SEMI-ANNUAL REPORT**

August 29, 2014

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Southern California Gas Company Advanced Meter Semi-Annual Report

Introduction

This is the third Semi-Annual Report (“Report”) regarding the progress of Southern California Gas Company’s (“SoCalGas”) Advanced Meter project. In Decision (“D.”) 10-04-027, the California Public Utilities Commission (“CPUC” or “Commission”) authorized the project. Ordering Paragraph 5 required the following reporting requirements for SoCalGas:

“Southern California Gas Company shall establish a system to track and attribute program costs and projected savings from conservation. Based on this tracking system, Southern California Gas Company shall submit a report to the Director of the Commission’s Energy Division semi-annually, tracking the gas conservation impacts of the advanced metering infrastructure project to date. These reports shall serve as a forum to adjust, as necessary the elements laid out in the final outreach plan described above. We expect that customer outreach, education and communications will continue to evolve and improve as SoCalGas conducts customer research, monitors customer reaction to new AMI technology and various customer usage presentation tools, and incorporates feedback from these activities into its AMI outreach and education activities. If the report shows that the company is falling short of its projections, it shall submit revisions to its conservation plan to increase awareness, participation, and durability of conservation actions among its customers. The semi-annual reports and any revisions to the advanced metering infrastructure outreach and conservation plan shall be submitted to the director of the Commission’s Energy Division and served on the most recent service list for this proceeding. Additional costs incurred in order to improve conservation response will be funded out of contingency funds, or otherwise subject to the risk sharing mechanism authorized in Ordering Paragraph 2. “

Chapter 1 - Project Overview and Summary

In addition to the specific requirements identified in D.10-04-027, this Report provides overall status of SoCalGas’ Advanced Meter project through June 30, 2014 and builds upon previous Reports by highlighting project changes and activities that have taken place as of January 1, 2014. Previous Report filings may be accessed on SoCalGas’ website.¹

The Advanced Meter infrastructure consists of two primary components – a meter transmission unit (“MTU” or “module”) attached to SoCalGas meters, and a communications network consisting of data collection units (“DCU”) installed across the SoCalGas service territory. Operational highlights of the infrastructure and performance of the system as of June 30, 2014 include:

¹ <http://www.socalgas.com/regulatory/A0809023.shtml>

- About 455 SoCalGas employees installing modules
- Over two million modules installed
- Approximately 67 percent - over 2,500 DCUs – are constructed or ready to construct
- Approximately 91 percent of the installed modules have been deemed ‘Billing Ready’ and are now used or ready for billing customers
- Over 13 million bills based on automated reads have been provided to customers

SoCalGas has also implemented new Advanced Meter-enabled energy information feedback options for customers, including online tools that display hourly and daily gas usage and costs. Additionally, SoCalGas completed a targeted campaign to market the conservation benefits of the Advanced Meter system.

The conservation campaign launched in October 2013 and extended through the heating season, ending in March 2014. It was the first in the series of conservation “Test and Learn” campaigns to be conducted over the course of the Advanced Meter project with the goals of demonstrating how to best meet the one percent energy savings goal² associated with the Advanced Meter rollout and tracking the resulting conservation savings. Four of the conservation treatments tested during this campaign produced gas savings of 1.3 percent, showing progress towards this conservation goal.

Overall, the Advanced Meter project continues to meet its schedule and budget goals, as well as all major project milestones.

Chapter 2 - Module Installation and Network Construction Status

2.A Module Installation Status

SoCalGas has installed 2,055,691 modules through June 2014, with its first installation dating back to October 2012. Table 1 displays the installations by warehouse performed by Advanced Meter Mass Install personnel and identifies installations completed by other SoCalGas personnel.

Exhibit A provides a master schedule of planned warehouse opening and closings.

² This energy savings goal specifically refers to 1% of total *residential* gas usage.

Table 1
Module Installations by Advanced Meter Warehouse

Advanced Meter Warehouse	Number of Modules Installed		
	Module Only	Meter Change w/Module	Total
South Gate	266,691	128,353	395,044
El Centro	30,085	5,731	35,816
Irwindale	234,726	87,938	322,664
Sun Valley	137,273	44,125	181,398
Bakersfield	84,848	20,452	105,300
Indio	165,904	28,572	194,476
Northridge	102,798	19,479	122,277
Visalia	127,537	37,393	164,930
Hemet	72,318	17,363	89,681
Perris	145,234	29,319	174,553
Los Angeles	32,468	23,291	55,759
Anaheim	48,474	9,233	57,707
Total Advanced Meter	1,448,356	451,249	1,899,605
Other SoCalGas Personnel	0	156,086	156,086
Total	1,448,356	607,335	2,055,691

About 92 percent of the modules are being installed by Advanced Meter personnel, with about eight percent being installed by other SoCalGas personnel. In general, other SoCalGas personnel are involved when the installation requires extensive modifications to the existing meter configuration such as installing the modules on complex industrial and commercial meters. Other personnel are also replacing existing curb meters with new curb meters containing a pre-installed module.

As Table 1 displays, about 70 percent of the modules were installed on existing meters, while 30 percent of the time, the meter was replaced with a new meter with a module already installed.

Installation teams work out of warehouses leased specifically for the Advanced Meter project. As of June 30, 2014, approximately 455 installers were employed. Table 2 provides an overview of the installation workforce for each of the warehouses opened through June 2014.

Table 2
SoCalGas Installation Workforce by Warehouse

Warehouse	Number of Employees
South Gate	67
Irwindale	69
Sun Valley	28
Northridge	43
Visalia	45
Hemet	45
Perris	51
Los Angeles	53
Anaheim	54
Total	455

Throughout the project, the Advanced Meter team has experienced some injuries and incidents. Table 3 below displays the results from January through June 30, 2014. SoCalGas aspires to have zero incidents and has taken a positive approach in providing its Advanced Meter staff with additional safety and training resources. To that end, SoCalGas added a day dedicated to safety to the installer training curriculum, created short safety films and launched its “Safe and Sound” Safety Campaign to promote safe behavior at the workplace and at home.

Table 3
Advanced Meter Safety Incidents
Through June 30, 2014

	Number of Incidents	Rate*	Target
Occupational Safety & Health Administration (“OSHA”)	18	5.7	3.9
Controllable Motor Vehicle Incidents (“CMVI”)	6	3.3	5.8
Lost Time Incidents (“LTI”)	3	0.9	1.2

*OSHA Rate is the number of incidents per 200,000 hours worked

*CMVI Rate is the number of incidents per million miles driven

*LTI Rate is per 100 workers

2.B Communication Network Construction Status

The communications network consists of DCUs deployed across the SoCalGas service territory. The DCUs receive the meter reading data from the modules installed on each meter. Each

module transmits twelve hourly meter reads four times a day, communicating for less than two minutes per year. The data is encrypted and transmitted across a licensed frequency from the module to the DCU.

SoCalGas is currently in the process of installing 3,765 DCUs based on the propagation study provided by Aclara, the technology vendor. The specific DCU locations, referred to as design points, are determined based on the propagation study which takes into account the location of the modules on the six million meters, the topography of the surrounding area, and the influence of the environment on the transmission of the radio signal. The DCUs can be placed within a 500 foot radius of the design point.

The Advanced Meter system is designed to ensure that SoCalGas customers receive their hourly consumption data. To achieve this goal, most modules will communicate with at least three DCUs. The actual number of DCUs to be installed will be determined by a two-step process. After these DCUs are installed, SoCalGas will evaluate the performance of the network and identify gaps in the network. SoCalGas will then install additional DCUs to remediate these deficiencies in performance.

SoCalGas' plan is to install DCUs prior to the scheduled module installation so that data can be received soon after the module is installed. Overall, SoCalGas has achieved this goal. Table 4 displays the status of the SoCalGas network as of June 30, 2014.

Table 4
Status of DCUs (June 30, 2014)

DCU Status	Number of DCUs	Percent of DCUs
Installed	2,507	67%
Ready to Construct	90	2%
Negotiating with Local Governments/Other Third Parties	1,139	30%
Not Started	29	1%
Total To Be Installed	3,765	100%

Approximately 69 percent of the network has been constructed or is ready to construct. SoCalGas continues to negotiate with local governments and third parties to install the remaining 31 percent of the network. By June 30, 2014, SoCalGas installed 2,507 DCUs with an additional 90 DCUs ready for construction. However, the primary challenge in constructing the network continues to be negotiating with local governments to obtain permits to install the DCUs. Table 5 displays the locations of installed DCUs to date.

Table 5
Location of Installed DCUs

DCU Location	Installed DCUs
SoCalGas Owned Poles in	
SoCalGas Facilities	64
Public Right of Way	1,852
Caltrans Right of Way	11
Lease Other Third Party Property	0
Private Easement	18
Total	1,945
Attached to Third Party Assets	
Los Angeles Bureau of Street Lighting	337
SCE Street Lights	93
PG&E Street Lights	2
SDG&E Street Lights	0
Other Cities Street Lights	130
Other Public/Private Assets	0
Total	562
Total DCUs Installed	2,507

To date SoCalGas has installed DCUs on a SoCalGas owned pole in the public right of way under its franchise nearly 80 percent of the time. The second most common method has been to install DCUs on local government owned street lights.

When a DCU is attached to a third party owned asset, SoCalGas negotiates a contract with the asset owner which usually includes:

- Fees to lease the space on the asset; and,
- Energy rates for the electricity to power the DCU.

SoCalGas has executed contracts with Pacific Gas & Electric Company (“PG&E”), Southern California Edison Company (“SCE”), San Diego Gas & Electric Company (“SDG&E”), the City of Los Angeles Bureau of Street Lights (“BSL”), and with the cities of Anaheim, Atascadero, Bakersfield, Bellflower, Brawley, Brea, Burbank, Cerritos, Chino Hills, Claremont, Coachella, El Paso de Robles, Fullerton, Glendale, Indio, Lemoore, Monrovia, Morro Bay, Ontario, Pasadena, Pomona, Rancho Mirage, Riverside, San Luis Obispo, San Marino, Seal Beach, Whittier, and Yorba Linda.³

³ Pursuant to Commission Resolution ESRB-1 dated May 10, 2013 (SCE), Resolution ESRB-2 dated June 27, 2013 (SDG&E) and Resolution ESRB-3 dated June 27, 2013 (PG&E) SoCalGas is able to permanently attach the DCUs to these electric utilities’ street lights.

With 2,507 DCUs constructed, SoCalGas has received 110 complaints and 21 inquiries, including concerns about the DCU’s aesthetics, glare, or, location. In each case, SoCalGas contacted the complaining party to resolve the complaint. As a result of customer concerns, SoCalGas has relocated 35 DCUs. Otherwise, the concerns have been resolved without relocating the DCU.

Of the 12 counties and 222 cities in the SoCalGas service territory, SoCalGas has finished installing DCUs in 3 counties and in 136 cities/communities.⁴

SoCalGas has reached contract agreement with 22 cities and six counties. In addition, SoCalGas is in active negotiations with 64 cities and three counties to install approximately 1,258 more DCUs over the next year.

Where the DCU design point falls entirely within private property, SoCalGas negotiates easements with the private property owner(s). Installations of this type usually require a contract to secure the right to locate on the third party property.

When SoCalGas installs a DCU on its own pole, the DCU is solar-powered. When installed on a street light, the DCU is most often powered by electricity from the street light. Given the preponderance of new poles, most of the DCUs are solar powered. Table 6 shows the breakdown between solar and A/C powered DCUs.

**Table 6
Power Source for DCUs**

Installed DCUs	Solar Powered	AC Powered
2,507	1,951	556

Chapter 3 - System Performance

The areas of billing, Customer Service Field, and presentment of hourly gas consumption data to customers are key elements for measuring performance of the system.

3. A Network Performance

The most basic measure of system performance is to measure the data delivered as a percentage of the expected data to be delivered. This has direct impacts to both billing and the presentment of hourly gas consumption data to customers. In a perfect system, SoCalGas would receive data for every customer for every hour, each day of the year. To provide this data, the modules must communicate with the DCUs and the DCUs must transmit the data to SoCalGas back office systems 100 percent of the time.

Table 7 displays the breakdown of modules that have successfully communicated with SoCalGas’ back office systems.

⁴ Exhibit B provides a list of the county and cities installed as of June 30, 2014.

Table 7
Module Communication Status

Module Communication Status	Modules Installed	Percent Installed With Network
Total Modules Installed	2,055,691	
Modules Installed – Incomplete Network	548,690	26.7%
Modules Installed with Complete Network ¹	1,507,001	73.3%
Delivering 100 Percent of Expected Reads	1,350,904	89.6%
Missing 1-12 Reads	79,325	5.3%
Missing More Than 12 Reads ²	73,771	4.9%
Missing All Reads	3,001	0.2%

¹ A Complete Network indicates that all planned DCUs for a given area per the original network design are operational.

² Missing more than 12 reads but at least one read has been communicated

Over 70 percent of the modules have been installed where network has been completed and only about 27 percent of modules are installed where the network is incomplete. SoCalGas generally installs modules where the network is available; however, some exceptions to installing outside of an available network include instances when new business meters are connected and planned meter changes are being performed. Additionally, when a meter fails in the field, it is replaced with an integrated meter and module, regardless of whether the network is installed or not.

As illustrated in Table 7, nearly 90 percent of the installed modules within a completed network are successfully communicating all of a customer’s hourly data on a monthly basis. About 5 percent of the modules are missing 1-12 reads, which means that they have had only 1 or 2 unsuccessful communications per month. That is, one or two six-hour periods have not been successfully communicated to the SoCalGas back office systems. SoCalGas does not consider a module performing at this level to be problematic for billing as enough hourly data is being received for these purposes.

About 5 percent of the modules are missing more than 12 reads but have communicated at least one read. SoCalGas continues to examine module modifications and network enhancements to improve the performance of these modules.

Given the overall level of network performance described in this section, the next section describes the operational results associated with the ability to produce an accurate bill.

3.B Billing Data Performance

The Advanced Meter modules replace the manual reads with an automated read, with the expectation that the system will produce more accurate reads (no data entry mistakes) and fewer estimated reads (meter access problems are largely eliminated).

Table 8 displays the progression of modules from installation to actual use for billing.

Table 8
Advanced Meters Utilized for Billing

Modules Installed as of June 30, 2014	2,055,691
Modules in 'Billing Ready' Status	1,881,742
Advanced Meter Reads Requested for Billing	1,809,542
Billing Data Provided by Advanced Meter	1,807,166
Billing Data Not Provided by Advanced Meter	2,376
Percent Provided by Advanced Meter – Actual Read	99.63%
Percent Provided by Advanced Meter – Estimated Read	0.24%
Percent Not Provided by Advanced Meter	0.13%

Approximately 91 percent of the installed modules have been deemed 'Billing Ready' and are now used or ready for billing customers. Of the remaining nine percent, most are still in the process of completing one of the test elements needed to become 'Billing Ready.' Others are located in areas with incomplete DCU coverage, or are located in areas with insufficient module density to support conversion to Advanced Meter billing.

Modules in areas with network coverage which do not pass the 'Billing Ready' tests are monitored and, if necessary, replaced. They may also point to insufficient network coverage or DCU problems, which are then remediated.⁵

For the Billing Ready modules, the system provides a high percentage of accurate reads. About 99 percent of the reads requested were actual, accurate reads. The system also provided an additional 0.24 percent of reads which were 'estimated reads' based substantially on reads received earlier in the month, rather than on a particular designated day. Only about 0.13 percent of the reads could not be provided by the Advanced Meter system.

SoCalGas began to calculate bills using automated reads in April 2013. Table 9 displays the number of bills based on Advanced Meter reads as of June 30, 2014.

⁵ As referenced in Chapter 2, additional DCUs may have to be added to improve system performance.

Table 9
Customer Bills Based on Advanced Meter Reads

Month	Number of Bills Based on Advanced Meter Reads
April- December 2013	4,528,598
January	1,141,542
February	1,299,351
March	1,441,269
April	1,594,784
May	1,772,241
June	1,881,742
Total	13,659,527

In total, over 13 million bills based on automated reads have been provided to customers between April 2013 through June 30, 2014.

In July 2013, SoCalGas implemented software that enabled the utilization of automated reads for the initiation of new service. With Advanced Meter automation, a field visit to collect a customer’s starting read was no longer necessary for turn-on orders that did not require entry into the home. SoCalGas’ Customer Service Field organization has seen a reduction of nearly 157,895 orders since the implementation of the automated reads for the initiation of new service.

Chapter 4 - Financial Status

To track expenses during the project, Ordering Paragraph 7 of the D.10-04-027, stated:

“Southern California Gas Company shall file an advice letter no later than 30 days from the effective date of this decision, establishing a balancing account and detailing the cost recovery mechanism in conformance with this decision. Southern California Gas Company is authorized to recover deployment costs up to \$1.0507 billion in this account, plus additional amounts, if any, consistent with the terms and conditions of the Risk Sharing Mechanism approved in Ordering Paragraph 2.”

On August 4, 2010, the CPUC approved AL 4110, effective April 8, 2010, which established the Advanced Meter Infrastructure Balancing Account.

The CPUC approved budget of \$1,050 million for the SoCalGas Advanced Meter project was augmented by re-directing \$13.5 million of previously approved General Rate Case funding for a Remote Automated Meter Reading (“RAMR”) project. SoCalGas halted the implementation of its RAMR project, a drive-by meter reading system, when its Advanced Metering Infrastructure (“AMI”) application was submitted, and in the AMI application requested that this funding be re-directed to the Advanced Meter project. In D.10-04-027, the CPUC approved this request.⁶ The total budget for the SoCalGas Advanced Meter project is \$1,064 million, which included a contingency fund of \$68.7 million.

Table 10 displays the Advanced Meter spending through June 2014, by the major project activities, and also displays the forecast for the entire project. SoCalGas believes the project will be delivered within the approved budget.

Table 10
Financial Results
Recorded 2010 through June 2014
Forecast July 2013 – 2017

	2010	2011	2012	2013	YTD 2014	Project to Date	Project Forecast
Project Management Office	2,619	6,477	6,634	4,945	2,133	22,808	29,720
Meters, Modules & Installation	120	3,718	27,957	116,004	93,489	241,289	519,903
Network	777	3,744	14,429	23,805	9,167	51,922	86,827
Information Technology	6,011	16,873	21,931	16,015	5,182	66,011	95,562
Customer Outreach	324	1,027	2,085	5,502	2,591	11,529	28,105
Employee Awareness	65	3,078	3,732	2,088	626	9,589	11,848
Other	303	-	1,162	3,576	2,195	7,236	13,360
Taxes							27,845
Overheads & AFUDC	2,382	10,828	23,663	33,812	20,641	91,325	225,842
Contingency							25,244
Total	12,601	45,745	101,594	205,746	136,023	501,709	1,064,257

The sequencing of the spending to date is typical of the pattern for many major projects. The early years of the project are spent organizing the large project team; developing new business processes; and, building and implementing the information systems that support the construction of the DCUs and installation of the modules. SoCalGas’ plan contemplated that the DCUs would be constructed prior to the installation of the modules so that the modules

⁶ A.08-09-023, Prepared Direct Testimony of Edward Fong, page 15.

would be effective in delivering benefits to customers. As indicated in Chapter 2, SoCalGas began installing its DCUs in June 2012 and its modules in October 2012.

Table 10 displays spending patterns as described in previous Reports. The current spend as of June 2014 continues to reflect the project in its second year in full construction. The purchases and installation of meters and modules continue to be the primary spending at approximately \$93 million in 2014. The second largest activity is the construction of the communication network at approximately \$9 million and lastly, the continued build of information systems at \$5 million through June 2014.

The contingency fund continues to be approximately \$25 million, as stated in previous Reports.

Chapter 5 - Meter Reading Work Force Impacts

The Meter Reading work force is the most significantly impacted by the Advanced Meter project as Meter Reading positions will be virtually eliminated by the project. Both SoCalGas and the CPUC are concerned about these impacts. The Commission specifically addressed this concern. Ordering Paragraph 1 of the D.10-04-027 states:

“Southern California Gas Company shall supplement by \$1 million its funding for workforce retention and retraining. This fund is established to better protect the employment interests of Southern California Gas Company’s meter reading workforce and should be used to extend severance, vocational training, and other transitional opportunities to employees affected by the decision to pursue advanced metering infrastructure.”

In response to this direction, SoCalGas set aside funding in its Educational Assistance Fund specifically to support the Meter Reading personnel in place in April 2010. As of June 30, 2014, meter readers had been reimbursed approximately \$93,200 through this fund. While this fund has not been heavily utilized by meter readers, they have been active in seeking employment opportunities within the Company.

Table 11 displays the current status of those Meter Reading personnel who were employed in April, 2010, when the project was approved by the CPUC.

Table 11
Status of Meter Reading Personnel Employed in April 2010

Meter Reading Personnel	Work Force in April 2010	Remain in Meter Reading June 30, 2014	Left Company	Transition Within Company
Full-time	166	37	25	680
Part-time	818	85	157	
Management	46	23	4	19
Total	1,030	145	186	699
Percent of Work Force	100%	14%	18%	68%

As Table 11 shows, 699 employees (68 percent of the Meter Reading personnel from April 2010) have transitioned to another position within the Company. Eighteen percent of those employed in 2010 have left the Company and 145 employees, 14 percent, remain in the Meter Reading organization.

Among the non-management Meter Reading employees who have transitioned to jobs within the Company, nine filled positions recently approved by the CPUC in the Energy Savings Assistance Program (“ESAP”).⁷ These Customer Assistance Representatives (“CARs”) office and field positions were specifically targeted to meter readers impacted by the Advanced Meter project.

SoCalGas continues to encourage Meter Reading employees to explore all opportunities outside of the Meter Reading organization.

Chapter 6 – Community Education and Outreach

SoCalGas staff performs a multitude of outreach activities to inform customers about Advanced Meter project activity. SoCalGas’ personnel developed a local stakeholder education and community outreach program to ensure every city and county SoCalGas serves is addressed. During the network construction process, outreach is done at the city level with initial city briefings to the City Manager and staff including presentations to the city councils. Outreach to the community includes, but is not limited to, one-on-one customer meetings, door knocking, homeowner associations, community/neighborhood councils, and community groups.

These efforts include briefing local elected officials, media outreach, community town hall events and local speaking engagements.

⁷ D.12-08-044, Ordering Paragraph 127.

6. A Outreach Organizations and Events

Outreach efforts are complemented by a number of local organizations who simultaneously perform outreach activities under contract to SoCalGas. SoCalGas has partnered with GeM Communications (“GeM”) to manage the solicitation and implementation efforts for local organizations to perform community outreach. GeM manages the RFP process and contracts with community-based organizations (“CBOs”), and faith-based organizations (“FBOs”), disability agencies, Chambers of Commerce, and Business Organizations that conduct outreach to sensitive communities and customers in specific Advanced Meter installation areas. As of June 2014, over 100 organizations have been contracted through GeM to support outreach activities for the project, please refer to Exhibit C for a comprehensive list of organizations contracted through GeM.

Each organization provides a specialized focus that allows SoCalGas to reach a specific audience in a given geography. The strength of the program is the ability to leverage the resources, experience and reach of each organization to create awareness of the Advanced Meter project and educate customers and communities of the benefits. A few examples of the unique partnerships include:

United Way of Tulare County- This organization leveraged its existing 2-1-1 referral and information phone system to promote Advanced Meter. 2-1-1 is a non-emergency phone number that connects the community with resources, services and volunteer opportunities. It is free, confidential and available 24 hours a day, 7 days a week. 2-1-1 telephone specialists are trained to answer questions, listen to callers' needs and connect callers with accurate referrals. Referrals are based on a continuously updated database with more than 200 health and human service programs and non-profits in Tulare County. In Tulare County, 2-1-1 receives 10,000 calls annually from low-income residents seeking health and human services. While callers were placed on hold, Advanced Meter messages played with the option for more information in English or Spanish.

Training Occupational Development Educating Communities (“TODEC”) Legal Center- TODEC Legal Center in Perris conducted over 100 outreach educational presentations and disseminated easily understood information for the Advanced Meter technology implementation and other consumer programs to non-English and limited English speaking, low-income families and/or including the disadvantaged, difficult to serve and hard to reach populations. TODEC provided direct services to immigrant consumers by providing information and education on Advanced Meter and accessing other consumer programs, services, and activities. Grass root outreach has been instrumental in this program. To date, TODEC has informed and educated more than 2,451 people.

The local organizations have presented Advanced Meter information at over 830 community events and briefings surrounding all warehouses open through June 2014. Coupled with the more than 120 events and briefings conducted by SoCalGas personnel, Advanced Meter has

delivered over 960 events and briefings to inform customers about the project in 2014.⁸ The following sections identify the local organizations working with SoCalGas, and describe both the local organization outreach and the SoCalGas outreach, organized by the Advanced Meter warehouses opened thus far.

Media Highlights:

- SoCalGas teamed up with the Inland Empire 66ers Baseball Club to promote the Advanced Meter project at 2014 home games that are attended by local residents who live in San Bernardino County and surrounding cities. The 66ers provided promotional nightly Public Address announcements, radio broadcast Public Service Announcements (“PSAs”), printed materials, and booth exhibit space for Advanced Meter outreach.
- Black Voice News (Riverside and San Bernardino Counties) published PSAs and an article in its February and March edition.
- SoCalGas has also worked on earned and paid media opportunities which have gained positive media coverage:
 - March 6: Visalia Times Delta <http://www.visaliatimesdelta.com/article/20140306/NEWS01/303060008/Gas-meters-evolve>
 - June 6: KNBC-TV <http://www.nbclosangeles.com/news/local/Residents-Question-New-Advanced-Gas-Meters-262186061.html>
 - Daily SoCal: <http://www.dailysocal.com/2014/07/07/southern-california-gas-introduction-advanced-meter/>
 - Examiner: <http://www.examiner.com/article/the-southern-california-gas-company-s-advanced-meter>
 - San Gabriel Valley Tribune: <http://www.sgvtribune.com/general-news/20140115/southern-california-gas-company-to-upgrade-meters-in-west-covina>
 - Asian Business Association Los Angeles Web Page <http://www.abala.org/news-announcements/advancedmeter/>
 - Duarte Chamber of Commerce Web Page <http://www.duartechamber.com/advanced-meter.htm>
 - City of Eastvale Web Page <http://www.eastvaleca.gov/index.aspx?page=29&recordid=951>
- Other articles were published in several Chamber and City newsletters including: Banning, Yucaipa, Perris, Duarte, San Dimas, West Covina, Glendora, Temecula, Murrieta, Hemet/San Jacinto, West Covina, Corona, and Eastvale.

⁸ Exhibit D provides a list of outreach events and briefings conducted from January through June 2014.

6.B Warehouse Opening Activities

6.B.1 Anaheim Warehouse

The Anaheim warehouse opened for operation in February 2014. This warehouse serves the cities of Anaheim, Anaheim Hills, Brea, Buena Park, Cerritos, Costa Mesa, Corona, County of Orange-Unincorporated, Eastvale, Fullerton, Garden Grove, Huntington Beach, Irvine, La Habra, La Palma, Newport Beach, Placentia, Seal Beach, Yorba Linda, Villa Park and Westminster.

Outreach activities for this warehouse included 65 events. These events primarily focused on targeted outreach to different sectors of the community such as the Hispanic population, African Americans, Asian, Anglo as well as senior population and business professionals. During these events information packets that included project fact sheets and project overview were distributed. Local elected officials and their staff, along with police and fire departments were informed about the project and given details of expected installation time of equipment in the various sectors of Anaheim and the surrounding communities.

6.B.2 Los Angeles Warehouse

The Los Angeles warehouse opened for operation in January 2014. This warehouse serves the cities of Beverly Hills, Vernon, West Hollywood, and City of Los Angeles including the communities of Lincoln Heights, Boyle Heights, Downtown, Los Feliz, Elysian Park, Silver Lake, Echo Park, Hollywood, Mid City, Central and South Los Angeles, as well as Los Angeles County Unincorporated areas such as East Los Angeles.

Outreach activities for this warehouse included 68 events and briefings including presentations to 47 City of Los Angeles Neighborhood Councils advising them of installations taking place in the area and providing council board members with information packets that include an overview presentation of the Advanced Meter project, fact sheets, and samples of materials which the customer will receive including the door hanger once installation is complete and the letter the customer receives 30 to 60 days prior to installation advising them of installation approaching.

Due to the location of this warehouse and the areas that this warehouse will be installing, support from local council member field offices as well as local police departments has been garnered. In particular, the Los Angeles Police Department (“LAPD”) has been briefed about the project including details and timing of installation work in order to properly plan for the safety of installers while in certain areas as well as information regarding parking and other unique circumstances of the densely populated area of Los Angeles.

6.C Ongoing Outreach of Operating Warehouses

In addition to the two new warehouses opening, seven warehouses remain open and continue with installation activity. Some outreach activity highlights for some of the operating warehouses include:

Northridge / Sun Valley Warehouses- Participated in the Valley Economic Alliance - Valley of the Stars Reaching New Heights 20th Anniversary of the Northridge Quake event at California State University, Northridge. Many community members and elected officials were on hand as information was provided at the community expo regarding the Advanced Meter project.

Visalia Warehouse - Advertisement with the Visalia Rawhides Minor Baseball League was done to inform customers about the Advanced Meter project and what to expect before and after installation. The advertisement package included a 30-second pre-recorded radio spot and a live promotional read which aired during each of the 140 games Rawhide radio broadcasts in 2014 on AM1270. Plus, there was a live promotional read during all 70 home games over the stadium public address system at Rawhide Ballpark. This advertisement helped promote the project in Visalia and surrounding communities.

6.C Radio Disney

SoCalGas' Advanced Meter project continued its partnership with Radio Disney with a campaign that ran from March through June 2014. Through the support of on-site, on-air, and social media elements, Radio Disney continued to educate students, families and teachers about the Advanced Meter project and energy conversation. The Radio Disney "Road Crew" attended community events and elementary schools within the warehouses where MTU installations were occurring.

The Radio Disney "Road Crew" appeared at six elementary schools with a customized itinerary where games, activities and contests were executed by incorporating the Advanced Meter and energy conservation messages. The experience was created to help educate students and teachers allowing students the opportunity to educate their parents. Games and competitions included: gas versus electric charts, name that price, trivia, and what does gas smell like, to name a few. There was also a show and tell with the gas meter and module to explain how the Advanced Meter works and where it could be located in their homes. Each school assembly was approximately an hour long and prizes were awarded from Radio Disney to participants. Literature on the Advanced Meter project was distributed in students' parent packs that are taken home which provided their families with detailed information about SoCalGas' Advanced Meter project.

The Radio Disney "Road Crew" also appeared at five community events. Each appearance was two hours and featured the SoCalGas Advanced Meter project. Families participated in the educational games and contests and were awarded with prizes that included family packs of tickets to fairs, zoos, and family fun centers to name a few. An Advanced Meter was also on display with literature regarding the project.

In support of the community events, thirty second promotional spots tagging SoCalGas aired during the week of each event, 30 times per event. A total of 150 event promos aired during the campaign.

A total of 140 branded sixty second commercials aired during campaign time frame featuring Advanced Meter messages. An additional 65 thirty second commercials aired as a bonus during the campaign.

Table 12
List of Community Events and School Assemblies Organized as Part of Radio Disney

Event	Type of Event	Date
San Dimas Family Festival	Community Event	April 12, 2014
La Habra Spring Fair	Community Event	April 13, 2014
Fletcher Elementary – Orange	School Assembly	April 22, 2014
Mulnomah Elementary – Los Angeles	School Assembly	April 23, 2014
Winchester Elementary – Menifee	School Assembly	May 6, 2014
El Sereno Elementary – Los Angeles	School Assembly	May 20, 2014
Garden Grove Strawberry Festival	Community Event	May 24, 2014
Romoland Elementary – Riverside	School Assembly	May 28, 2014
Alta Murrieta Elementary – Murrieta	School Assembly	June 9, 2014
Orange County Marketplace Spring Music Series	Community Event	June 22, 2014
Fountain Valley Summerfest	Community Event	June 27, 2014

Chapter 7- Customer Awareness and Satisfaction

Given the extent of its outreach activities, SoCalGas monitors how these activities translate into customer awareness and, ultimately, customer satisfaction about the Advanced Meter project. SoCalGas utilizes a variety of market research diagnostics to monitor the “pulse” of customers pertaining to the Advanced Meter installation process, customer communications, new programs and services, and customer attitudes and motivational drivers to behavioral change.

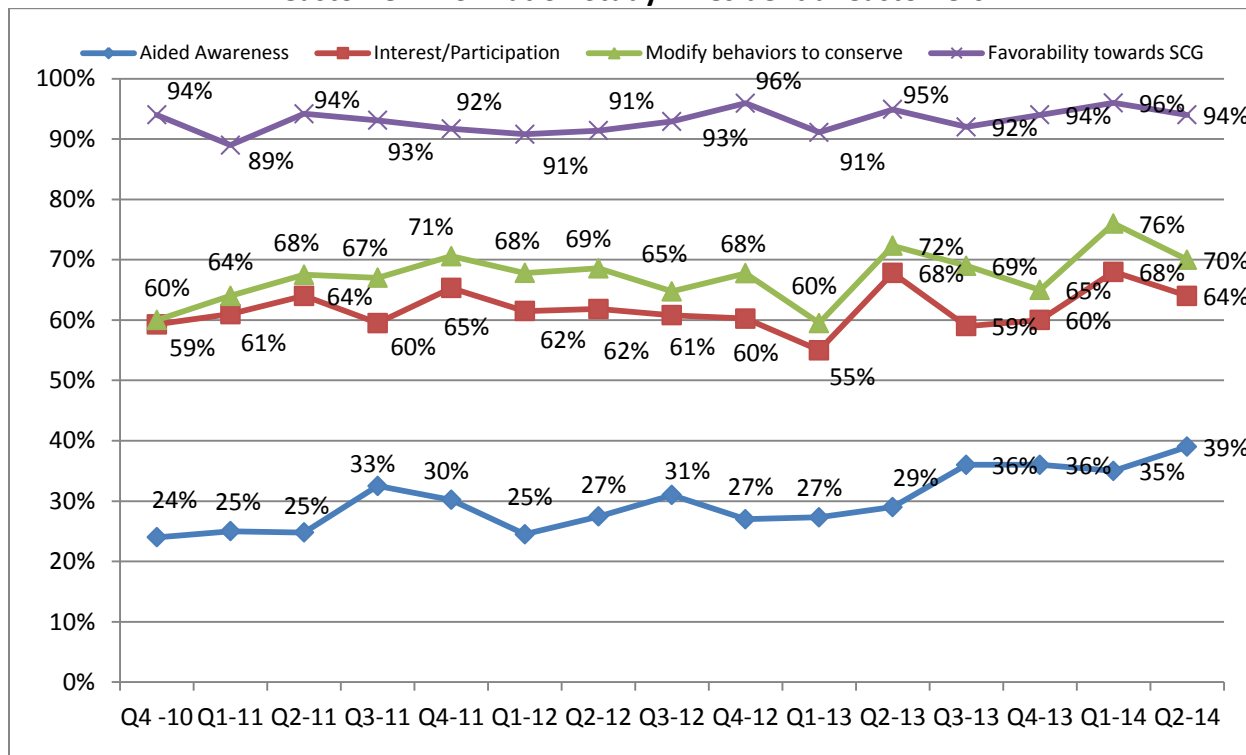
7.A Customer Information Study (“CIS”) Results

For purposes of monitoring overall customer awareness and perceptions, SoCalGas uses the Customer Information Study (“CIS”)⁹ which is administered by Davis Research. CIS is SoCalGas’ public opinion tracking study. It is a quarterly phone survey measuring residential and business customer favorability across several factors: favorability, price and value, safety, reliability and reputation. The survey is administered to a representative sample of SoCalGas’ entire customer base, including customers for whom an Advanced Meter has not yet been installed.

Beginning in the fourth quarter of 2012, SoCalGas added three Advanced Meter related questions to the quarterly survey. Figure 1 displays the CIS results for the general awareness questions about Advanced Meter for residential customers while Figure 2 displays the results for business customers.

⁹ Formerly called iTracker Customer Perception Study.

Figure 1
Customer Information Study – Residential Customers



Questions:

IM1. How would you rate SoCalGas overall on a scale of 1 to 7 where 1 means very unfavorable and 7 means very favorable?

AM1. Are you aware of a new gas meter that transmits natural gas usage information remotely and more frequently from the meter to SoCalGas?

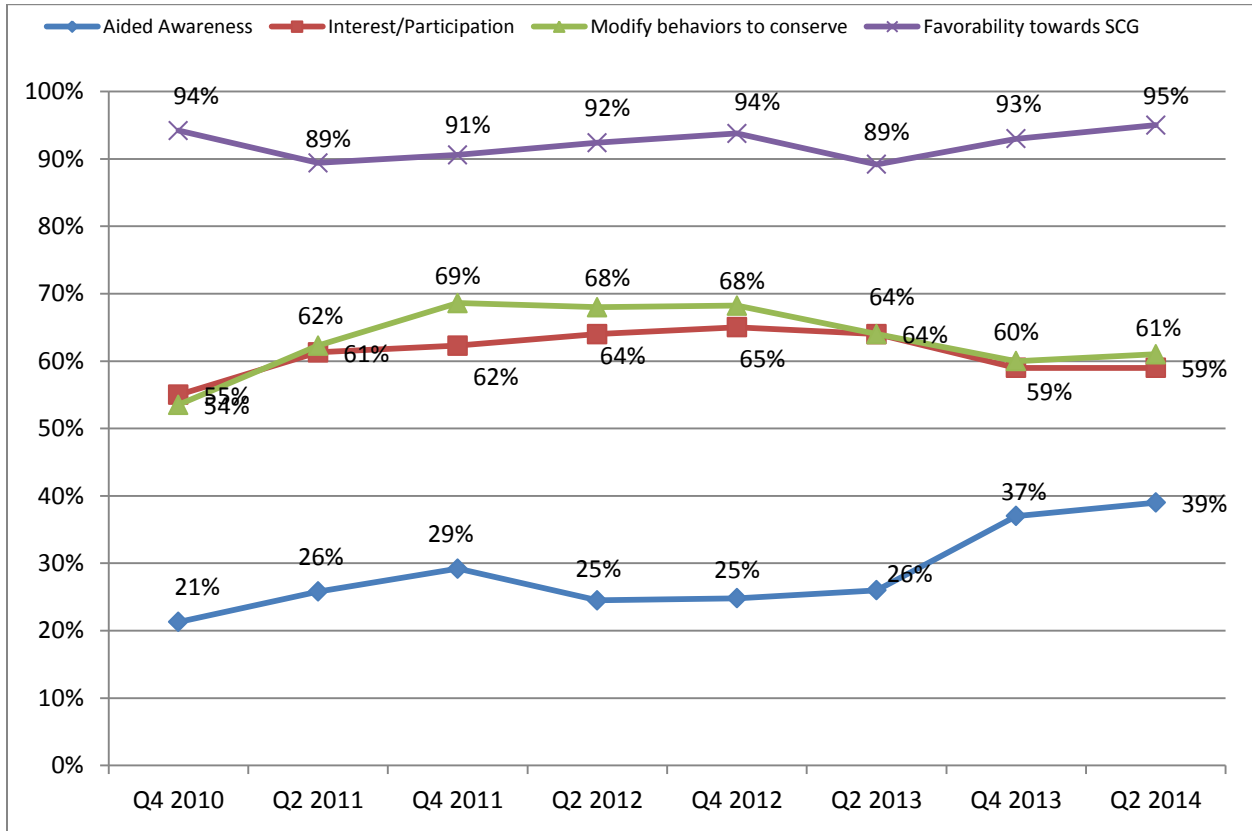
AM2a. Having access to your daily natural gas usage (therms/dollars) information would make you interested in viewing it more than once a month? (% Agree)

AM2b. Having access to your daily natural gas usage (therms/dollars) information would cause you to modify your behaviors to conserve natural gas? (% Agree)

Awareness about the Advanced Meter project among SoCalGas residential customers reached its highest point to date, 39 percent, in Q2 2014. The general upward trend over the past three quarters seems to reflect the increased volume of customer communications about the project as well as installations themselves. Of those customers who were aware of the project, 20 percent mentioned bill inserts as their source, and 23 percent mentioned that a meter had been installed at their home.

Customers' interest in viewing the hourly consumption data seems to fluctuate on a quarterly basis. In Q2 2014, interest in viewing the data decreased to 70 percent from 76 percent in Q1. Additionally, interest in conserving natural gas dropped slightly to 64 percent in the second quarter of 2014 after matching an all-time high of 68 percent in Q1 2014.

**Figure 2
Customer Information Study – Business Customers**



Questions:

IM1. How would you rate SoCalGas overall on a scale of 1 to 7 where 1 means very unfavorable and 7 means very favorable?

AM1. Are you aware of a new gas meter that transmits natural gas usage information remotely and more frequently from the meter to SoCalGas?

AM2a. Having access to your daily natural gas usage (therms/dollars) information would make you interested in viewing it more than once a month? (% Agree)

AM2b. Having access to your daily natural gas usage (therms/dollars) information would cause you to modify your behaviors to conserve natural gas? (% Agree)

Advanced Meter awareness among business customers edged up to 39 percent in the second quarter of 2014, reaching its highest level to date. Business customers’ interest in viewing the hourly consumption data remained steady at 59% following a drop the previous quarter. Intent to modify behaviors to conserve continues to hover in the low 60% range.

7.B Module Installation Outreach, Awareness and Satisfaction

In addition to the general outreach described in Chapter 6, SoCalGas’ customers are provided with communications covering the installation process and Advanced Meter-enabled programs and services. The Advanced Meter customer experience consists of five phases:

- Pre-Installation
- Installation
- Failed Installation Attempt (if necessary)
- Advanced Meter Billed, and
- Conservation Campaign

Customer awareness and satisfaction with the installation process remains high as described below. To ensure that its installation process is meeting customer needs, SoCalGas conducts post-installation surveys on an ongoing basis.

Within approximately seven days after modules were installed, phone surveys were conducted with residential and business customers to assess the effectiveness of Advanced Meter communications in generating awareness and preparing customers for installation, as well as satisfaction with the installer and the installation process. Four waves of residential post-installation research have been conducted. The pilot wave consisted of 203 residential customers; the second, third and fourth waves surveyed 403, 402, and 402 customers respectively. Two waves have been conducted with business customers – the first in September 2013 with 231 customers and the second in November 2013 with 300 customers. Going forward, post-installation surveys will be conducted annually with residential and business customers. The 2014 residential post-installation survey was conducted in June, and the business survey is scheduled for the September/October time frame.

The June 2014 residential post-installation study showed some changes in awareness and sources of awareness. While general Advanced Meter awareness remained steady at 60 percent, installation awareness increased to 51 percent, the highest level of the studies thus far, and a statistically significant increase from 42 percent, the level found in the June 2013 study. There was also a shift in customer recall percentages pertaining to the receipt of Advanced Meter communication materials in June 2014. The percentage of customers who recalled receiving the pre-installation letter dropped to 52 percent in June 2014, the lowest level recorded in the study, and a significant decrease from June 2013 at 69 percent. The percentage of customers who recalled receiving the successful installation door hanger was 57 percent and the FAQs card was 37 percent, a significant increase from June 2013, up from 45 percent and 31 percent respectively.

Residential customer satisfaction with the installers and the installation process remained steady, with no significant changes. Eighty-four percent of customers were satisfied with the installer, while 76 percent were satisfied with the installation process. About 96 percent of customers experienced a trouble-free installation in all three post-pilot waves of post-installation research.

Benefits of Advanced Meters were rated less appealing to customers in June 2014. All benefits, including the top rated benefits of saving money (78 percent), improved billing accuracy (75 percent) and helping the environment (74 percent) were rated lower than in June 2013. These lower ratings are tied to the underlying demographics represented in the June 2014 sample.

Additionally, the likelihood of changing behaviors due to an Advanced Meter installation was also lower in the current wave, with the likelihood to use information to conserve gas (46 percent) and manage energy costs (44 percent) both declining from 54 percent and 55 percent each in June 2013.

The additional gas usage information made available by Advanced Meters continues to have some impact on whether customers will sign up for My Account in order to access it. Thirty percent of customers who are not currently enrolled in My Account indicated they would sign up in order to access the information. This represents a slight, but not statistically significant, decrease from the 38 percent reported in June 2013.

Chapter 8 – Elevated Customer Inquiries and Deferral/Opt-Out Requests

To make inquiries about the Advanced Meter project, customers can contact either the SoCalGas Customer Contact Center (“CCC”) or the Advanced Meter Customer Information Center (“CIC”). The CCC addresses customer inquiries about any subject while the CIC usually handles appointment arrangements with customers to have their Advanced Meter installed. The CCC and the CIC can also process Advanced Meter “opt-out” requests.

There have been about 5,558 escalated inquiries escalated to customer support staff. The most common cause of the escalated inquiries is requests to defer/opt-out of the installation of the communications module. Although customers can call either the CCC or the CIC to have their deferral/opt-out requests recorded, some ask to speak to the Advanced Meter support staff. Often the questions revolve around safety and privacy concerns, as well as comments on the approved Advanced Meter Opt-Out Program fees. The number of escalated customer inquiries is very low, considering all the various Advanced Meter communications that have gone out to SoCalGas’ customers and the over 2.4 million pre-installation letters that have been mailed.

In Application (“A.”) 12-05-016, filed in May 2012, SoCalGas requested the CPUC to authorize an Advanced Meter Opt-Out Program to offer the option to *residential* customers who do not wish to have an Advanced Meter installed at their location. The application included a proposed interim fee structure for customers wishing to opt-out of Advanced Meter service. The requested fees were identical to those adopted for SCE, PG&E, and SDG&E.¹⁰

On February 27, 2014, the CPUC approved SoCalGas’ Advanced Meter Opt-Out Program and the following interim fee structure for residential customers:

- Non-CARE Customers: Initial fee of \$75.00 and \$10.00/month ongoing cost
- CARE Customers: Initial fee of \$10.00 and \$5.00/month ongoing cost

On March 19, 2014, SoCalGas’ Opt-Out Program became effective and the project team initiated efforts to inform employees of the opt-out program, as well as to begin revising any

¹⁰ D.12-02-014 (PG&E), D.12-04-018 (SCE), and D.12-04-019 (SDG&E).

impacted company communication materials. The approved fees are consistent with those adopted for the other California Investor-Owned Utilities (“IOUs”).¹¹

SoCalGas is also a party to A.11-03-014 (Opt-Out Phase 2 proceeding) and requested, in a filing on August 10, 2012, opt-out fees which would be put in place on a permanent basis. In this proceeding, all three electric companies also requested permanent opt-out fees. This matter is still pending before the Commission; however, a decision is expected before the end of 2014.

As illustrated in Table 13, there have been a total of 9,482 opt-out and deferral requests received from the project inception through June 30, 2014.

**Table 13
Customer Deferral/Opt-Out Inquiries**

Inquiry Type	Number Received	Explanation
Deferral Requests	8,331	The number of customers that prior to March 19, 2014, ¹² requested to defer from an Advanced Meter installation (territory-wide).
Opt-Out Requests	1,151	The number of customers that on/after March 19, 2014, requested to be included in SoCalGas’ approved Opt-Out program (territory-wide).

From the 9,482 opt-out and deferral requests, there have been 7,370 customers who requested a deferral/opt-out in response to the pre-installation letter through the Mass Installation area footprint only, as shown in Table 14. This is currently the best indication of the number of SoCalGas customers who are likely to opt-out.

**Table 14
Number of Customers Receiving Installation Notification Letter
Requesting Deferral of Advanced Meter Module**

Number of Letters Mailed	2,432,927
Number of Customers Requesting a Deferral/Opt-Out within the Mass Installation Footprint	7,370
Percentage of Deferral/Opt-Out within the Mass Installation Footprint	0.30%

As of June 30, 2014, approximately 0.30 percent of the 2,432,927 customers that have received a pre-installation letter have chosen to defer/opt out the installation of an Advanced Meter module. Given the size and diversity of the customer population included in the letters mailed

¹¹ D.12-02-014 (PG&E), D.12-04-018 (SCE), and D.12-04-019 (SDG&E).

¹² Pursuant to D.14-02-019, SoCalGas implemented its Advanced Meter Opt-Out Program effective March 19, 2014.

to date, SoCalGas still expects the percentage of customers who will opt-out to be within the planning assumption of 0.5 percent that SoCalGas forecasted in the opt-out proceedings referenced above.

When a customer requests to have the module installation deferred/opt-out, SoCalGas places a sticker on the customer's meter indicating the module's deferral status. This sticker informs SoCalGas personnel that a module should not be installed. Customers also receive a door hanger notifying them that the sticker has been placed on the meter.

Chapter 9 - Conservation Outreach Campaign

D.10-04-027 set a goal for SoCalGas to reduce residential gas consumption by one percent and placed reporting requirements on SoCalGas which are referenced in the Introduction to this Report.

In October 2013, SoCalGas initiated the first year of a multi-year outreach campaign aimed at reaching the one percent conservation goal contained in D.10-04-027. This conservation outreach campaign followed a "Test and Learn" approach and ran through March 2014. The overall strategy for the 2013-14 conservation campaign design was to include every "Billing Ready" Advanced Meter customer, leaving no customer behind, and increasing engagement levels in order to achieve behavioral change that will drive energy conservation of one percent or more. SoCalGas will incorporate the lessons learned from this initial campaign and adjust campaigns in future years to focus on the most promising customer segments and communication channels.

SoCalGas teamed with Nexant, formerly Freeman, Sullivan & Co., on several aspects of its 2013-14 conservation campaign implementation and evaluation. The primary objectives were as follows:

- 1) Develop a comprehensive conservation outreach plan incorporating a "Test and Learn" program development strategy with a focus on continuous assessment and improvement in the performance of feedback programs;
- 2) Perform an evaluation of the 2013-14 conservation campaign results; and
- 3) Provide recommendations and guidance for the proposed 2014-2015 "Test and Learn" plan.

9.A Conservation Customer Engagement and Results

The major features of the 2013-14 conservation campaign were:

- Bill Tracker Alerts ("BTAs") which provide customers weekly updates via email or SMS text messages about the likely amount of their gas bill
- Opower Home Energy Reports ("HERs") which compare an individual's gas usage to a group of customers who are similarly situated
- Continued promotion of SoCalGas' My Account website and new energy analysis tools made available to customers

As summarized in Figure 3 below, four of the residential “default” (auto-enrolled) customer conservation program treatments tested during this first campaign produced gas savings of 1.3 percent, showing progress toward the one percent conservation goal. Other treatments offered on an “opt-in” basis did not generate statistically significant reductions in gas usage.

Figure 3
Percent Reduction in Gas Usage
for Residential “Default” Conservation Treatments

Treatment	Percentage Reduction
Email-only HER	1.40%
Paper & Email HER	1.50%
Paper-only HER	1.60%
Default BTA	0.70%
Overall	1.30%

Please refer to Exhibit E, “**Evaluation of Southern California Gas Company’s 2013-2014 Conservation Campaign, July 2014**” provided by Nexant for a comprehensive evaluation of the results of this conservation campaign, as well as recommendations for SoCalGas’ 2014-15 conservation “Test and Learn” campaign approach.

As outlined in the recommendations contained within Nexant’s report, for the 2014-15 conservation campaign, high performing program design options from the 2013-2014 campaign will be retained and enhanced. Additionally, new program design alternatives will be tested. The goal is that, over the course of the Advanced Meter roll out, the most effective means for encouraging energy savings from information feedback will be identified and offered to customers. Some underperforming customer segments will be excluded from the next conservation campaign in order to allocate resources towards segments that have a higher propensity to change behavior and conserve energy.

Though some customers may be excluded from future targeted conservation campaigns, every SoCalGas customer receives a letter within 60 days of becoming Advanced Meter “Billing Ready” that outlines all the new energy information feedback options available to them enabled by an Advanced Meter. Customers who are “My Account” customer portal users also receive an email and a notification message within the My Account portal highlighting the new functionality.

For further details regarding the new Advanced Meter-enabled energy information feedback options rolled out to customers, please refer to prior Reports, as well as the Nexant evaluation referenced above and included herein as Exhibit E.

In addition to the 2013-2014 conservation “Test and Learn” campaign treatments and outcomes described above, following is an update regarding additional customer engagement activities and indicators that lead to behavioral change and energy conservation.

9.B Bill Tracker Alerts Enrollment

As of June 30, 2014, 129,814 SoCalGas customers are actively enrolled in Bill Tracker Alerts (see Figure 4 below, which provides cumulative enrollments-to-date as of both March 31 and June 30). These enrollments support the Advanced Meter project conservation savings goal as well as SoCalGas’ 2013-2014 Energy Efficiency behavior change program household participation goals.¹³

BTAs help customers maintain “top of mind” awareness of their natural gas consumption which is vital for creating the ongoing behavioral change necessary to achieve energy conservation.

The BTAs retention rate continues to remain very high at over 96 percent. Over 80 percent of the “unsubscribes” are due to system factors, such as customer account closures which results in a customer-initiated unsubscribe rate of less than one percent since the program’s inception. This is a strong indicator that customers value weekly email and/or SMS text messages that keep them apprised of their bill-to-date, projected next bill, last month’s bill, last year’s same month bill, and the number of days remaining in their current billing cycle.

Customer feedback regarding the BTAs offering has been very positive as well. A survey was conducted in June 2014 with customers who were enrolled in BTAs as of May 16, 2014. Just over half of all respondents have been receiving Bill Tracker Alerts for three months or less, with 29 percent receiving the alerts between four to six months and the remaining 18 percent for seven months or more. Customers reported high levels of engagement with the alerts, with 68 percent reporting that they “always” read them and 15 percent saying they “often” do.

In general, customers have given the alerts positive ratings. When asked to rate their agreement with a series of statements on a five point scale, ratings were highest for ease of reading (mean score 4.2), accuracy of the projected next bill information (4.0), usefulness of the bill to date information (4.0), and having greater awareness of their gas usage (3.9) since receiving the alerts. Statements regarding Bill Tracker helping them save money (3.3) and viewing the usage more frequently at SoCalGas.com (2.9) garnered the lowest agreement.

Customers were split based on their preferences for frequency of receiving the alerts. About 34 percent preferred the current weekly format, another 33 percent preferred the alerts twice a month, and 26 percent once a month. The remaining customers preferred receiving the alerts less than once a month. There is greater consensus on alert seasonality. Sixty-three percent wanted to keep the current year-round alert delivery schedule.

¹³ Pursuant to D.12-11-015, SoCalGas is also utilizing its Advanced Meter project to support its Energy Efficiency non-resource behavior goals, which contain a 5% behavioral target for residential households by 2014.

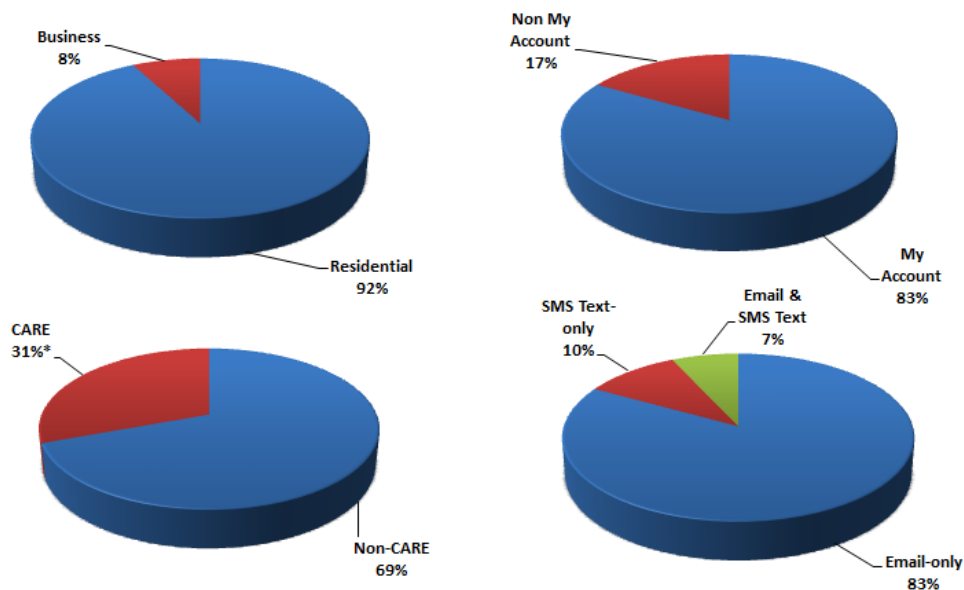
Figure 4
SoCalGas Bill Tracker Alerts Enrollment

Item	Count Through March 31, 2014	Count Through June 30, 2014
Total Subscriptions	58,029	135,117
Microsite – Auto Enrollment	28,184	102,825
Microsite – Online @ billtracker.socalgas.com	13,516	13,516
Microsite – Business Response Cards	7,601	7,611
Microsite – Hard-to-Reach Events	612	724
My Account/CSR – “Manage Alerts”	8,116	10,441
Total Unsubscriptions¹	2,364 (4%)	5,303 (4%)
By Customer (subscribed via Microsite)	379	686
By Customer (subscribed via My Account)	81	178
By System (i.e., Account Closed)	1,904	4,439
Total Active Subscriptions	55,665	129,814

¹ The majority of unsubscriptions are system-related (e.g., account closures); less than 1% are due to customers unsubscribing.

Figure 5 displays some of the customer characteristics of customers enrolled in Bill Tracker Alerts as of March 31, 2014.

Figure 5
SoCalGas Bill Tracker Alert Characteristics as of March 31, 2014



As of January 2014, California Alternative Rates for Energy (“CARE”) customers accounted for nearly 30 percent of SoCalGas’ customer base. The test cell population for this conservation campaign contained 32.35 percent CARE customers.

9.C My Account “Ways to Save” Tool Utilization

Another key indicator of enhanced customer engagement enabled or stimulated by Advanced Meter includes customer utilization of the SoCalGas.com, My Account-based “Ways to Save” online tools.

As described at length in prior Reports, SoCalGas has implemented new energy presentation and analysis tools within its My Account customer portal, as well as within the SoCalGas Mobile App. These Ways to Save tools provide SoCalGas customers the ability to:

- Analyze Advanced Meter-enabled hourly and daily gas usage and costs
- Compare their usage to that of similar homes or businesses
- Set a savings goal, complete an energy survey, and set up an associated action plan through “My Savings Plan”
- Compare previous monthly bills
- View a breakdown of their energy use by appliances or equipment type

Over the course of 2013 and through June 30, 2014, a total of 177,058 residential My Account users (both new and returning users) have engaged with the Ways to Save tool “My Savings Plan” web page from which users could view their personal energy use profile and initiate a savings plan, as well as navigate to view their hourly and daily gas usage and other energy usage and bill-related information.

9.D Hard-to-Reach Community Events

Consistent with the Commission’s direction to incorporate outreach strategies for all market segments, SoCalGas engaged PRM Consulting (“PRM”) to pilot a series of community events in the Imperial and Riverside counties to extend customer conservation outreach to hard-to-reach customers with Advanced Meters. The events were held from October 2013 through March 2014 and were aimed at increasing customer awareness of Advanced Meter-enabled Ways to Save online tools and obtaining enrollments in Bill Tracker Alerts.

PRM engaged local CBOs, FBOs, civic and business organizations. Participation in the local community events shown in Figure 6 below led to about 1,500 customer requesting enrollment in BTAs. PRM also established relationships with community newspapers, Spanish language newspapers and radio, and local schools to increase awareness of Advanced Meter-enabled programs and services.

Figure 6
PRM Community Events
October 2013 through March 2014

Date	Event	Location
10/24/2013	Indio Chamber Event	Indio
11/2/2013	Imperial Irrigation District: Lamp Exchange Event	Indio
11/9/2013	Brawley Chamber of Commerce: Cattle Call Parade	Brawley
11/16/2013	Imperial Irrigation District: Lamp Exchange Event	El Centro
11/16/2013	Honey Festival	Westmoreland
12/7/2013 - 12/8/2013	International Tamale Festival	Indio
12/13/2013	Xmas in a Small Town	Imperial
1/9/2013	Imperial Valley Joint Chambers: Business Showcase	Imperial
1/11/2014	City of La Quinta: Humana Health Fair	La Quinta
1/24/2014 - 1/26/2014	Indio Chamber of Commerce: Southwest Arts Festival	Indio
2/8/2014	Holtville Chamber of Commerce: Carrot Festival	Holtville
2/14/2014 - 2/23/2014	County of Riverside: 2014 Date Festival	Indio
2/15/2014	City of El Centro Mardi Gras	El Centro
2/28/2014 - 3/9/2014	45th District Agricultural Association: Mid-Winter Fair	Imperial

Exhibits

**Exhibit A
Mass Install Schedule**

		2014				2015				2016			
Staging Location		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Area A	Sun Valley												
	Northridge												
	Santa Monica												
	Bakersfield	Completed 11/2013											
	Visalia												
	Valencia												
	Oxnard												
	Santa Barbara												
	Nipomo												
Area B	Irwindale												
	Chino												
	San Bernardino												
Area C	South Gate												
	Los Angeles												
Area D	El Centro	Completed 5/2013											
	Indio	Completed 11/2013											
	Hemet												
	South OC												
	Perris												
	Anaheim												

Note: Planned warehouse closure dates are subject to change. Advanced Meter deployment will continue into 2017. Warehouse closures may be modified based on project close activities including transition to regular operations and workforce availability amongst Mass Installation and other SoCalGas personnel to perform remaining installations.

Exhibit B
List of Cities and Counties with Fully Installed DCUs

ADELANTO	DELANO	LA HABRA	RIALTO
ALHAMBRA	DESERT HOT SPRINGS	LA HABRA HEIGHTS	ROSEMEAD
ALISO VIEJO	DIAMOND BAR	LA MIRADA	SAN DIMAS
ARCADIA	DINUBA	LA PALMA	SAN FERNANDO
ARTESIA	DOWNEY	LA PUENTE	SAN GABRIEL
ATASCADERO	DUARTE	LA QUINTA	SAN JACINTO
BAKERSFIELD	EASTVALE	LAKE ELSINORE	SAN MARINO
BALDWIN PARK	EL MONTE	LAKESWOOD	SANTA FE SPRINGS
BANNING	FONTANA	LEMOORE	SANTA MARIA
BEAUMONT	FOUNTAIN VALLEY	LOMPOC	SCG Facility DCU
BELL	FRESNO COUNTY	LOS ALAMITOS	SHAFTER
BELL GARDENS	FULLERTON	LYNWOOD	SOLVANG
BELLFLOWER	GARDEN GROVE	MENIFEE	SOUTH EL MONTE
BEVERLY HILLS	GARDENA	MONROVIA	SOUTH GATE
BLYTHE	GLENDALE	MONTCLAIR	SOUTH PASADENA
BRAWLEY	GLENDORA	MONTEBELLO	STANTON
BREA	GOLETA	MONTEREY PARK	TAFT
BUELLTON	GRAND TERRACE	MORENO VALLEY	TEMECULA
BUENA PARK	GROVER BEACH	MURRIETA	TEMPLE CITY
BURBANK	HANFORD	NORCO	TULARE
CALEXICO	HAWAIIAN GARDENS	NORWALK	TWENTYNINE PALMS
CALIMESA	HAWTHORNE	ONTARIO	UPLAND
CALIPATRIA	HEMET	PALM DESERT	VERNON
CARSON	HIGHLAND	PALMDALE	VILLA PARK
CATHEDRAL CITY	HOLTVILLE	PARAMOUNT	VISALIA
CERRITOS	HUNTINGTON PARK	PASADENA	WALNUT
CHINO HILLS	IMPERIAL COUNTY	PERRIS	WASCO
CLAREMONT	INDIAN WELLS	PICO RIVERA	WEST COVINA
COACHELLA	INDIO	PLACENTIA	WESTMINSTER
COLTON	INDUSTRY	POMONA	WESTMORLAND
COMMERCE	INGLEWOOD	PORTERVILLE	WHITTIER
COMPTON	IRWINDALE	RANCHO	WILDOMAR
CORCORAN	JURUPA VALLEY	CUCAMONGA	YORBA LINDA
COVINA	KERN COUNTY	RANCHO MIRAGE	YUCAIPA
CUDAHY	LA CANADA	REDLANDS	YUCCA VALLEY
CYPRESS	FLINTRIDGE	REEDLEY	

Exhibit C
List of Organizations Contracted Through GeM Communications

American Indian Chamber of Commerce of California	Foodlink for Tulare County, Inc.
APAC Service Center,	Foothill Unity Center Inc.
Arcadia Chamber of Commerce	Foundation for Economic Stability
Armenian National Committee	Friends of Children's Museum
Artesia Chamber of Commerce	Fullerton Chamber of Commerce
Arts Council of Kern	Glendora Chamber of Commerce
Asian Business Association	Golden State YMCA
Asian Pacific Community Fund	Greater Bakersfield Chamber of Commerce
Azusa Chamber of Commerce	Greater Corona Chamber of Commerce
Banning Chamber of Commerce	Greater Corona Valley Chamber of Commerce
Beaumont Chamber of Commerce	Greater Lakewood Chamber of Commerce
Bell Gardens Chamber of Commerce	Greater Los Angeles African American Chamber of Commerce (GLAAAC)
Black Business Association	Greater Los Angeles Agency on Deafness, Inc. (GLAD)
Boys & Girls Club of San Geronio Pass	Hemet Chamber of Commerce
Boys & Girls of La Habra	Hemet San Jacinto Valley Chamber of Commerce
Brawley Chamber of Commerce	Housing and Opportunity Foundation of Kern
Brea Chamber of Commerce	Human Services Association
Burbank Chamber of Commerce	Indio Chamber of Commerce
California Small Business Association	Irwindale Chamber of Commerce
Campeños Unidos, Inc.	Kern County Black Chamber of Commerce
Casa Blanca Home of Neighborly Service	Kern County Hispanic Chamber of Commerce
Cerritos Regional Chamber Commerce	Kern Economic Development Corporation (KEDC)
City of West Covina	Kings Community Action Organization (KCAO)
Coachella Chamber of Commerce	Kings County Economic Corp
Coachella Valley Housing Coalition	Korean American Coalition
Community Action Partnership of Kern	La Cooperativa Campensina
Community Action Partnership of Orange County	La Habra Chamber
Community Services Employment Training, Inc.	La Quinta Chamber of Commerce
Corcoran Chamber of Commerce	Latin Business Association
Desert Hot Springs Chamber of Commerce	Los Angeles Conservation Corps
Desert Samaritans for Seniors (DSFS)	Mexican American Opportunity Foundation – Kern Cour
Don't Trash Me	Monrovia Chamber of Commerce
Duarte Chamber of Commerce	Moreno Valley Black Chamber of Commerce
East San Gabriel Center	Mujeres Activas en el Comercio Hispano (MACH)
East San Gabriel Valley Japanese Community Center	Murrietta Chamber of Commerce
Economic Development Corp. Tulare County	Neighborhood House of Calexico, Incorporated
Economic Development Corporation (EDC)	North of the River Chamber of Commerce
El Centro Chamber of Commerce	Norwalk Chamber of Commerce
El Monte/South El Monte Chamber of Commerce	OCCC Community Center
Escuela De La Raza Unida (ERU)	Oldtimers Foundation
Family Services Association	Pacific Islander
Filipino American Service Group, Inc. (FASG)	Palm Springs Chamber of commerce
FIND Food Bank	

Exhibit C
List of Organizations Contracted Through GeM Communications

Palm Springs Desert Area Chamber of Commerce	Temple City Chamber of Commerce
Pasadena Chamber of Commerce and Civic Association	The Casa Blanca Home of Neighborly Service
Proteus, Incorporated	The Greater Huntington Park Area Chamber of Commerce
Radio Bilingue Incorporated	Training Occupational Development Educating Communities ("TODEC") Legal Center, Perris
Regional Hispanic Chamber of Commerce	Tulare Chamber of Commerce
Riverside NAACP Branch #1059	Tulare Kings Hispanic Chamber of Commerce
San Dimas Chamber of Commerce	United Way of Tulare County
San Gabriel Valley Economic Partnership	Visalia Chamber of Commerce
Sierra Madre Chamber of Commerce	Visalia Emergency Aid Council
South Pasadena Chamber of Commerce	Whittier Area Chamber of Commerce
Southeast Community Development Corporation (SCDC)	Yucca Valley Chamber of Commerce
Success in Challenges, incorporated	
Temecula Chamber of Commerce	

Exhibit D
List of Community Events and Briefings

Meter Installation Warehouse	Installation Timeline	Area Represented	Public Affairs Region	Stakeholder / Audience	Communication Channel / Event	Description/ Organization Name (If Applicable)
Hemet	Q1 2014	Calimesa	South Inland	Community	Media	AM materials for City Newsletter
Anaheim	Q1 2014	Corona	South Inland	Community	1x1 Briefing	DCU Outreach - Corona Sierra Peak HOA (LH513-C)
Baldwin Park	Q2 2014	San Dimas	South Inland	Community	Community Meeting / Event	AM Outreach at Discover San Dimas and Chamber Open House
Anaheim	Q1 2014	Corona	South Inland	Community	Media	West Coast Media/Corona Magazine public outreach campaign
Perris	Q1 2014	Riverside	South Inland	Community	Community Meeting / Event	AM Outreach at 2014 Solar Energy Conference
Baldwin Park	Q2 2014	West Covina	South Inland	Community	Community Meeting / Event	AM Outreach at West Covina Community Health Fair
Various	Q1 2014	Various	South Inland	Community	Community Meeting / Event	2014 World Ag Fair
Baldwin Park	Q1 2014	Glendora	South Inland	Community	Community Meeting / Event	Glendora State of the City
Baldwin Park	Q2 2014	West Covina	South Inland	Community	Community Meeting / Event	AM presentation for Good Morning West Covina breakfast
Baldwin Park	Q1 2014	Glendora	South Inland	Community	Community Meeting / Event	AM presentation at Glendora Chamber Luncheon
Chino	Q1 2014	Upland	South Inland	Community	1x1 Briefing	DCU Outreach
Irwindale	Q2 2014	San Gabriel Valley / West Covina	South Inland	Community	Community Meeting / Event	AM presentation at East San Gabriel Valley Japanese Community Center
San Bernardino	Q1 2014	San Bernardino	South Inland	Community	Other	Inland Empire 66ers Baseball Club Public Outreach Campaign: Booth/Advertisements/Radio Broadcasts
Baldwin Park	Q1 2014	Irwindale	South Inland	Community	Community Meeting / Event	AM presentation at Good Morning Irwindale Chamber Breakfast
Indio	Q1 2014	Palm Desert	South Inland	Community	1x1 Briefing	DCU Outreach in Palm Desert Medium Issue
Baldwin Park	Q1 2014	Duarte	South Inland	Community	Community Meeting / Event	AM presentation at Duarte State of the School District
Perris	Q1 2014	Riverside	South Inland	Community	Community Meeting / Event	AM Outreach at League of California Cities - Riverside County Division General Meeting
Anaheim	Q1 2014	Riverside County/OC	South Inland	Community	Media	OC Register briefing on AM
Anaheim	Q1 2014	Riverside County	South Inland	Community	Community Meeting / Event	AM Outreach 2014 at Temescal Valley Town Hall meeting
Anaheim	Q1 2014	Corona	South Inland	Community	Community Meeting / Event	AM Outreach at Corona Business and Health Expo
Anaheim	Q1 2014	Riverside County	South Inland	Community	Community Meeting / Event	AM presentation at Riverside County Woodcrest Municipal Advisory Council
Baldwin Park	Q1 2014	Duarte	South Inland	Community	Community Meeting / Event	AM presentation at Good Morning Duarte Breakfast
Baldwin Park	Q2 2014	West Covina	South Inland	Community	City Council	AM presentation at West Covina City Council meeting
Baldwin Park	Q2 2014	West Covina	South Inland	Community	Community Meeting / Event	AM presentation at West Covina Senior Center
Perris	Q1 2014	Temecula	South Inland	Community	1x1 Briefing	DCU Outreach in Temecula
Chino	Q1 2014	Upland	South Inland	Community	1x1 Briefing	DCU Outreach in Upland - LI148-A
Hemet	Q2 2014	Hemet	South Inland	Community	Community Meeting / Event	AM Outreach at Hemet/Ramona Business Expo
Perris	Q1 2014	Temecula	South Inland	Community	1x1 Briefing	Updated: DCU Outreach - KG010-C in Temecula
Anaheim	Q1 2014	Eastvale	South Inland	Community	Community Meeting / Event	AM Outreach at Eastvale State of the City

**Exhibit D
List of Community Events and Briefings**

Meter Installation Warehouse	Installation Timeline	Area Represented	Public Affairs Region	Stakeholder / Audience	Communication Channel / Event	Description/ Organization Name (If Applicable)
Perris	Q1 2014	Redlands	South Inland	Community	Community Meeting / Event	AM Outreach at 2nd Annual Redlands Sustainability Festival
Baldwin Park	Q2 2014	West Covina	South Inland	Community	Community Meeting / Event	AM Outreach at West Covina Cherry Blossom Festival
Baldwin Park	Q2 2014	Duarte	South Inland	Community	Community Meeting / Event	AM presentation at Duarte Kiwanis Club
Chino	Q2 2014	Rancho Cucamonga	South Inland	Community	Community Meeting / Event	AM Outreach at Rancho Cucamonga Earth Day and Open House
Baldwin Park	Q2 2014	San Dimas	South Inland	Community	Community Meeting / Event	AM presentation at San Dimas Chamber Coffee Hour
Bakersfield	Q2 2014	Mentone/SB County	South Inland	Community	1x1 Briefing	DCU Outreach / San Bernardino County / KI222-C and KI262-D
Baldwin Park	Q2 2014	Diamond Bar	South Inland	Community	Community Meeting / Event	AM Outreach at Diamond Bar City Birthday Event
Perris	Q2 2014	Murrieta	South Inland	Community	Community Meeting / Event	AM Outreach at Murrieta Community Technology Expo
San Bernardino	Q2 2014	Highland	South Inland	Community	Community Meeting / Event	AM presentation at Highland Chamber Networking Luncheon
San Bernardino	Q2 2014	Highland	South Inland	Community	1x1 Briefing	DCU/Network Outreach in Highland
Various	Q2 2014	Various	South Inland	Community	Community Meeting / Event	AM Outreach at 2014 SCAG Regional Conference & General Assembly
Irwindale	Q2 2014	La Puente	South Inland	Community	Community Meeting / Event	AM Outreach at La Puente Community Block Party
San Bernardino	Q2 2014	San Bernardino	South Inland	Community	Community Meeting / Event	AM Outreach at 2014 Cinco de Mayo Festival
Baldwin Park	Q2 2014	Montclair	South Inland	Community	Community Meeting / Event	AM Outreach at USGBC-IE "Sustainable Communities: Green Homes, Healthy Living"
Perris	Q2 2014	Riverside	South Inland	Community	Community Meeting / Event	AM Outreach at 64th Annual NAACP Freedom Fund Awards Celebration
Perris	Q2 2014	Murrieta	South Inland	Community	1x1 Briefing	DCU Outreach in Murrieta
Various	Q2 2014	Various	South Inland	Community	Community Meeting / Event	AM Outreach at Contract Cities Conference
Baldwin Park	Q2 2014	Duarte	South Inland	Community	Community Meeting / Event	AM Outreach at Taste of Duarte and Business Expo
San Bernardino	Q2 2014	Loma Linda	South Inland	Community	1x1 Briefing	Loma Linda DCU outreach
Irwindale	Q2 2014	Arcadia	South Inland	Community	Community Meeting / Event	AM presentation at Arcadia Coordinating Community Council
Hemet	Q2 2014	Highland	South Inland	Community	1x1 Briefing	DCU outreach MEDIUM ISSUE
Baldwin Park	Q2 2014	Duarte	South Inland	Community	Community Meeting / Event	AM presentation at Duarte Public Services Commission
Perris	Q2 2014	Riverside	South Inland	Community	1x1 Briefing	DCU outreach for Riverside City DCU attachments
Perris	Q2 2014	Riverside	South Inland	Community	Community Meeting / Event	AM Outreach at Riverside Business Expo
Anaheim	Q2 2014	Riverside County	South Inland	Community	1x1 Briefing	DCU outreach for Riverside County sites
Irwindale	Q1 2014	West Covina	Los Angeles	Seniors, Limited English	One_on_One	East San Gabriel Valley Japanese Serv. Ctr.
Hemet	Q1 2014	Banning	South Inland Empire	Limited Income, Limited English, General Public	One_on_One	Boys and Girls Club of San Gorgonio
Hemet	Q1 2014	Riverside	South Inland Empire	Seniors, Physically Challenged, Limited	One_on_One	Foundation for Economic Stability - Riverside Community Action Partnership

Exhibit D
List of Community Events and Briefings

Meter Installation Warehouse	Installation Timeline	Area Represented	Public Affairs Region	Stakeholder / Audience	Communication Channel / Event	Description/ Organization Name (If Applicable)
				Income, Limited English, Rural, General Public		
Hemet	Q1 2014	Riverside	South Inland Empire	Seniors, General Public, other CBO(s), Faith Based Organizations - FBO(s)	One_on_One	Riverside NAACP
Hemet	Q1 2014	Riverside	South Inland Empire	Seniors, Limited Income, Small Business, General Public	One_on_One	Riverside NAACP
Hemet	Q1 2014	Riverside	South Inland Empire	Seniors, Physically Challenged, Limited Income, Limited English, General Public, other CBO(s)	One_on_One	Foundation for Economic Stability - Riverside Community Action Partnership
Irwindale	Q1 2014	West Covina	Los Angeles	Seniors, Physically Challenged, Limited Income, Limited English	One_on_One	East San Gabriel Valley Japanese Serv. Ctr.
Visalia	Q1 2014	Tulare	Northern		Meeting/Event	United Way of Tulare County
Visalia	Q1 2014	Tulare	Northern	Rural	Meeting/Event	United Way of Tulare County
Irwindale	Q1 2014	West Covina	Los Angeles	Seniors, Physically Challenged, Limited Income, Limited English, General Public	Meeting/Event	East San Gabriel Valley Japanese Serv. Ctr.
Hemet	Q1 2014	Moreno Valley	South Inland Empire	Seniors, Physically Challenged, Limited Income, Limited English, General Public	Meeting/Event	Family Services Association Mead Valley Community Center
Visalia	Q1 2014	Visalia	Northern	Seniors, Physically Challenged, Limited Income, Limited English, Rural, General Public	Meeting/Event	Community Services EMP Training
Visalia	Q1 2014	Visalia	Northern	Seniors, Limited Income, Limited English, Rural, General Public	Meeting/Event	Community Services EMP Training
Hemet	Q1 2014	Riverside	South Inland Empire	Seniors, Physically	Meeting/Event	Foundation for Economic Stability - Riverside Community Action

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List of Community Events and Briefings

Meter Installation Warehouse	Installation Timeline	Area Represented	Public Affairs Region	Stakeholder / Audience	Communication Channel / Event	Description/ Organization Name (If Applicable)
				Challenged, Limited Income, Limited English, Rural, General Public, other CBO(s)		Partnership
Hemet	Q1 2014	Riverside	South Inland Empire	Seniors, Physically Challenged, Limited Income, Limited English, Rural, General Public	Meeting/Event	Foundation for Economic Stability - Riverside Community Action Partnership
Hemet	Q1 2014	Riverside	South Inland Empire	Seniors, Physically Challenged, Limited Income, Limited English, General Public	Meeting/Event	Foundation for Economic Stability - Riverside Community Action Partnership
Hemet	Q1 2014	Indio	South Inland Empire	Seniors, Physically Challenged, Limited Income, Limited English	Meeting/Event	Coachella Valley Housing Coalition
Hemet	Q1 2014	Riverside	South Inland Empire	Seniors, Small Business, General Public	Meeting/Event	Riverside NAACP
Hemet	Q1 2014	Riverside	South Inland Empire	Seniors, Limited Income, General Public	Meeting/Event	Riverside NAACP
Hemet	Q1 2014	Banning	South Inland Empire	Seniors, Limited Income, General Public	Meeting/Event	Boys and Girls Club of San Geronio
Hemet	Q1 2014	Riverside	South Inland Empire	Seniors, Physically Challenged, Limited Income, Limited English, Rural, other CBO(s)	Meeting/Event	Foundation for Economic Stability - Riverside Community Action Partnership
Visalia	Q1 2014	Visalia	Northern	Seniors, Physically Challenged, Limited Income, Limited English, Rural	Meeting/Event	Community Services EMP Training
Visalia	Q1 2014	Tulare	Northern	General Public	Meeting/Event	United Way of Tulare County
Visalia	Q1 2014	Tulare	Northern	Limited Income, Limited English, General Public	Meeting/Event	United Way of Tulare County
Visalia	Q1 2014	Tulare	Northern	Seniors, Limited Income, Limited English, General Public	Meeting/Event	United Way of Tulare County

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List of Community Events and Briefings

Meter Installation Warehouse	Installation Timeline	Area Represented	Public Affairs Region	Stakeholder / Audience	Communication Channel / Event	Description/ Organization Name (If Applicable)
Visalia	Q1 2014	Tulare	Northern	Limited Income, Rural	Meeting/Event	United Way of Tulare County
Visalia	Q1 2014	Tulare	Northern	Small Business, other CBO(s)	Meeting/Event	United Way of Tulare County
Visalia	Q1 2014	Tulare	Northern	Limited Income, General Public	Meeting/Event	United Way of Tulare County
Visalia	Q1 2014	Tulare	Northern	Limited English, other CBO(s)	Meeting/Event	United Way of Tulare County
Hemet	Q1 2014	Banning	South Inland Empire	Seniors, Small Business, other CBO(s)	Meeting/Event	Boys and Girls Club of San Geronio
Irwindale	Q1 2014	Monrovia	Los Angeles	General Public	Meeting/Event	Foothill Unity Center
Irwindale	Q1 2014	Monrovia	Los Angeles	Seniors	Meeting/Event	Foothill Unity Center
Visalia	Q1 2014	Visalia	Northern	Seniors, Low Income, Limited English, General Public	Communication	Food Link of Tulare County
Visalia	Q1 2014	Visalia	Northern	Seniors, Physically Challenged, Low Income, Limited English, Rural, General Public	Communication	Food Link of Tulare County
Visalia	Q1 2014	Tulare	Northern	General Public	Communication	Economic Development Corp. of Tulare County
Visalia	Q1 2014	Hanford	Northern	Seniors, Physically Challenged, Low Income, Limited English	Communication	Kings Community Action Organization
Hemet	Q1 2014	Riverside	South Inland Empire	Seniors, Physically Challenged, Low Income, Limited English, Rural, General Public	Communication	Foundation for Economic Stability - Riverside Community Action Partnership
Hemet	Q1 2014	Riverside	South Inland Empire	Seniors, Low Income, Small Business, General Public	Communication	Riverside NAACP
Hemet	Q1 2014	Riverside	South Inland Empire	Seniors, Physically Challenged, Low Income, Small Business, Limited English, Rural, General Public	Communication	Foundation for Economic Stability - Riverside Community Action Partnership
Visalia	Q1 2014	Visalia	Northern	Seniors, Physically	Communication	Food Link of Tulare County

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List of Community Events and Briefings**

Meter Installation Warehouse	Installation Timeline	Area Represented	Public Affairs Region	Stakeholder / Audience	Communication Channel / Event	Description/ Organization Name (if Applicable)
				Challenged, Low Income, Small Business, Limited English, General Public		
Visalia	Q1 2014	Visalia	Northern	Seniors, Physically Challenged, Low Income, Small Business, Limited English, Rural, General Public	Communication	Food Link of Tulare County
Irwindale	Q1 2014	West Covina	Los Angeles	Seniors, Physically Challenged, Low Income, Limited English, Other CBO(s)	Mail/Call	East San Gabriel Valley Japanese Serv. Ctr.
Visalia	Q1 2014	Tulare	Northern	Small Business, Rural	Mail/Call	Economic Development Corp. of Tulare County
Hemet	Q1 2014	Riverside	South Inland Empire	Seniors, Physically Challenged, Low Income, Limited English, Rural, General Public	Mail/Call	Foundation for Economic Stability - Riverside Community Action Partnership
Visalia	Q1 2014	Tulare	Northern	General Public	Mail/Call	Economic Development Corp. of Tulare County
Hemet	Q1 2014	Riverside	South Inland Empire	Seniors, General Public	Mail/Call	Riverside NAACP
Hemet	Q1 2014	Banning	South Inland Empire	Seniors, Small Business, General Public	Mail/Call	Boys and Girls Club of San Geronio
Hemet	Q1 2014	Riverside	South Inland Empire	Seniors, Physically Challenged, Low Income, Limited English, Rural, General Public	Mail/Call	Foundation for Economic Stability - Riverside Community Action Partnership
Irwindale	Q1 2014	West Covina	Los Angeles	Seniors, Physically Challenged, Low Income, Small Business, Limited English, Other CBO(s)	Mail/Call	East San Gabriel Valley Japanese Serv. Ctr.
Visalia	Q1 2014	Tulare	Northern	Seniors, Physically Challenged, Low Income, Limited English, Rural, General Public	Mail/Call	United Way of Tulare County

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List of Community Events and Briefings

Meter Installation Warehouse	Installation Timeline	Area Represented	Public Affairs Region	Stakeholder / Audience	Communication Channel / Event	Description/ Organization Name (If Applicable)
Hemet	Q1 2014	Hemet	South Inland Empire		Chamber	Hemet/San Jacinto Chamber of Commerce
Hemet	Q1 2014	Hemet	South Inland Empire	Non Profit & Faith Based Organization Representatives	Chamber	Hemet/San Jacinto Chamber of Commerce
Visalia	Q1 2014	Visalia	Northern		Chamber	Visalia Chamber of Commerce
Hemet	Q1 2014	Beaumont	South Inland Empire		Chamber	Beaumont Chamber of Commerce
Irwindale	Q1 2014	West Covina	Los Angeles	Senior Population	Chamber	City of West Covina -West Covina Business Assn.
Irwindale	Q1 2014	West Covina	Los Angeles	West Covina Residents	Chamber	City of West Covina -West Covina Business Assn.
Irwindale	Q1 2014	West Covina	Los Angeles		Chamber	City of West Covina -West Covina Business Assn.
Visalia	Q1 2014	Visalia	Northern	local community	Chamber	Visalia Chamber of Commerce
Irwindale	Q1 2014	Glendora	Los Angeles		Chamber	Glendora Chamber of Commerce
Irwindale	Q1 2014	Glendora	Los Angeles	Community	Chamber	Glendora Chamber of Commerce
Irwindale	Q1 2014	Irwindale	Los Angeles		Chamber	Irwindale Chamber of Commerce
Visalia	Q1 2014	Tulare	Northern		Chamber	Tulare Chamber of Commerce
Visalia	Q1 2014	Tulare	Northern	Civic Minded Individuals	Chamber	Tulare Chamber of Commerce
Visalia	Q1 2014	Tulare	Northern	Civic Minded Individuals Non Profits Corporations	Chamber	Tulare Chamber of Commerce
Visalia	Q1 2014	Tulare	Northern	Civic Minded Non Profits	Chamber	Tulare Chamber of Commerce
Irwindale	Q1 2014	Azuza	Los Angeles		Chamber	Azuza Chamber of Commerce
Irwindale	Q1 2014	San Dimas	Los Angeles		Chamber	San Dimas Chamber of Commerce
Irwindale	Q1 2014	San Dimas	Los Angeles	General Public	Chamber	San Dimas Chamber of Commerce
Hemet	Q1 2014	Hemet	South Inland Empire	Residents	Chamber	Hemet/San Jacinto Chamber of Commerce
Los Angeles	Q1 2014	Los Angeles	Los Angeles		Chamber	Black Business Association
Visalia	Q1 2014	Tulare	Northern	Civic Minded Members Non Profits	Chamber	Tulare Chamber of Commerce
Los Angeles	Q1 2014	Los Angeles	Los Angeles		Chamber	Mujeres Activas en el Comercio Hispano
Anaheim	Q1 2014	Corona	South Inland Empire	Elected officials, business professionals	Chamber	Greater Corona Chamber of Commerce
Anaheim	Q1 2014	Corona	South Inland Empire	Metro	Chamber	Greater Corona Chamber of Commerce
Anaheim	Q1 2014	Corona	South Inland Empire		Chamber	Greater Corona Chamber of Commerce
Anaheim	Q1 2014	Corona	South Inland Empire	Families	Chamber	Greater Corona Chamber of Commerce
Hemet	Q1 2014	Banning	South Inland Empire	San Bernardino County	Chamber	Banning Chamber of Commerce
Hemet	Q1 2014	Banning	South Inland Empire		Chamber	Banning Chamber of Commerce
Irwindale	Q1 2014	Glendora	Los Angeles	Community Members	Chamber	Glendora Chamber of Commerce
Irwindale	Q1 2014	Temple City	Los Angeles	Residents	Chamber	Temple City Chamber of Commerce

**Exhibit D
List of Community Events and Briefings**

Meter Installation Warehouse	Installation Timeline	Area Represented	Public Affairs Region	Stakeholder / Audience	Communication Channel / Event	Description/ Organization Name (If Applicable)
Irwindale	Q1 2014	San Dimas	Los Angeles	General Membership	Chamber	San Dimas Chamber of Commerce
Irwindale	Q1 2014	San Dimas	Los Angeles	General Membership and General Public	Chamber	San Dimas Chamber of Commerce
Visalia	Q1 2014	Visalia	Northern	city residents	Chamber	Visalia Chamber of Commerce
Hemet	Q1 2014	Hemet	South Inland Empire	Local residents	Chamber	Hemet/San Jacinto Chamber of Commerce
Irwindale	Q1 2014	West Covina	Los Angeles	Households in West Covina and neighboring cities	Chamber	City of West Covina - West Covina Business Assn.
Irwindale	Q1 2014	Duarte	Los Angeles	Every business and residence in Duarte and Bradbury communities	Chamber	Duarte Chamber
Irwindale	Q1 2014	Duarte	Los Angeles		Chamber	Duarte Chamber
Visalia	Q1 2014	Tulare	Northern	Nonprofits civic minded individuals	Chamber	Tulare Chamber of Commerce
Visalia	Q1 2014	Tulare	Northern	Nonprofit civic minded individuals	Chamber	Tulare Chamber of Commerce
Visalia	Q1 2014	Tulare	Northern	Nonprofit civic minded	Chamber	Tulare Chamber of Commerce
Visalia	Q1 2014	Tulare	Northern	Nonprofits civic minded individuals general public	Chamber	Tulare Chamber of Commerce
Irwindale	Q1 2014	Temple City	Los Angeles	City Councilmembers	Chamber	Temple City Chamber of Commerce
Irwindale	Q1 2014	Temple City	Los Angeles		Chamber	Temple City Chamber of Commerce
Irwindale	Q1 2014	Temple City	Los Angeles	residents, city staff	Chamber	Temple City Chamber of Commerce
South Gate	Q1 2014	Long Beach	Los Angeles		Chamber	Regional Hispanic Chamber of Commerce
Hemet	Q1 2014	Banning	South Inland Empire	Calimesa Cabezon	Chamber	Banning Chamber of Commerce
Hemet	Q1 2014	Banning	South Inland Empire	Cabezon	Chamber	Banning Chamber of Commerce
Los Angeles	Q1 2014	Los Angeles	Los Angeles		Chamber	Asian Bus. Assn., L.A.
Visalia	Q2 2014	Visalia	Northern	Seniors, Physically Challenged, Limited Income, Limited English, Rural, General Public	One_on_One	Proteus Inc.
Hemet	Q2 2014	Riverside	South Inland Empire	Seniors, Physically Challenged, Limited Income, Limited English, Rural, General Public	One_on_One	Foundation for Economic Stability - Riverside Community Action Partnership

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List of Community Events and Briefings**

Meter Installation Warehouse	Installation Timeline	Area Represented	Public Affairs Region	Stakeholder / Audience	Communication Channel / Event	Description/ Organization Name (If Applicable)
Visalia	Q2 2014	Visalia	Northern	Seniors, Physically Challenged, Limited Income, Small Business, Limited English, Rural, General Public, other CBO(s)	One_on_One	Proteus Inc.
Anaheim	Q2 2014	Garden Grove	Orange County	Seniors, Physically Challenged, Limited Income, Limited English	One_on_One	Community Action Partnership of Orange County
Anaheim	Q2 2014	La Habra	Orange County	Limited English, General Public	One_on_One	Boys & Girls Clubs of La Habra
Irwindale	Q2 2014	West Covina	Los Angeles	Seniors, Limited Income, Limited English	One_on_One	East San Gabriel Valley Japanese Serv. Ctr.
Visalia	Q2 2014	Visalia	Northern	Limited English, General Public	One_on_One	Golden State YMCA
Hemet	Q1 2014	Riverside	South Inland Empire	Seniors, Physically Challenged, Limited Income, Limited English, Rural, General Public, other CBO(s)	Meeting/Events	Foundation for Economic Stability - Riverside Community Action Partnership
Hemet	Q1 2014	Riverside	South Inland Empire	Seniors, Limited Income, General Public	Meeting/Events	Riverside NAACP
Hemet	Q2 2014	Riverside	South Inland Empire	Seniors	Meeting/Events	Riverside NAACP
Visalia	Q2 2014	Tulare	Northern	Limited Income	Meeting/Events	United Way of Tulare County
Visalia	Q2 2014	Tulare	Northern	Limited Income, Rural	Meeting/Events	United Way of Tulare County
Visalia	Q2 2014	Tulare	Northern	Limited Income, Limited English, Rural, General Public	Meeting/Events	United Way of Tulare County
Visalia	Q2 2014	Tulare	Northern	General Public	Meeting/Events	United Way of Tulare County
Visalia	Q2 2014	Tulare	Northern	Rural	Meeting/Events	United Way of Tulare County
Visalia	Q2 2014	Tulare	Northern	Seniors, Limited English	Meeting/Events	United Way of Tulare County
Visalia	Q2 2014	Tulare	Northern	Limited Income, Limited English	Meeting/Events	United Way of Tulare County
Visalia	Q2 2014	Tulare	Northern	other CBO(s)	Meeting/Events	United Way of Tulare County
Visalia	Q2 2014	Visalia	Northern	Seniors, Physically	Meeting/Events	Proteus Inc.

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List of Community Events and Briefings

Meter Installation Warehouse	Installation Timeline	Area Represented	Public Affairs Region	Stakeholder / Audience	Communication Channel / Event	Description/ Organization Name (If Applicable)
				Challenged, Limited English, General Public		
Visalia	Q2 2014	Visalia	Northern	Limited Income, Limited English, Faith Based Organizations - FBO(s)	Meeting/Events	Proteus Inc.
Visalia	Q2 2014	Visalia	Northern	Limited English, Rural, General Public	Meeting/Events	Proteus Inc.
Visalia	Q2 2014	Visalia	Northern	Seniors, Limited Income, Limited English	Meeting/Events	Proteus Inc.
Visalia	Q2 2014	Visalia	Northern	Limited Income, Limited English, General Public	Meeting/Events	Proteus Inc.
Visalia	Q2 2014	Visalia	Northern	Limited English, General Public	Meeting/Events	Proteus Inc.
Visalia	Q2 2014	Visalia	Northern	Limited Income	Meeting/Events	Proteus Inc.
Visalia	Q2 2014	Visalia	Northern	General Public	Meeting/Events	Proteus Inc.
Visalia	Q2 2014	Visalia	Northern	Limited Income, Limited English, Rural	Meeting/Events	Proteus Inc.
Visalia	Q2 2014	Visalia	Northern	Rural, General Public	Meeting/Events	Proteus Inc.
Visalia	Q2 2014	Visalia	Northern	Seniors, Physically Challenged, Limited Income, Limited English, Rural, General Public	Meeting/Events	Community Services EMP Training
Visalia	Q2 2014	Visalia	Northern	Seniors, Physically Challenged, Small Business, General Public	Meeting/Events	Visalia Emergency Aid Ciybcuk
Hemet	Q2 2014	Moreno Valley	South Inland Empire	Seniors, Physically Challenged, Limited Income, Limited English, General Public	Meeting/Events	Family Services Association Mead Valley Community Center
Visalia	Q1 2014	Hanford	Northern	Seniors, Physically Challenged, Limited Income, Limited English, Rural	Meeting/Events	Kings Community Action Organization
Visalia	Q1 2014	Hanford	Northern	Limited Income, Limited English, Rural	Meeting/Events	Kings Community Action Organization

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List of Community Events and Briefings

Meter Installation Warehouse	Installation Timeline	Area Represented	Public Affairs Region	Stakeholder / Audience	Communication Channel / Event	Description/ Organization Name (If Applicable)
Visalia	Q2 2014	Hanford	Northern	Seniors, Physically Challenged, Limited Income, Small Business, Limited English, Rural, General Public	Meeting/Events	Kings Community Action Organization
Visalia	Q2 2014	Tulare	Northern	Seniors, Physically Challenged	Meeting/Events	United Way of Tulare County
Hemet	Q2 2014	Riverside	South Inland Empire	Seniors, Physically Challenged, Limited Income, Limited English, General Public, other CBO(s)	Meeting/Events	Foundation for Economic Stability - Riverside Community Action Partnership
Hemet	Q2 2014	Riverside	South Inland Empire	Seniors, Limited Income, Limited English, Rural, General Public, other CBO(s)	Meeting/Events	Foundation for Economic Stability - Riverside Community Action Partnership
Hemet	Q2 2014	Riverside	South Inland Empire	Seniors, Limited Income, Limited English, General Public, other CBO(s)	Meeting/Events	Foundation for Economic Stability - Riverside Community Action Partnership
Hemet	Q2 2014	Riverside	South Inland Empire	other CBO(s)	Meeting/Events	Foundation for Economic Stability - Riverside Community Action Partnership
Perris	Q1 2014	Perris	South Inland Empire	Seniors, Limited Income, Limited English	Meeting/Events	Todec Legal Center: Perris
Perris	Q1 2014	Perris	South Inland Empire	Limited Income, Limited English	Meeting/Events	Todec Legal Center: Perris
Perris	Q1 2014	Perris	South Inland Empire	Seniors, Limited Income, Limited English, Rural	Meeting/Events	Todec Legal Center: Perris
Perris	Q2 2014	Perris	South Inland Empire	Seniors, Limited Income, Limited English	Meeting/Events	Todec Legal Center: Perris
Perris	Q2 2014	Perris	South Inland Empire	Seniors, Limited Income, Limited English, Rural	Meeting/Events	Todec Legal Center: Perris
Visalia	Q2 2014	Visalia	Northern	Seniors, Physically Challenged, Limited Income, Limited English, Rural, General Public	Meeting/Events	Proteus Inc.

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Meter Installation Warehouse	Installation Timeline	Area Represented	Public Affairs Region	Stakeholder / Audience	Communication Channel / Event	Description/ Organization Name (If Applicable)
Visalia	Q2 2014	Visalia	Northern	Limited Income, Limited English, Rural, other CBO(s)	Meeting/Events	Proteus Inc.
Visalia	Q2 2014	Visalia	Northern	Seniors, Limited Income, Limited English, Rural, other CBO(s)	Meeting/Events	Proteus Inc.
Visalia	Q2 2014	Visalia	Northern	Limited Income, Limited English, General Public, other CBO(s)	Meeting/Events	Proteus Inc.
Visalia	Q2 2014	Visalia	Northern	other CBO(s)	Meeting/Events	Proteus Inc.
Hemet	Q1 2014	Indio	South Inland Empire	Seniors, Physically Challenged, Limited Income, Limited English	Meeting/Events	Coachella Valley Housing Coalition
Hemet	Q1 2014	Indio	South Inland Empire	Seniors, Physically Challenged, Limited Income, Limited English, General Public	Meeting/Events	Coachella Valley Housing Coalition
Visalia	Q2 2014	Visalia	Northern	Limited Income, Limited English, other CBO(s)	Meeting/Events	Proteus Inc.
Visalia	Q2 2014	Visalia	Northern	Limited Income, Limited English	Meeting/Events	Proteus Inc.
Visalia	Q2 2014	Visalia	Northern	Limited Income, Limited English, Rural, General Public, other CBO(s)	Meeting/Events	Proteus Inc.
Visalia	Q2 2014	Visalia	Northern	Seniors, Physically Challenged, Limited Income, Limited English, Rural, General Public, other CBO(s)	Meeting/Events	Proteus Inc.
Visalia	Q2 2014	Visalia	Northern	Limited Income, Limited English, Rural, General Public, other CBO(s), Faith Based Organizations - FBO(s)	Meeting/Events	Proteus Inc.
Visalia	Q2 2014	Tulare	Northern	Limited Income, General	Meeting/Events	United Way of Tulare County

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				Public		
Anaheim	Q2 2014	Santa Ana	Orange County	Seniors, Limited Income	Meeting/Events	Pacific Islander Health Partner
Anaheim	Q2 2014	Santa Ana	Orange County	Limited Income, Limited English, Faith Based Organizations - FBO(s)	Meeting/Events	Pacific Islander Health Partner
Anaheim	Q2 2014	Santa Ana	Orange County	Limited Income	Meeting/Events	Pacific Islander Health Partner
Anaheim	Q2 2014	Santa Ana	Orange County	Seniors, Limited Income, Limited English	Meeting/Events	Pacific Islander Health Partner
Anaheim	Q2 2014	Santa Ana	Orange County	Seniors, Limited Income, Small Business	Meeting/Events	Pacific Islander Health Partner
Anaheim	Q2 2014	La Habra	Orange County	General Public	Meeting/Events	Friends of the Children
Anaheim	Q2 2014	Santa Ana	Orange County	Seniors, Limited Income, General Public	Meeting/Events	Pacific Islander Health Partner
Anaheim	Q2 2014	La Habra	Orange County	General Public	Meeting/Events	Boys & Girls Clubs of La Habra
Anaheim	Q2 2014	La Habra	Orange County	Limited Income, Limited English	Meeting/Events	Boys & Girls Clubs of La Habra
Anaheim	Q2 2014	La Habra	Orange County	Limited Income, Small Business, General Public	Meeting/Events	Boys & Girls Clubs of La Habra
Visalia	Q2 2014	Visalia	Northern	General Public	Meeting/Events	Golden State YMCA
Hemet	Q2 2014	Banning	South Inland Empire	Seniors, Limited Income, Small Business, Limited English, General Public	Meeting/Events	Boys and Girls Club of San Geronio
Hemet	Q2 2014	Banning	South Inland Empire	Seniors, Limited Income, Limited English, General Public	Meeting/Events	Boys and Girls Club of San Geronio
Hemet	Q2 2014	Riverside	South Inland Empire	Seniors, Physically Challenged, Limited Income, Limited English, Rural, General Public, other CBO(s)	Meeting/Events	Foundation for Economic Stability - Riverside Community Action Partnership
Hemet	Q2 2014	Riverside	South Inland Empire	Seniors, Limited Income, Limited English, General Public	Meeting/Events	Foundation for Economic Stability - Riverside Community Action Partnership
Visalia	Q1 2014	Tulare	Northern	Physically Challenged, Limited Income	Meeting/Events	United Way of Tulare County

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Meter Installation Warehouse	Installation Timeline	Area Represented	Public Affairs Region	Stakeholder / Audience	Communication Channel / Event	Description/ Organization Name (If Applicable)
Visalia	Q1 2014	Tulare	Northern	Limited Income	Meeting/Events	United Way of Tulare County
Visalia	Q1 2014	Tulare	Northern	Limited Income, Limited English	Meeting/Events	United Way of Tulare County
Visalia	Q1 2014	Tulare	Northern	Limited Income, Limited English, General Public	Meeting/Events	United Way of Tulare County
Visalia	Q1 2014	Tulare	Northern	General Public	Meeting/Events	United Way of Tulare County
Visalia	Q1 2014	Tulare	Northern	Rural	Meeting/Events	United Way of Tulare County
Visalia	Q1 2014	Tulare	Northern	other CBO(s)	Meeting/Events	United Way of Tulare County
Visalia	Q1 2014	Tulare	Northern	Limited Income, Limited English, Rural	Meeting/Events	United Way of Tulare County
Visalia	Q2 2014	Tulare	Northern	Limited Income, Limited English, Rural	Meeting/Events	United Way of Tulare County
Visalia	Q2 2014	Visalia	Northern	Limited Income, General Public, other CBO(s)	Meeting/Events	Proteus Inc.
Visalia	Q2 2014	Visalia	Northern	Limited Income, other CBO(s)	Meeting/Events	Proteus Inc.
Anaheim	Q2 2014	Garden Grove	Orange County	Seniors, Limited Income, Limited English	Meeting/Events	Community Action Partnership of Orange County
Anaheim	Q2 2014	Garden Grove	Orange County	Seniors, Physically Challenged, Limited Income, Limited English	Meeting/Events	Community Action Partnership of Orange County
Anaheim	Q2 2014	La Habra	Orange County	Seniors, Physically Challenged, Limited Income, Small Business, Limited English, Faith Based Organizations - FBO(s)	Meeting/Events	Boys & Girls Clubs of La Habra
Anaheim	Q2 2014	Santa Ana	Orange County	General Public	Meeting/Events	Pacific Islander Health Partner
Perris	Q2 2014	Perris	South Inland Empire	Seniors, Physically Challenged, Limited Income	Meeting/Events	Todec Legal Center: Perris
Visalia	Q2 2014	Hanford	Northern	Seniors, Physically Challenged, Limited Income, Limited English, General Public	Meeting/Events	Kings Community Action Organization

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Meter Installation Warehouse	Installation Timeline	Area Represented	Public Affairs Region	Stakeholder / Audience	Communication Channel / Event	Description/ Organization Name (If Applicable)
Visalia	Q2 2014	Hanford	Northern	General Public	Meeting/Events	Kings Community Action Organization
Anaheim	Q2 2014	Santa Ana	Orange County		Meeting/Events	Pacific Islander Health Partner
Anaheim	Q2 2014	Santa Ana	Orange County	Seniors	Meeting/Events	Pacific Islander Health Partner
Visalia	Q2 2014	Tulare	Northern		Communication	Economic Development Corp. of Tulare County
Irwindale	Q2 2014	West Covina	Los Angeles	Seniors, Physically Challenged, Low Income, Limited English, General Public	Communication	East San Gabriel Valley Japanese Serv. Ctr.
Irwindale	Q2 2014	West Covina	Los Angeles	Seniors, Physically Challenged, Low Income, Small Business, Limited English, General Public	Communication	East San Gabriel Valley Japanese Serv. Ctr.
Hemet	Q2 2014	Riverside	South Inland Empire	Seniors, Physically Challenged, Low Income, Small Business, Limited English, Rural, General Public	Communication	Foundation for Economic Stability - Riverside Community Action Partnership
Anaheim	Q2 2014	Garden Grove	Orange County	Seniors, Physically Challenged, Low Income, Limited English	Communication	Community Action Partnership of Orange County
Hemet	Q2 2014	Banning	South Inland Empire	Seniors, Low Income, Small Business, Limited English, General Public	Communication	Boys and Girls Club of San Gorgonio
Anaheim	Q2 2014	Garden Grove	Orange County	Seniors, Physically Challenged, Low Income, Limited English, Rural, General Public	Communication	Community Action Partnership of Orange County
Visalia	Q2 2014	Tulare	Northern	Low Income, Limited English, Rural, General Public	Mail/Call	United Way of Tulare County
Irwindale	Q2 2014	West Covina	Los Angeles	Seniors, Physically Challenged, Low Income, Limited English, Other CBO(s)	Mail/Call	East San Gabriel Valley Japanese Serv. Ctr.

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Irwindale	Q2 2014	West Covina	Los Angeles	Seniors, Physically Challenged, Low Income, General Public, Other CBO(s)	Mail/Call	East San Gabriel Valley Japanese Serv. Ctr.
Visalia	Q2 2014	Hanford	Northern	Low Income, Limited English, Rural, General Public	Mail/Call	Kings Community Action Organization
Hemet	Q2 2014	Riverside	South Inland Empire	Seniors, Physically Challenged, Low Income, Limited English, Rural, General Public	Mail/Call	Foundation for Economic Stability - Riverside Community Action Partnership
Visalia	Q2 2014	Tulare	Northern	Seniors, Physically Challenged, Low Income, Limited English, Rural, General Public	Mail/Call	United Way of Tulare County
Visalia	Q2 2014	Tulare	Northern	Small Business, Other CBO(s)	Mail/Call	United Way of Tulare County
Hemet	Q2 2014	Banning	South Inland Empire	Seniors, Small Business, General Public	Mail/Call	Boys and Girls Club of San Geronio
Visalia	Q2 2014	Tulare	Northern	Small Business, General Public	Mail/Call	United Way of Tulare County
Anaheim	Q2 2014	Garden Grove	Orange County	Seniors, Physically Challenged, Low Income, Limited English	Mail/Call	Community Action Partnership of Orange County
Anaheim	Q2 2014	Garden Grove	Orange County	Seniors, Physically Challenged, Low Income	Mail/Call	Community Action Partnership of Orange County
Anaheim	Q2 2014	La Habra	Orange County	Low Income, Limited English	Mail/Call	Boys & Girls Clubs of La Habra
Los Angeles	Q1 2014	Los Angeles	Los Angeles	Small Business Owner, Other	Chamber	Mujeres Activas en el Comercio Hispano
Irwindale	Q1 2014	Azuza	Los Angeles	Small Business Owner, Business Association Representative, Rural	Chamber	Azuza Chamber of Commerce
Los Angeles	Q1 2014	Los Angeles	Los Angeles	Small Business Owner, Business Association	Chamber	CA Small Business Association

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Meter Installation Warehouse	Installation Timeline	Area Represented	Public Affairs Region	Stakeholder / Audience	Communication Channel / Event	Description/ Organization Name (If Applicable)
				Representative, Rural, Other		
Los Angeles	Q1 2014	Los Angeles	Los Angeles	Small Business Owner, Business Association Representative, Rural	Chamber	CA Small Business Association
Los Angeles	Q1 2014	Los Angeles	Los Angeles	Small Business Owner, Business Association Representative	Chamber	CA Small Business Association
Irwindale	Q1 2014	San Dimas	Los Angeles	Small Business Owner, Business Association Representative, Rural, Other	Chamber	San Dimas Chamber of Commerce
Irwindale	Q1 2014	Duarte	Los Angeles	Other	Chamber	Duarte Chamber
Irwindale	Q1 2014	Duarte	Los Angeles	Small Business Owner	Chamber	Duarte Chamber
Visalia	Q2 2014	Visalia	Northern	Small Business Owner, Business Association Representative	Chamber	Visalia Chamber of Commerce
Visalia	Q2 2014	Visalia	Northern	Small Business Owner, Business Association Representative, Rural	Chamber	Visalia Chamber of Commerce
Los Angeles	Q1 2014	Los Angeles	Los Angeles	Small Business Owner, Business Association Representative, Other	Chamber	Latin Business Association
Los Angeles	Q2 2014	Los Angeles	Los Angeles	Small Business Owner, Business Association Representative, Other	Chamber	Latin Business Association
Los Angeles	Q1 2014	Los Angeles	Los Angeles	Small Business Owner, Business Association Representative, Rural, Other	Chamber	Latin Business Association
Irwindale	Q2 2014	West Covina	Los Angeles	Young Adults	Chamber	City of West Covina -West Covina Business Assn.
Irwindale	Q2 2014	Irwindale	Los Angeles	Small Business Owner, Business Association Representative	Chamber	Irwindale Chamber of Commerce
Hemet	Q2 2014	Hemet	South Inland Empire	Small Business Owner,	Chamber	Hemet/San Jacinto Chamber of Commerce

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Meter Installation Warehouse	Installation Timeline	Area Represented	Public Affairs Region	Stakeholder / Audience	Communication Channel / Event	Description/ Organization Name (If Applicable)
				Business Association Representative, Other		
Hemet	Q1 2014	Hemet	South Inland Empire	Small Business Owner, Business Association Representative, Other	Chamber	Hemet/San Jacinto Chamber of Commerce
Irwindale	Q2 2014	Glendora	Los Angeles	Small Business Owner	Chamber	Glendora Chamber of Commerce
Irwindale	Q2 2014	Glendora	Los Angeles	Small Business Owner, Business Association Representative	Chamber	Glendora Chamber of Commerce
Irwindale	Q2 2014	Glendora	Los Angeles	Small Business Owner, Business Association Representative, Rural	Chamber	Glendora Chamber of Commerce
Irwindale	Q2 2014	Glendora	Los Angeles	Small Business Owner, Business Association Representative, Other	Chamber	Glendora Chamber of Commerce
Irwindale	Q2 2014	Azuza	Los Angeles	Small Business Owner, Business Association Representative, Rural	Chamber	Azuza Chamber of Commerce
Visalia	Q2 2014	Hanford	Northern	Small Business Owner, Business Association Representative, Other	Chamber	Kings County Economic Development Corp.
Visalia	Q2 2014	Hanford	Northern	Small Business Owner, Business Association Representative, Rural, Other	Chamber	Kings County Economic Development Corp.
Visalia	Q1 2014	Hanford	Northern	Small Business Owner, Business Association Representative, Rural, Other	Chamber	Kings County Economic Development Corp.
Irwindale	Q2 2014	San Dimas	Los Angeles	Small Business Owner, Business Association Representative, Rural, Other	Chamber	San Dimas Chamber of Commerce
Irwindale	Q2 2014	San Dimas	Los Angeles	Small Business Owner, Business Association	Chamber	San Dimas Chamber of Commerce

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Meter Installation Warehouse	Installation Timeline	Area Represented	Public Affairs Region	Stakeholder / Audience	Communication Channel / Event	Description/ Organization Name (If Applicable)
				Representative		
Hemet	Q2 2014	Banning	South Inland Empire	Small Business Owner, Business Association Representative, Other	Chamber	Banning Chamber of Commerce
Hemet	Q2 2014	Banning	South Inland Empire	Small Business Owner, Other	Chamber	Banning Chamber of Commerce
Visalia	Q2 2014	Tulare	Northern	Small Business Owner, Business Association Representative, Rural, Other	Chamber	Tulare Chamber of Commerce
Visalia	Q2 2014	Corcran	Northern	Small Business Owner, Rural	Chamber	Corcoran Chamber of Commerce
Visalia	Q2 2014	Corcran	Northern	Small Business Owner, Business Association Representative, Rural	Chamber	Corcoran Chamber of Commerce
Visalia	Q2 2014	Corcran	Northern	Small Business Owner, Business Association Representative	Chamber	Corcoran Chamber of Commerce
Anaheim	Q2 2014	Fullerton	Orange County	Business Association Representative	Chamber	Fullerton Chamber of Commerce
Anaheim	Q2 2014	Fullerton	Orange County	Small Business Owner, Business Association Representative, Other	Chamber	Fullerton Chamber of Commerce
Irwindale	Q2 2014	West Covina	Los Angeles	Residents of Community	Chamber	City of West Covina -West Covina Business Assn.
Los Angeles	Q2 2014	Los Angeles	Los Angeles	Small Business Owner, Business Association Representative, Rural	Chamber	Latin Business Association
Los Angeles	Q2 2014	Los Angeles	Los Angeles	Small Business Owner	Chamber	Latin Business Association
Los Angeles	Q1 2014	Los Angeles	Los Angeles	Small Business Owner	Chamber	Regional Hispanic Chamber of Commerce
Anaheim	Q2 2014	La Habra	Orange County	Small Business Owner, Business Association Representative, Other	Chamber	La Habra Area Chamber of Commerce
Visalia	Q2 2014	Hanford	Northern	Small Business Owner, Other	Chamber	Kings County Economic Development Corp.
Visalia	Q2 2014	Hanford	Northern	Small Business Owner,	Chamber	Kings County Economic Development Corp.

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				Business Association Representative, Rural		
Irwindale	Q2 2014	San Dimas	Los Angeles	Other	Chamber	San Dimas Chamber of Commerce
Perris	Q1 2014	Perris	South Inland Empire	Business Association Representative	Chamber	Moreno Valley Black Chamber of Commerce Community Foundation
Perris	Q1 2014	Perris	South Inland Empire	Small Business Owner	Chamber	Moreno Valley Black Chamber of Commerce Community Foundation
Perris	Q1 2014	Perris	South Inland Empire	Other	Chamber	Moreno Valley Black Chamber of Commerce Community Foundation
Perris	Q1 2014	Perris	South Inland Empire	Small Business Owner, Business Association Representative, Rural	Chamber	Moreno Valley Black Chamber of Commerce Community Foundation
Perris	Q1 2014	Perris	South Inland Empire	Small Business Owner, Business Association Representative	Chamber	Moreno Valley Black Chamber of Commerce Community Foundation
Perris	Q2 2014	Perris	South Inland Empire	Small Business Owner, Business Association Representative, Rural, Other	Chamber	Moreno Valley Black Chamber of Commerce Community Foundation
Perris	Q2 2014	Perris	South Inland Empire	Other	Chamber	Moreno Valley Black Chamber of Commerce Community Foundation
Irwindale	Q2 2014	Temple City	Orange County	Small Business Owner, Business Association Representative, Other	Chamber	Temple City Chamber of Commerce
Irwindale	Q2 2014	Temple City	Orange County	Small Business Owner, Business Association Representative, Rural, Other	Chamber	Temple City Chamber of Commerce
Los Angeles	Q2 2014	Los Angeles	Los Angeles	Small Business Owner, Business Association Representative, Rural, Other	Chamber	Am Ind.Chamber of Commerce
Hemet	Q2 2014	Beaumont	South Inland Empire	Small Business Owner, Business Association Representative, Rural	Chamber	Beaumont Chamber of Commerce

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Anaheim	Q2 2014	Brea	Orange County	Small Business Owner, Business Association Representative	Chamber	Brea Chamber of Commerce
Anaheim	Q2 2014	Fullerton	Orange County	Small Business Owner, Business Association Representative	Chamber	Fullerton Chamber of Commerce
Anaheim	Q1 2014	Corona	South Inland Empire	Small Business Owner, Business Association Representative, Other	Chamber	Greater Corona Chamber of Commerce
Anaheim	Q2 2014	Corona	South Inland Empire	Small Business Owner, Business Association Representative, Other	Chamber	Greater Corona Chamber of Commerce
Anaheim	Q1 2014	Corona	South Inland Empire	Small Business Owner, Business Association Representative	Chamber	Greater Corona Chamber of Commerce
Anaheim	Q2 2014	Corona	South Inland Empire	Small Business Owner, Business Association Representative	Chamber	Greater Corona Chamber of Commerce
Irwindale	Q2 2014	San Dimas	Los Angeles	Small Business Owner, Business Association Representative, Other	Chamber	San Dimas Chamber of Commerce
Perris	Q2 2014	Temecula	South Inland Empire	Small Business Owner	Chamber	Temecula Valley Chamber of Commerce
Perris	Q2 2014	Murrieta	South Inland Empire	Small Business Owner, Other	Chamber	Murrieta Chamber of Commerce
Los Angeles	Q2 2014	Los Angeles	Los Angeles	Small Business Owner	Chamber	Asian Bus. Assn., L.A.
Los Angeles	Q2 2014	Los Angeles	Los Angeles	Small Business Owner, Business Association Representative	Chamber	Asian Bus. Assn., L.A.
Irwindale	Q2 2014	Duarte	Los Angeles	Small Business Owner	Chamber	Duarte Chamber
Irwindale	Q2 2014	Duarte	Los Angeles	Small Business Owner, Other	Chamber	Duarte Chamber
Irwindale	Q2 2014	Duarte	Los Angeles	Other	Chamber	Duarte Chamber
Northridge	Q1 2014	Simi Valley	Northern	Community	Community Meeting / Event	Simi Neighborhood Council, #1 District
Northridge	Q1 2014	Simi Valley	Northern	Community	Community Meeting / Event	Simi Neighborhood Council, #2 District
Northridge	Q1 2014	Simi Valley	Northern	Community	Community Meeting / Event	Simi Neighborhood Council, #4 District

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Irwindale	Q1 2014	Monrovia	Northern	Community	1x1 Briefing	Meeting with resident impacted by DCU She did not like the location of DCU pole. Door knocked and new site across the street was agreed upon. DCU was moved.
Visalia	Q1 2014	Visalia and Tulare Counties	Northern	Community	Other	Met with CSET
Visalia	Q1 2014	Visalia and Tulare Counties	Northern	Community	Other	Met with Foodlink
Visalia	Q1 2014	Visalia and Tulare Counties	Northern	Community	Other	Meet with Economic Development Corp of Tulare County
Visalia	Q1 2014	Visalia and Tulare Counties	Northern	Community	Other	Meet with United Way of Tulare County
Visalia	Q1 2014	Visalia and Tulare Counties	Northern	Community	Media	Met with Visalia Rawhide Minor Baseball League
Visalia	Q1 2014	Visalia and Tulare Counties	Northern	Community	Other	Met with Visalia Emergency Aid Council
Visalia	Q1 2014	Visalia and Tulare Counties	Northern	Community	Other	Met with Tulare Kings Hispanic Chamber of Commerce
Visalia	Q1 2014	Visalia and Tulare Counties	Northern	Community	Other	Attend World Ag Expo Customer Appreciation Dinner in Visalia
Visalia	Q1 2014	Visalia and Tulare Counties	Northern	Community	Other	World Ag Show in Tulare.
Northridge	Q1 2014	Simi Valley	Northern	Community	Community Meeting / Event	Simi Valley Neighborhood Council, District 4
Valencia	Q1 2014	Palmdale	Northern	Other	1x1 Briefing	City of Palmdale
Visalia	Q1 2014	Visalia and Tulare Counties	Northern	Community	Media	Advertised with the Visalia Rawhide Minor Baseball League
Sun Valley	Q1 2014	Burbank	Northern	Other	1x1 Briefing	Met with City Manager
Bakersfield	Q1 2014	County of Santa Barbara	Northern	Elected Official	1x1 Briefing	Met with Santa Barbara County Supervisors and Chief of Staff
Valencia	Q1 2014	Lancaster	Northern	Other	1x1 Briefing	Met with Jason Caudle, Assistant City Manager Robert Neal, Public Works Director Carlyle Workman, Utility Services Manager
Valencia	Q1 2014	California City	Northern	Other	1x1 Briefing	Met with City Manager and Public Works Director
Santa Barbara	Q1 2014	City of Santa Barbara	Northern	Other	Other	Presented DCU sites for approval before the Santa Barbara City architecture Review Board
Nipomo	Q1 2014	Paso Robles	Northern	Elected Official	City Council	DCU attachment agreement on the city council agenda

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Valencia	Q1 2014	Canyon Country	Northern	Community	1x1 Briefing	Met with Crystal Springs HOA members
Visalia	Q1 2014	Hanford	Northern	Community	Community Meeting / Event	Lions Breakfast Club of Hanford
Oxnard	Q1 2014	City of Ojai	Northern	Other	1x1 Briefing	Met with City Manager and Public Works Director
Visalia	Q1 2014	City of Woodlake	Northern	Community	Community Meeting / Event	Woodlake Health Fair
Sun Valley	Q2 2014	Unincorporated Los Angeles County- Kagel Canyon	Los Angeles	Community	1x1 Briefing	Met with Kagel Canyon Association regarding a proposed DCU site in community
Valencia	Q2 2014	Stevenson Ranch	Northern	Community	Community Meeting / Event	Stevenson Ranch HOA
Santa Barbara	Q2 2014	Santa Barbara	Northern	Other	Other	Santa Barbara City Architecture Review Board
Valencia	Q2 2014	Lancaster	Northern	Other	Other	Held a request for proposal meeting with nonprofits/chambers in Lancaster and Palmdale
Valencia	Q2 2014	Valencia	Northern	Other	Other	Held a request for proposal meeting with nonprofits/chambers in Valencia and Santa Clarita
Valencia	Q2 2014	Santa Clarita	Northern	Other	1x1 Briefing	Met with Santa Clarita City Manager
Sun Valley	Q2 2014	Unincorporated Los Angeles County- Kagel Canyon	Los Angeles	Community	Community Meeting / Event	Kagel Canyon Association
Northridge	Q2 2014	Calabasas	Northern	Community	Community Meeting / Event	Calabasas Chamber of Commerce Government Affairs Meeting
Northridge	Q2 2014	Hidden Hills	Northern	Other	1x1 Briefing	Met with Hidden Hills City Manager and Public Works Director
Various	Q1 2014	Territory Wide	Northern	Other	Other	Independent City Association
Los Angeles	Q1 2014	Los Angeles	Los Angeles	Community	Community Meeting / Event	Downtown Los Angeles Neighborhood Council (DLANC) – Public Comments
Los Angeles	Q1 2014	Los Angeles	Los Angeles	Community	Community Meeting / Event	Historic and Cultural Neighborhood Council (HCNC) – Public Comments
Los Angeles	Q1 2014	Los Angeles	Los Angeles	Community	Community Meeting / Event	Atwater Village Neighborhood Council (AVNC) – Public Comments
Los Angeles	Q1 2014	Los Angeles	Los Angeles	Community	Community Meeting / Event	Greater Cypress Park Neighborhood Council (GCPNC) – Public Comments
Los Angeles	Q1 2014	Los Angeles	Los Angeles	Community	Community Meeting / Event	Glassell Park Neighborhood Council (GPNC) - Agenda
Los Angeles	Q1 2014	Los Angeles	Los Angeles	Community	Community Meeting / Event	Elysian Valley Riverside NC (EVRNC) – Public Comments
Los Angeles	Q1 2014	Los Angeles	Los Angeles	Community	Community Meeting / Event	Lincoln Heights Neighborhood Council (LHNC) - Agenda
Los Angeles	Q1 2014	Los Angeles	Los Angeles	Community	Community Meeting / Event	West Lake South Neighborhood Council (WLSNC) – Public Comments
Los Angeles	Q1 2014	Los Angeles	Los Angeles	Community	Community Meeting / Event	Arroyo Seco Neighborhood Council (ASNC) - Agenda
Los Angeles	Q1 2014	Los Angeles	Los Angeles	Community	Community Meeting / Event	Greater Echo Park Elysian Neighborhood Council (GEPENC) - Agenda

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Los Angeles	Q1 2014	Los Angeles	Los Angeles	Community	Community Meeting / Event	Boyle Heights Neighborhood Council (BHNC) – Public Comments
Los Angeles	Q1 2014	Los Angeles	Los Angeles	Community	Community Meeting / Event	Panorama City Neighborhood Council (PCNC) – Public Comments
Los Angeles	Q1 2014	Los Angeles	Los Angeles	Community	Community Meeting / Event	Pico Union Neighborhood Council.
Los Angeles	Q1 2014	Los Angeles	Los Angeles	Community	Community Meeting / Event	Eagle Rock Neighborhood Council
Los Angeles	Q1 2014	Los Angeles	Los Angeles	Community	Community Meeting / Event	Silver Lake Neighborhood Council
Los Angeles	Q1 2014	Los Angeles	Los Angeles	Community	Community Meeting / Event	LA 32 Neighborhood Council
Los Angeles	Q1 2014	Los Angeles	Los Angeles	Community	Community Meeting / Event	Highland Park Neighborhood Council
Los Angeles	Q1 2014	Los Angeles	Los Angeles	Community	Community Meeting / Event	Empowerment Congress North Neighborhood Council
Los Angeles	Q1 2014	Los Angeles	Los Angeles	Community	Community Meeting / Event	Sherman Oaks Neighborhood Council
Los Angeles	Q1 2014	Los Angeles	Los Angeles	Community	Community Meeting / Event	Sun Valley Neighborhood Council
Los Angeles	Q1 2014	Los Angeles	Los Angeles	Community	Community Meeting / Event	Van Nuys Neighborhood Council
Los Angeles	Q1 2014	Los Angeles	Los Angeles	Community	Community Meeting / Event	Westlake North Neighborhood Council
Los Angeles	Q1 2014	Los Angeles	Los Angeles	Community	Community Meeting / Event	Rampart Village Neighborhood Council
Los Angeles	Q1 2014	Los Angeles	Los Angeles	Community	Community Meeting / Event	Los Feliz Neighborhood Council
Los Angeles	Q1 2014	Los Angeles	Los Angeles	Community	Community Meeting / Event	Arleta Neighborhood Council
Los Angeles	Q1 2014	Los Angeles	Los Angeles	Community	Community Meeting / Event	Pacoima Neighborhood Council
Los Angeles	Q1 2014	Los Angeles	Los Angeles	Community	Community Meeting / Event	Foothill Trails Neighborhood Council
Los Angeles	Q2 2014	Los Angeles	Los Angeles	Community	Community Meeting / Event	Wilshire Center Neighborhood Council
Los Angeles	Q2 2014	Los Angeles	Los Angeles	Community	Community Meeting / Event	Central Alameda Neighborhood Council
Los Angeles	Q2 2014	Los Angeles	Los Angeles	Community	Community Meeting / Event	South Central Neighborhood Council
Los Angeles	Q2 2014	Los Angeles	Los Angeles	Community	Community Meeting / Event	West Adams Neighborhood Council
Los Angeles	Q2 2014	Los Angeles	Los Angeles	Community	Community Meeting / Event	Mid City Neighborhood Council
Los Angeles	Q2 2014	Los Angeles	Los Angeles	Community	Community Meeting / Event	Empowerment Congress Northeast Neighborhood Council
Los Angeles	Q2 2014	Los Angeles	Los Angeles	Community	Community Meeting / Event	West Los Angeles Neighborhood Council
Los Angeles	Q2 2014	Los Angeles	Los Angeles	Community	Community Meeting / Event	CANNDU Neighborhood Council
Los Angeles	Q2 2014	Los Angeles	Los Angeles	Community	Community Meeting / Event	Central Hollywood Neighborhood Council
Los Angeles	Q2 2014	Los Angeles	Los Angeles	Community	Community Meeting / Event	Korea Town Neighborhood Council
Los Angeles	Q2 2014	Los Angeles	Los Angeles	Community	Community Meeting / Event	Mid City West Neighborhood Council
Los Angeles	Q2 2014	Los Angeles	Los Angeles	Community	Community Meeting / Event	Westwood Neighborhood Council
Los Angeles	Q2 2014	Los Angeles	Los Angeles	Community	Community Meeting / Event	Empowerment Congress Southwest Neighborhood Council
Los Angeles	Q2 2014	Los Angeles	Los Angeles	Community	Community Meeting / Event	108th Street Homeowners Association (South Central Los Angeles)
Los Angeles	Q2 2014	Los Angeles	Los Angeles	Community	Community Meeting / Event	South Central Clergy Association
Los Angeles	Q2 2014	Los Angeles	Los Angeles	Community	Community Meeting / Event	Sylmar Neighborhood Council
Los Angeles	Q2 2014	Los Angeles	Los Angeles	Community	Community Meeting / Event	Olympic Park Neighborhood Council

Exhibit D
List of Community Events and Briefings

Meter Installation Warehouse	Installation Timeline	Area Represented	Public Affairs Region	Stakeholder / Audience	Communication Channel / Event	Description/ Organization Name (If Applicable)
Los Angeles	Q2 2014	Los Angeles	Los Angeles	Community	Community Meeting / Event	NANDC Neighborhood Council
Los Angeles	Q2 2014	Los Angeles	Los Angeles	Community	Community Meeting / Event	South Central Community Police Advisory Board
Los Angeles	Q2 2014	Los Angeles	Los Angeles	Community	Community Meeting / Event	98th Street Block & Friends Club
Los Angeles	Q1 2014	Los Angeles	Los Angeles	Community	Community Meeting / Event	Neighbors United, Faircrest Heights
Northridge	Q1 2014	Northridge	Los Angeles	Community	Community Meeting / Event	The Valley of the Stars: Reaching new heights Commemorating the 20th Anniversary of the Northridge Quake
Los Angeles	Q1 2014	Inglewood	Los Angeles	Community	Community Meeting / Event	Inglewood MLK Day Event
Los Angeles	Q1 2014	Hollywood	Los Angeles	Community	Chamber	State of the City of Hollywood
Los Angeles	Q1 2014	Inglewood	Los Angeles	Community	Community Meeting / Event	Inglewood Mayor's Town Hall
Santa Monica	Q1 2014	Los Angeles	Los Angeles	Community	Community Meeting / Event	Marquez Knolls Home Owner's Association
Los Angeles	Q1 2014	Los Angeles	Los Angeles	Community	Community Meeting / Event	Senior Center Director's Knowledge Fair
Los Angeles	Q1 2014	Carson	Los Angeles	Community	Chamber	Carson Chamber of Commerce Business Expo
Los Angeles	Q1 2014	West Hollywood	Los Angeles	Community	Chamber	Annual Members Meeting & Board Installation and Update of Area
Northridge	Q1 2014	Los Angeles	Los Angeles	Community	Community Meeting / Event	6th Annual Valley Business Mixer
Los Angeles	Q1 2014	Los Angeles	Los Angeles	Elected Official	Briefing and Tower	LAPD and Council Member Chief of Staff to tour LA Warehouse
Los Angeles	Q1 2014	Hollywood	Los Angeles	Community	Community Meeting / Event	2014 Annual Hollywood Expo
Los Angeles	Q2 2014	Hollywood	Los Angeles	Community	Community Meeting / Event	Thai New Year Event
Los Angeles	Q2 2014	Inglewood	Los Angeles	Elected Official	Community Meeting / Event	Inglewood State of the City
Santa Monica	Q2 2014	Malibu	Los Angeles	Community	PSAs	Keep it Clean Malibu Sponsorship of Public Service Announcement Videos
Los Angeles	Q2 2014	Hollywood	Los Angeles	Community	Chamber	Heroes of Hollywood Chamber Event and Recognition
Northridge	Q2 2014	Chatsworth	Los Angeles	Community	Community Meeting / Event	Chatsworth Neighborhood Council Bike the City Event
Los Angeles	Q2 2014	Hollywood	Los Angeles	Community	Chamber	Hollywood Economic Summit
Los Angeles	Q2 2014	Los Angeles	Los Angeles	Community	Community Meeting / Event	Council Member Krekorian and Nazarian Senior Event
Los Angeles	Q2 2014	Los Angeles	Los Angeles	Utility Partners	Orientation	LADWP Grantee Check in Orientation
Anaheim	Q1 2014	Anaheim	Orange County	Community	Community Meeting / Event	Anaheim State of the City
Anaheim	Q1 2014	Buena Park	Orange County	Elected Official	Community Meeting / Event	Buena Park State of the City
Anaheim	Q1 2014	Irvine	Orange County	Elected Official	Community Meeting / Event	Best and Braves OC Fire Authority
Anaheim	Q1 2014	Garden Grove	Orange County	Community	Community Meeting / Event	Tet Festival
Anaheim	Q1 2014	Newport Beach	Orange County	Elected Official	Community Meeting / Event	State of the County//Shawn Nelson
Anaheim	Q1 2014	Orange	Orange County	Elected Official	Community Meeting / Event	Orange State of the City
Mission Viejo	Q2 2014	San Clemente	Orange County	Elected Official	Community Meeting / Event	San Clemente State of the City
Mission Viejo	Q2 2014	Dana Point	Orange County	Elected Official	Community Meeting / Event	Dana Point State of the City
Anaheim	Q2 2014	Rossmoor	Orange County	Community	Community Meeting / Event	Rossmoor Community Festival

Exhibit D
List of Community Events and Briefings

Meter Installation Warehouse	Installation Timeline	Area Represented	Public Affairs Region	Stakeholder / Audience	Communication Channel / Event	Description/ Organization Name (if Applicable)
Mission Viejo	Q2 2014	Laguna Niguel	Orange County	Elected Official	Community Meeting / Event	Laguna Niguel State of the City
Anaheim	Q2 2014	Brea	Orange County	Community	Chamber	Taste of Brea
Anaheim	Q2 2014	Anaheim	Orange County	Community	Community Meeting / Event	ICAN Luncheon
Anaheim	Q2 2014	Costa Mesa	Orange County	Community	Community Meeting / Event	ACCOC 5th Annual Summit
Mission Viejo	Q2 2014	Ladera Ranch	Orange County	Elected Official	Community Meeting / Event	Ladera Ranch State of the City
Irwindale	Q2 2014	Arcadia	Orange County	Community	Community Meeting / Event	Arcadia Community Coordinating Council
Anaheim	Q2 2014	Brea	Orange County	Community	Community Meeting / Event	Senator Bob Huff Breakfast Club
Anaheim	Q2 2014	Irvine	Orange County	Elected Official	Community Meeting / Event	Irvine State of City
Anaheim	Q2 2014	Brea	Orange County	Community	Chamber	Good Morning Brea

Exhibit E

Evaluation of Southern California Gas Company's 2013-2014 Conservation Campaign

Submitted by Nexant

July 2014



Evaluation of Southern California Gas Company's 2013-2014 Conservation Campaign
Submitted to Southern California Gas Company
Submitted By Nexant
August 29, 2014

Prepared by:

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1 Executive Summary

Southern California Gas Company (SoCalGas) began deploying advanced meters (AM) in its service territory in late 2012, pursuant to California Public Utilities Commission (CPUC) Decision (D.)10-04-027. These meters are capable of providing enhanced information services that can help consumers better manage and control their energy costs. By rigorously evaluating these types of information services, SoCalGas can demonstrate how to meet its 1% energy savings goal that is associated with its AM rollout.¹ Each year of the AM rollout, SoCalGas will conduct a Conservation Campaign that is designed to test various enhanced information programs. This document is the evaluation of the first Conservation Campaign, which lasted from October 2013 through March 2014.

This report addresses the following primary objectives:

- Meet the requirements of D.10-04-027 to track and attribute the conservation impacts of the AM rollout and to report measured savings every six months; and
- Help demonstrate how SoCalGas can achieve its 1% energy savings goal in a cost-effective manner.

The 2013-2014 Conservation Campaign (Campaign) tested two information feedback options – bill alerts and home energy reports (HERs). These two information feedback options were chosen because they have the potential to reach large numbers of consumers and demonstrate how to meet the 1% energy savings goal in a cost-effective manner. SoCalGas developed a bill alert service that provides weekly information through email and/or text message to customers concerning the amount of gas they have used (and the associated cost) since they received their last bill. The service is called Bill Tracker Alert (BTA), which was tested on an opt-in and default basis for residential and small/medium business (SMB) customers during the 2013-2014 Conservation Campaign. In addition to bill alerts, the 2013-2014 Conservation Campaign featured Opower HERs to a test group of 50,000 customers.

1.1 Customer Acceptance

Customer acceptance of the treatments is indicated by the enrollment rate for opt-in BTA (i.e., the percentage of customers that enroll out of the total solicited) and the retention rate for default treatments (i.e., the percentage of customers that remain on the treatment out of the total defaulted). The HER treatments had a high retention rate (99.6%). Retention rates were also quite high for default BTA. At the end of the Campaign, 99% of residential default BTA customers and 96% of SMB default BTA customers were still enrolled in the treatment. For opt-in BTA, the enrollment rate was lowest among SMB customers, which reached a 3.9% enrollment rate at the end of the March 2014. With 17.2% of customers enrolling by the end of the Campaign, the highest opt-in rate was among one of the test cells that included over 40,000 residential My Account customers. All of the opt-in rates increased substantially (more than doubled in most cases) in January as a result of the \$10 Amazon gift card that was offered in January and February.

¹ This energy savings goal specifically refers to 1% of total *residential* gas usage.

1.2 Energy Conservation Estimates

Three different default treatments were offered to residential My Account customers – email HERs, an email/paper HER combination and BTAs. A fourth default treatment cell delivered paper-only HERs to residential non-My Account customers. All four of these residential default treatments produced percent reductions in gas usage that were highly statistically significant. Among the three default treatments offered to My Account customers, the two HER treatments produced gas savings of roughly 1.5% and the BTA treatment produced gas savings of roughly 0.7%. The default HER treatment for non-My Account customers produced similar usage changes, 1.6%, as did a similar treatment for My Account customers. For SMB customers, BTA was tested on a default basis, but the results were not statistically significant. BTA was offered on an opt-in basis to four different residential segments and one SMB segment, but none of those tests showed a statistically significant reduction in gas usage.

Table 1-1 summarizes the total estimated gas savings for the 2013-2014 SoCalGas Conservation Campaign. Gas savings are only calculated for the treatments that produced statistically significant usage reductions, which includes the four default treatments for residential customers. In total, nearly 200,000 therms were conserved as a result of the 2013-2014 Conservation Campaign. Roughly 43% of these savings came from treatment group T-1 (paper-only HER for non-My Account customers), which had the highest percent reduction and the largest number of participants among the four default treatments for residential customers. Nearly 19% of the total energy savings were produced by the default BTA treatment (T-4). The remaining 38% of gas savings were split roughly evenly between the two HER treatments for My Account customers (T-2 and T-3). Overall, these four default treatments produced gas savings of 1.3%, which shows progress toward the 1% savings goal that SoCalGas would like to achieve.

Table 1-1: Estimated Gas Savings for the 2013-2014 SoCalGas Conservation Campaign

Treatment	Group	Number of Active Customers per Month	Aggregate Usage for November through March		
			Reference Therms	Observed Therms	Therms Saved
Email HER	T-3	11,387	2,480,648	2,443,937	36,711
Paper & Email HER	T-2	11,374	2,481,568	2,442,628	38,940
Default BTA	T-4	22,841	4,975,764	4,939,173	36,591
Paper-only HER	T-1	23,552	5,172,610	5,088,553	84,057
Overall		69,154	15,110,589	14,914,290	196,299

1.3 Proposed 2014-2015 Conservation “Test & Learn” Plan

A fundamental tenant of the “test and learn” process is to continuously improve toward more cost-effective solutions. While the 2013-2014 results for the residential default treatments are encouraging, it may be possible to produce comparable (or higher) energy savings at a lower cost. Therefore, to test ways of improving cost-effectiveness, the 2014-2015 Conservation Campaign will adjust the program offerings as follows:

- Continue and expand Opower HER treatments, including some refinements and testing of a year-round option (the default BTA and Aclara HERs described below will also be tested on a year-round basis);
- Include a test of Aclara HERs, which differ from the prior HERs offered by Opower in that they include different conservation messages, have more AM-specific content and an emphasis on driving customers to the SoCalGas.com, My Account-based *Ways to Save* online tools and other conservation/energy efficiency programs as appropriate;
- Continue and expand default BTA, but with fewer direct mail communications, which are relatively costly (if comparable energy savings can be achieved without those costly communications, then cost-effectiveness will improve);
- No longer offer BTA on the opt-in basis, due to the high acquisition cost and relatively low enrollment rates;
- For the 2013-2014 HER treatments, continue to track and measure energy savings in order to determine whether savings persist even if SoCalGas no longer sends HERs to those customers; and
- For the 2013-2014 BTA treatments, continue to track and measure energy savings in order to determine whether savings persist, even if SoCalGas no longer sends accompanying email and direct mail communications.

In addition, the 2014-2015 Conservation Campaign will be able to take advantage of an expanded AM footprint, which as of June 30, 2014 includes nearly 2 million residential customers. Therefore, SoCalGas will have sufficient numbers of customers to improve its targeting strategy as follows:

- Focus on the top two usage quartiles; and
- Only include customers who have pretreatment data from October 2013 through March 2014.

Finally, SoCalGas will exclude SMB customers from upcoming Conservation Campaigns until there are sufficient numbers of customers to conduct a valid RCT of default treatments.

2 Introduction

Southern California Gas Company (SoCalGas) began deploying advanced meters (AM) in its service territory in late 2012. According to its meter deployment plan, AM meters will be fully deployed to the Company's approximately 6 million customers by the end of 2017. These meters are capable of providing enhanced information services that can help consumers better manage and control their energy costs. By rigorously evaluating these types of information services, SoCalGas can demonstrate how to meet its 1% energy savings goal that is associated with its AM rollout.² Each year of the AM rollout, SoCalGas will conduct a Conservation Campaign that is designed to test various enhanced information programs, primarily during the heating season from October through March.³ In approving SoCalGas' AM application in D.10-04-027, the CPUC directed SoCalGas "to establish a system to track and attribute the conservation impacts of its AM rollout" and to report the measured savings every six months. This document is the first of the biannual reports to include impact results of the Conservation Campaign, which was implemented as outlined in prior biannual reports.

2.1 Research Objectives and Design

This report addresses the following primary objectives:

- Meet the requirements of D.10-04-027 to track and attribute the conservation impacts of the AM rollout and to report measured savings every six months; and
- Help demonstrate how SoCalGas can achieve its 1% energy savings goal in a cost-effective manner.

Meeting the first objective requires a rigorous research strategy that conclusively determines whether or not information feedback provided by SoCalGas through various programs caused changes in gas usage. Usage varies significantly across months, seasons and years. As a result, comparing usage before and after customers receive information treatments is not a suitable approach to estimating conservation effects. Instead, impacts must be estimated by comparing usage for two groups of customers that are identical except for the fact that one group receives information feedback (the treatment group) and the other does not (the control group).

Meeting the second objective requires adherence to a "test and learn" strategy that quickly identifies the marketing strategies and service options that are most cost-effective for achieving energy savings through information services. This strategy was envisioned by D.10-04-027, which stated, "we expect that customer outreach, education and communications will continue to evolve and improve as SoCalGas conducts customer research, monitors customer reaction to new AM technology and various customer usage presentation tools, and incorporates feedback from these activities into its AM outreach and education activities."

² This energy savings goal specifically refers to 1% of total *residential* gas usage.

³ For some treatments, information feedback will be provided on a year-round basis. Considering that the Conservation Campaign started in October 2013, this report only includes results for the heating season. Given that some treatments will be provided on a year-round basis, results for future years of the Conservation Campaign will include summer months. For example, next year's results for the 2014-2015 Conservation Campaign will measure a full year of conservation from April 2014 through March 2015.

2.2 Overview of Information Services Tested

The 2013-2014 SoCalGas Conservation Campaign tested two information feedback options – bill alerts and home energy reports (HERs). These two information feedback options were chosen because they have the potential to reach large numbers of consumers and demonstrate how to meet the 1% energy savings goal in a cost-effective manner. SoCalGas developed a bill alert service that provides weekly information through email and/or text message to customers concerning the amount of gas they have used (and the associated cost) since they received their last bill. The service is called Bill Tracker Alert (BTA), which was tested on an opt-in and default basis for residential and small/medium business (SMB) customers during the 2013-2014 Conservation Campaign. In addition to bill alerts, the 2013-2014 Conservation Campaign featured Opower HERs to a test group of 50,000 customers. All customers receiving HERs were defaulted onto the service and received HERs either through direct mail or through a combination of direct mail and email. In addition to displaying comparisons of households' gas consumption with that of neighbors, the HERs provided tips on how to reduce gas consumption.

2.2.1 Home Energy Reports

Figure 2-1 summarizes the features and timeline of the residential HER treatments that were implemented by Opower from October 2013 through March 2014. In total, 50,000 customers were sampled for the HER treatments, split evenly between non-My Account and My Account customers. The 25,000 non-My Account customers received the paper-only HER treatment, which included four paper HERs between October 2013 and February 2014, a welcome insert along with the first HER and a door hanger in November/December. The 25,000 My Account customers were split evenly between those who received the paper & email HER treatment and those who received the email HER treatment. The paper & email HER treatment for My Account customers was the same as the paper-only treatment, except the paper & email treatment included four emails between January and March. Email HER customers were also exposed to this schedule of emails, in addition to a single paper HER in October and a door hanger in October/November. For My Account customers, the email HERs were originally scheduled to start in December, but due to technical issues, the first email HER was delivered in January, resulting in a “doubling up” of email HERs in that month. Therefore, any energy savings for email HER customers in October through December are attributable to the initial paper HER and door hanger, not the email HERs.

Figure 2-1: Features and Timeline of Residential HER Treatments (October 2013 through March 2014)

	Non-My Account Customers Paper-only HER 25,000 customers						My Account Customers Paper & Email HER 12,500 customers						My Account Customers Email HER 12,500 customers					
	Oct	Nov	Dec	Jan	Feb	Mar	Oct	Nov	Dec	Jan	Feb	Mar	Oct	Nov	Dec	Jan	Feb	Mar
Paper HER																		
Welcome Insert													★					
Door Hanger																		
Email HER																		

★ Welcome message for Group 3 was included in module on Home Energy Report

Figures 2-2 and 2-3 provide examples of the front and back sides of the paper HER. The paper HERs featured the following four sections:

- Previous month's gas usage compared with usage by similar neighbors;
- Last 12 months' gas usage compared with usage by similar neighbors;
- Comparison of this year's gas usage to previous year's usage; and
- Personalized tips.

Figure 2-2: Paper HER Example (Front)

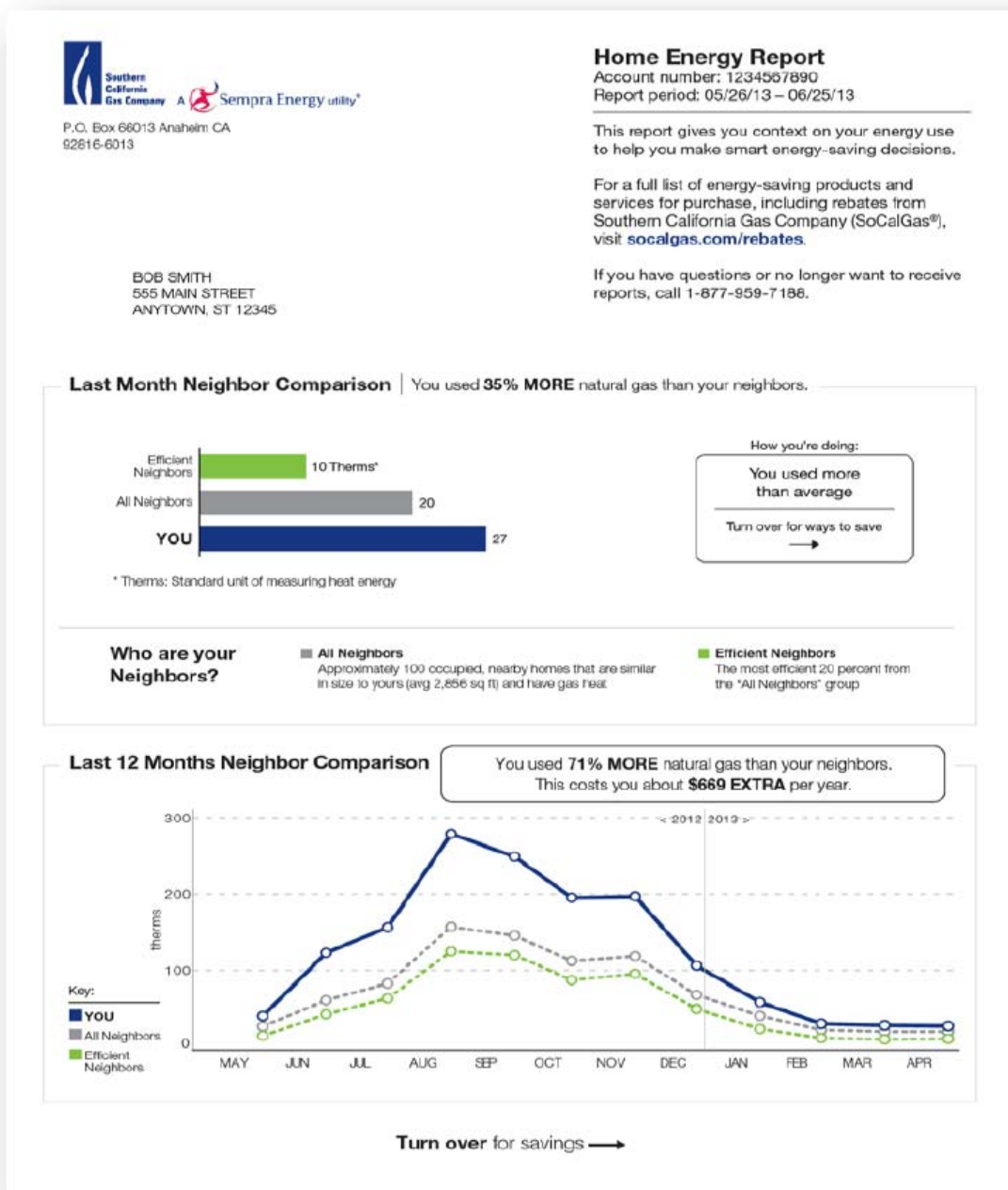


Figure 2-3: Paper HER Example (Back)

Personal Comparison

How you're doing compared to last year:

Year	Usage (therms)
YOU JAN - MAR 2012	962
YOU JAN - MAR 2013	890

So far this year, you used **8% less** natural gas than last year.

★ You're on pace to use less in 2013

* Therms: Standard unit of measuring heat energy

Looking for ways to save even more? Visit socialgas.com/rebates

Personalized Tips | For a complete list of energy saving investments and smart purchases, visit socialgas.com/rebates.

Quick Fixes

Things you can do right now

Be smart about clothes washing

Water heating accounts for about 90% of the energy used for washing clothes.

Unless your clothes have oily stains, washing with cold or warm water is effective. Some detergents are made specially for cold water, though most detergents will work.

For more savings, run only full loads and don't use the "sanitary" or "allergy-free" cycles, which use extremely hot water and increase energy use significantly.

SAVE UP TO
\$25 PER YEAR

Smart Purchases

Save a lot by spending a little

Remember to check filters monthly

By checking your filters monthly, you can improve the energy efficiency of your heating and cooling system, save money and improve your indoor air quality.

First, remove the filter—it usually slides right out. Next, hold the filter up to a light to see if it is clogged.

You can find a new filter at your local hardware store for about \$2. Check your manual for cleaning instructions if you have a permanent filter.

SAVE UP TO
\$50 PER YEAR

Great Investments

Big ideas for big savings

Choose a more efficient water heater

If you are in the market to replace your water heater, consider the energy efficiency of the system. The higher the energy factor (EF) of the system, the more efficient it is.

An efficient water heating system can significantly reduce your monthly water heating costs. Solar water heaters are efficient but not appropriate for all households, so you may also want to consider a heat pump water heater or a gas demand (tankless) water heater as efficient alternatives.

SAVE UP TO
\$140 PER YEAR

runs on **OP@WER**®

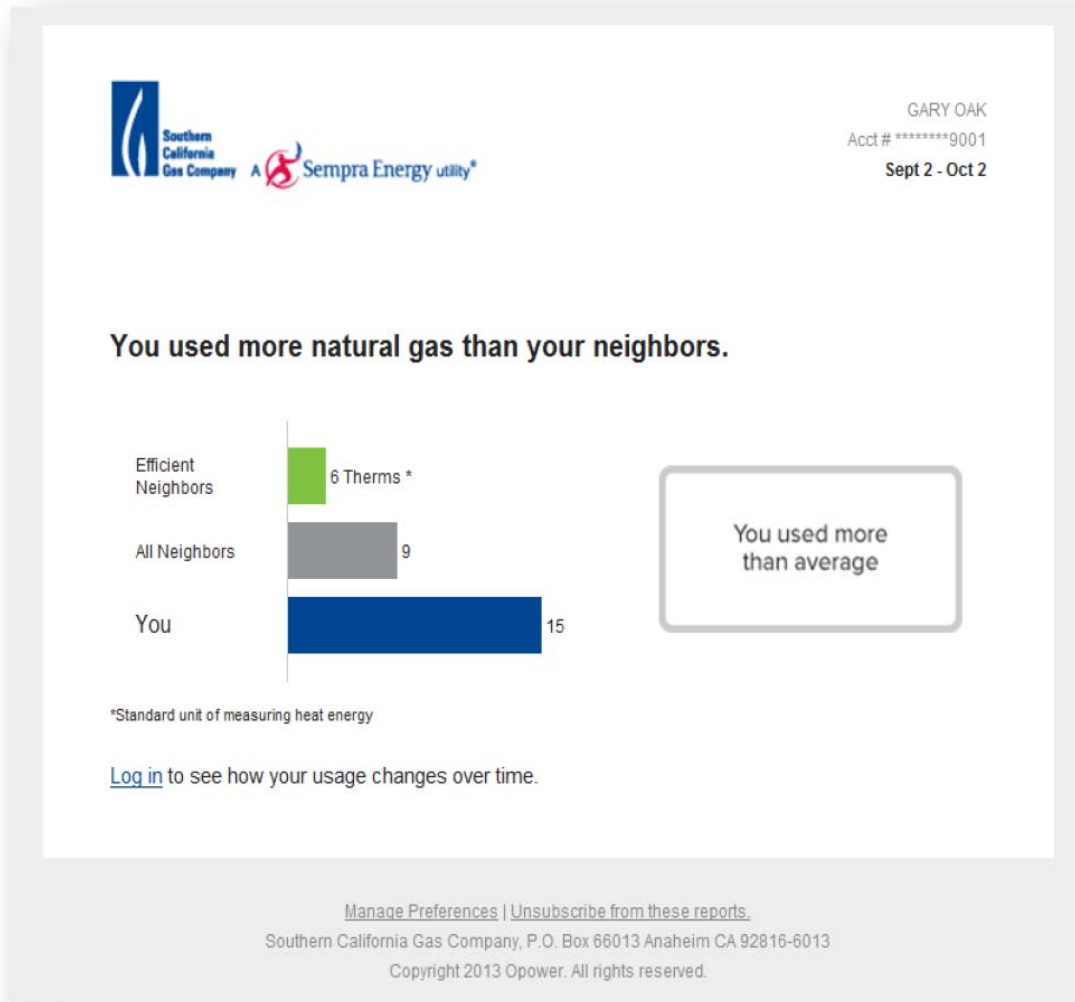
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Figure 2-4 provides an example of the email HER, which was simpler than the paper HER. The email HER included one section – previous month’s gas usage compared with similar neighbors, which is similar to the first section of the paper HER. Examples of the remaining materials that Opower sent – the welcome insert and the door hanger – are provided in Appendix A.

Figure 2-4: Email HER Example



2.2.1 Bill Tracker Alerts

BTAs are weekly reports provided to customers by email and/or text message that describe the cost of gas that they have consumed since receiving their last bill. BTAs also provided a forecast of what a customer’s gas bill would be at the end of the billing period if they continued to consume gas at the same rate. Customers were not able to set specific goals for daily or weekly gas consumption. BTAs are designed to raise customers’ awareness of the amount of gas they are using and its impact on their bill.


When opt-in BTA customers enrolled in BTA, they could choose to receive alerts via email, text message or both. Default BTA customers received notifications through email. Throughout the 2013-2014

Conservation Campaign, opt-in and default BTA customers also received informational letters and emails that provided cost savings tips and promoted the *Ways to Save* online tools through My Account. The specific communications that were sent to default and opt-in BTA customers are summarized at the end of this section.

Figure 2-5 shows the template for the SoCalGas BTA notification through email. The email BTAs featured the following information:

- Bill amount (\$) to date;
- Projected amount (\$) for next bill;
- Days remaining and days elapsed in the current bill cycle;
- Last month's bill amount (\$);
- Bill amount (\$) for same month in the prior year; and
- Links to the SoCalGas *Ways to Save* tool and rebate programs.

Figure 2-5: Template for SoCalGas Email BTA Notification



A Semptra Energy company

SoCalGas® Bill Tracker Notification



Your Bill Tracker Update

Use this weekly update to help manage your monthly natural gas bill.

Account Number:	<last 5 digits *****67890>
Bill to Date:	amount in \$\$ (up to \$99,999)
Projected Next Bill:	in \$\$ (up to \$99,999)
Days remaining in the current billing cycle:	(e.g., 23)
Days elapsed in the current billing cycle:	(e.g., 5) [Email alerts only]
Last Month's Bill:	in \$\$ (up to \$99,999) [SCG CIS Data]
Last Year, Same Month's Bill:	(current bill cycle month) in \$\$ (up to \$9,999)

Log in to My Account to set up a savings goal by visiting "[Ways to Save](#)" – our personalized interactive tool.

[Log In »](#)

Connect with us:  

[socialgas.com](#) | [Bill Assistance](#) | [Rebate Programs](#)

To ensure continued receipt of e-mail messages from SoCalGas, please add customerservice@socialgas.com to your address book. Please do not reply to this email. Mail sent to this address cannot be answered.

If you wish to cancel this Alert email, you can do so by logging into your My Account at <https://myaccount.socialgas.com> and unsubscribing in your "Manage Alerts" preference center inside the Manage My Account tab.

Southern California Gas Company values your privacy. For more information, view our [Privacy Policy](#) and [Privacy Notice](#).

Email notification code: <AM100>

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Figure 2-6 provides an example of a text message BTA notification, which is similar to the email BTA notification. However, due to limits on the number of characters that can be included in a single text message, links to the *Ways to Save* tool and rebate programs were not provided in the text message BTAs.

Figure 2-6: Example SoCalGas Text Message BTA Notification



Communications Sent to Default BTA Customers

In mid-October 2013, nearly 25,000 residential customers and over 4,000 SMB customers were defaulted onto BTA and started automatically receiving BTAs through their primary My Account email address (non-My Account customers could not be defaulted onto BTA because SoCalGas does not have their email address). The default customers could also log into My Account and change their notification preferences to receive BTAs through text message as well, but the vast majority stayed with the BTAs through email alone. In addition to the 15 or more BTAs that these customers received throughout the 2013-2014 Conservation Campaign, SoCalGas sent multiple emails and letters, as summarized in Table 2-1. These communications included a welcome email and letter in October upon auto-enrollment, four emails and one letter with links to the My Account *Ways to Save* tools, a letter at the end of November with an insert describing “3 Easy Ways to Save” and a letter in mid-January with a “Winter Savings Checklist”. All of these materials are provided in Appendix B.

Table 2-1: Email and Direct Mail Communications Sent to Default BTA Customers Throughout the 2013-2014 SoCalGas Conservation Campaign

Date Sent	Communication Sent
10/9	BTA Welcome Email ⁴
10/14	BTA Welcome Letter
11/21	Email with Links to My Account <i>Ways to Save</i>
11/22-11/27	Letter with "3 Easy Ways to Save" Insert
1/16	Letter with "Winter Savings Checklist"
1/22	Email with Links to My Account <i>Ways to Save</i>
2/12	Email with Links to My Account <i>Ways to Save</i>
2/12	Letter with Links to My Account <i>Ways to Save</i>
3/12	Email with Links to My Account <i>Ways to Save</i>

Communications Sent to Opt-in BTA Customers

In the second week of October 2013, around 240,000 residential customers and nearly 15,000 SMB customers began receiving solicitations to enroll in BTA on an opt-in basis. Table 2-2 summarizes the numerous emails and letters that SoCalGas sent to opt-in BTA customers throughout the 2013-2014 Conservation Campaign. These communications included four letter solicitations to all customers and six additional email solicitations to My Account customers (non-My Account customers could not receive email solicitations because SoCalGas does not have their email address). The letter at the end of November included an insert describing “3 Easy Ways to Save” and the letter in mid-December included a “Winter Savings Checklist”. The solicitations in January and February included a \$10 Amazon gift card incentive for enrolling in BTAs through email and/or text message. All of the promotional materials for opt-in BTA are provided in Appendix C. In addition, Appendix D provides screenshots of the enrollment microsite (billtracker.socalgas.com), which customers used to enroll online. If customers signed up for BTA, SoCalGas would no longer send them any solicitation materials. Instead, SoCalGas would start sending the same communications that default customers received, as summarized in Table 2-1. Therefore, depending on when customers signed up, they received various combinations of the opt-in BTA promotional materials in Table 2-2 and the communications for BTA subscribers in Table 2-1.

⁴ The welcome email was erroneously sent to each customer’s secondary email address, which was different from the one to which BTAs were sent. The remaining email communications were sent to the primary My Account email address.

Table 2-2: Email and Direct Mail Communications Sent to Opt-in BTA Customers Throughout the 2013-2014 SoCalGas Conservation Campaign

Date Sent	Communication Sent
10/9	Email Solicitation ⁵
10/11-10/14	Letter Solicitation
11/21	Email Solicitation
11/22-11/27	Letter Solicitation with "3 Easy Ways to Save" Insert ⁶
12/18-12/20	Letter Solicitation with "Winter Savings Checklist"
12/19	Email Solicitation
1/16	Letter Solicitation with \$10 Amazon Gift Card Offer
1/22	Email Solicitation with \$10 Amazon Gift Card Offer
2/12	Email Solicitation with \$10 Amazon Gift Card Offer
3/12	Email Solicitation

2.3 2013-2014 Winter Weather Conditions

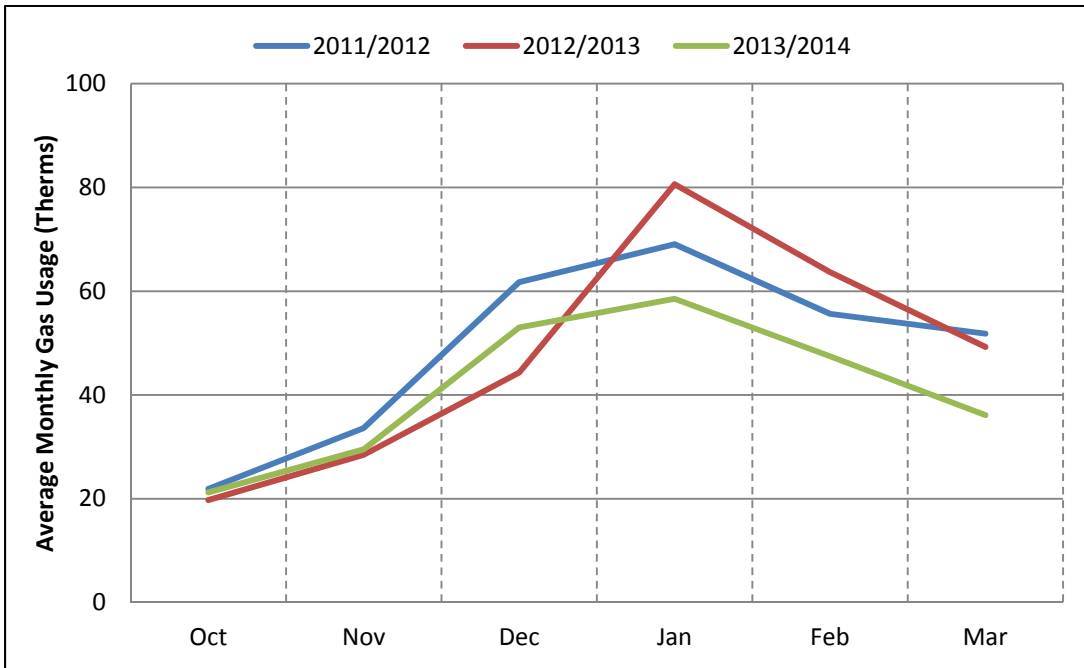
To fully interpret the energy savings that resulted from the 2013-2014 Conservation Campaign, it is important to consider the winter weather conditions. This consideration is especially relevant for the 2013-2014 winter because it was the warmest on record in California.⁷ This unseasonably warm weather was reflected in the overall gas usage for residential SoCalGas customers, as shown in Figure 2-7, which provides a comparison of residential gas usage over the past three winters. From October through December, residential gas usage in the 2013 heating season was similar to gas usage in the prior two years. However, in January through March, residential gas usage was substantially lower in 2014 than it was in the prior two years. Overall, 2014 residential gas usage from January through March was around 23% lower than the prior year’s usage. Nonetheless, it is unclear what effect (if any) this unseasonably warm weather had on the energy savings that resulted from the information feedback treatments, considering that similar treatments were not available in prior years. Assuming that next year’s weather is closer to the norm for winter in Southern California, the 2014-2015 Conservation Campaign will provide an opportunity to assess how the absolute and percent energy savings vary under different weather conditions.

⁵ The first email solicitation was erroneously sent to each customer’s secondary email address. The remaining email communications were sent to the primary My Account email address.

⁶ The November letter solicitation included a correction notice regarding a malfunction with the enrollment website that resulted in some customers not being able to successfully enroll in October.

⁷ Reuters. “Warmest winter on record worsens California drought.” March 18, 2014.

Figure 2-7: Comparison of SoCalGas Residential Gas Usage Over the Past Three Winters



2.4 Report Organization

The remainder of this report proceeds as follows:

- Section 3 describes the research design, including the treatment and control group assignments for residential and SMB customers;
- Section 4 summarizes customer acceptance of the opt-in and default treatments;
- Section 5 outlines the various gas savings impact estimation options and explains why Nexant chose the modeling approach that is used to estimate gas savings;
- Section 6 summarizes the energy conservation estimates for all of the treatments;
- Section 7 provides recommendations for the 2014-2015 SoCalGas Conservation Campaign; and
- The appendices include example communications and promotional materials for all of the treatments and a description of the sample size determination.

3 Research Design

In order to determine if the new information services made available by SoCalGas change energy use for consumers who have access to them, it is necessary to estimate what energy use would have been for those customers if they had not had access to the information. Conceptually, this can be accomplished by comparing usage before and after a group of customers receives the information, but other factors such as differences in weather or economic conditions can make such comparisons highly inaccurate, especially given that the 2013-2014 winter was the warmest on record in California, as discussed in Section 2.3. Side-by-side comparisons of customers that do (the treatment group) and don't (the control group) have access to the service of interest is the best approach, but only if the two groups of customers are identical except for the fact that one gets the information service and the other doesn't. Obtaining well matched treatment and control groups is the fundamental challenge to getting accurate impact estimates.

In the evaluation plan⁸ for its 2013-2014 Conservation Campaign, SoCalGas considered the full spectrum of options before determining that a randomized encouragement design (RED) was the preferred option for the opt-in BTA treatment and a randomized control trial (RCT) design was the preferred option for the default programs. The evaluation plan provides a summary of the reasons why other options were rejected. Those reasons are not revisited here.

SoCalGas decided to focus the impact measurement on information treatments and market segments that have the greatest potential to meet the 1% savings goal, while limiting impact measurement of the online *Ways to Save* tools that can be accessed through the Company's My Account website. These tools include online presentation of daily and hourly gas usage and costs, which is made available to all My Account users with an AM. Consequently, they meet the CPUC requirement to provide access to new information upon installation of an AM. However, because they will be available to everyone, it is not possible to accurately measure their impact by establishing a large control group to be used for measurement purposes. On the other hand, SoCalGas has more control over who receives offers for BTAs and HERs. As such, these information treatments allow for implementation of the rigorous experimental research designs that will produce highly accurate impact estimates even when impacts are expected to be small on average.

Nonetheless, as discussed in Section 2.2, the BTA treatments also included various email and direct mail communications that were designed to encourage customers to visit the online *Ways to Save* tools. Therefore, while SoCalGas has not measured the impact of the availability of these web presentation tools for the AM footprint as a whole, the BTA energy savings estimates may be partially attributable to these email and direct mail communications as well as any conservation that may have resulted from incremental engagement with the *Ways to Save* online tool. Nonetheless, SoCalGas believes that BTAs and HERs have greater potential to produce measureable usage reductions because they are "pushed" to customers without them having to be proactive in accessing the information. The *Ways to Save* tools require customers to take the proactive step of logging in to access the information, which studies have

⁸ Southern California Gas Company's Evaluation Plan for Estimating Conservation Effects from Information Feedback Services. August 9, 2013. (Included as Appendix O in the "Southern California Gas Company Advanced Meter Semi-Annual Report" filed with the CPUC on August 30, 2013)

shown most customers do not do on a regular basis. In fact, throughout the 2013-2014 Conservation Campaign, the impact of the numerous email and direct mail communications on *Ways to Save* uptake was negligible.

Finally, an important input into development of the evaluation plan was the size of the participant population and control groups required to estimate behavioral effects. A summary of the sample size determination is provided in Appendix E.

3.1 Residential Treatment and Control Group Assignments

Several factors were taken into consideration when determining which customers should be targeted for the initial test cells in the 2013-2014 Conservation Campaign and how the target market should be segmented.

The first important consideration is usage. Customers with low annual usage may not be interested in or respond to information feedback since their bills are so low that even significant percent changes in energy use would produce only very small economic benefit in the form of bill savings. Even if these customers produced above average savings relative to other customers (which, for reasons just mentioned, may be unlikely), their contribution to the target of 1% savings in aggregate for the overall population would be small and the marketing and implementation costs for these customers per therm conserved would be very high. In short, it is highly unlikely that low usage customers are cost-effective and almost certain that they would be less cost-effective than customers with larger usage. Given this, the target population for the initial test cells was separated between low usage customers (bottom quartile) and medium/high usage customers (top three quartiles). In addition, the low usage segment was only offered the opt-in BTA treatment.

Another important segmentation factor is whether customers are My Account users. My Account customers register with SoCalGas to receive a variety of online services, including receiving, viewing and paying their bills, accessing current and historical usage data, making payment arrangements and scheduling changes in service such as starting or stopping service. As of September 2013, about 41% of residential customers with an AM were registered My Account users. In the general population, about one-third of residential customers are active My Account users and this proportion is growing, with about 15,000 net new customers enrolled each month. Given their demonstrated interest in online transactions, My Account customers may be more likely than non-My Account customers to take advantage of the new information available through BTAs or HERs. They also are a population for whom SoCalGas has email addresses and, thus, can receive email solicitations and information feedback through that inexpensive channel. For all of these reasons, the population of customers targeted for both BTAs and HERs was segmented into My Account and non-My Account customers.

The final segmentations of the residential AM-enabled customer base were between those that did and did not go through the eligibility screen for HERs, and among customers that went through the eligibility screen, those that did and did not pass the screen. At the end of July 2013, SoCalGas delivered to Opower a file that included all customers that were scheduled to receive an AM before the Conservation Campaign began in October. Opower required this file before the Campaign began in order to have time to conduct its eligibility screens and process the historical customer usage data that would be used for

generating neighborhood comparisons in the HERs. Between the end of July and the beginning of October, SoCalGas changed its AM rollout schedule, which produced roughly 35,000 medium/high usage customers that had an AM, but were not eligible for HERs because Opower did not previously receive historical usage data for these customers. Among the customers for which Opower received historical usage data, only 4% of medium/high usage customers did not pass the eligibility screen for HERs. However, an additional 8.4% of medium/high usage customers with an AM were not eligible for HERs because they did not go through the Opower screen at all, due to changes in the AM rollout schedule. Considering that this evaluation compares HER impacts with default BTA impacts and opt-in BTA impacts, the segmentation must allow for an estimation of default BTA impacts and opt-in BTA impacts specifically for customers that went through and passed the Opower eligibility screen. This test cell design ensures that the comparison of impacts only measures the difference between the type of information feedback delivered, and not a difference in the underlying customer mix.

Figure 3-1 provides a summary of the population segmentation and treatment and control group assignments for residential customers in the 2013-2014 Conservation Campaign. As of September 2013, nearly 560,000 residential customers were AM-enabled. As discussed above, this initial study population was divided into usage quartiles, with low usage customers comprising the first usage quartile and medium/high usage customers comprising the top three usage quartiles. The roughly 139,000 low usage customers were randomly divided evenly into a control group and a treatment group that received the opt-in BTA treatment. No other treatments were provided to low usage customers in the Conservation Campaign's first year. Among the nearly 420,000 medium/high usage customers, 35,194 customers (8.4%) did not go through the Opower screen and 15,431 customers (3.7%) went through the Opower screen, but did not pass. In the initial evaluation plan, these groups were combined into one group that was randomly divided evenly into a control group and a treatment group that received the opt-in BTA treatment. However, Nexant separated these two groups in this analysis because the two groups represent distinct segments of the population.⁹

Among the nearly 370,000 customers that went through and passed the Opower screen, 41% were My Account customers and, therefore, SoCalGas had email addresses for these customers. These roughly 150,000 medium/high usage, My Account customers that passed the Opower eligibility screen provided the opportunity to test the largest variety of treatments on the same population of customers. Considering that SoCalGas had email addresses for all of these customers, the impact of email HERs relative to paper & email HERs was tested. As such, 12,500 customers were randomly allocated to each of these HER treatments. In addition, SoCalGas was able to use the email address for My Account customers to test default BTA, which was randomly assigned to 25,000 customers. The remaining 100,479 medium/high usage, My Account customers that passed the Opower eligibility screen were randomly divided evenly between the opt-in BTA treatment and a control group. This control group was used to estimate impacts for all treatments within the segment.

Further comparisons of HERs and opt-in BTA were made among medium/high usage, non-My Account customers that passed the Opower eligibility screen. Around 25,000 of these customers were randomly

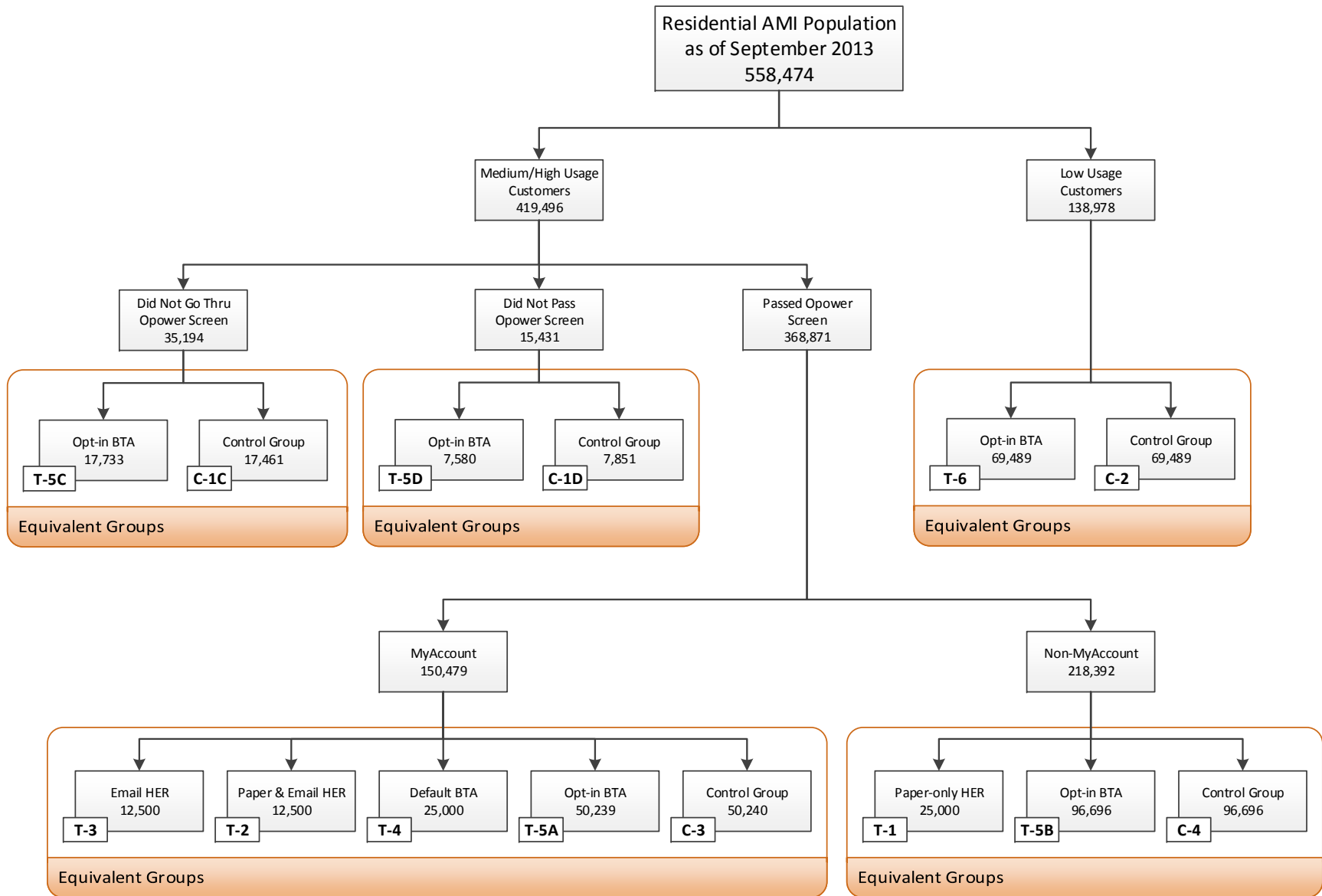
⁹ Customers who did not go through the Opower screen are located in specific geographical areas that were affected by batch changes to the AM rollout schedule, whereas customers who did not pass the Opower screen are distributed throughout the AM footprint.

assigned to the paper-only HER treatment and the remaining were randomly divided evenly between the opt-in BTA treatment and a control group (96,696 each). This control group was used to estimate impacts for both treatments within the segment. Considering that SoCalGas does not have email addresses for these customers, default BTA and email HERs were not an option in the non-My Account segment.

In summary, the 558,474 residential customers in the initial AM population (as of September 2013) were allocated as follows:

1. **Opt-in BTA:** 241,737 customers (number of solicitations, not enrollees);
2. **Default BTA:** 25,000 customers;
3. **HERs:** 50,000 customers (25% email, 25% paper & email, 50% paper-only); and
4. **Control Group:** 241,737 customers.

Figure 3-1: Residential Treatment and Control Group Assignments for the 2013-2014 Conservation Campaign

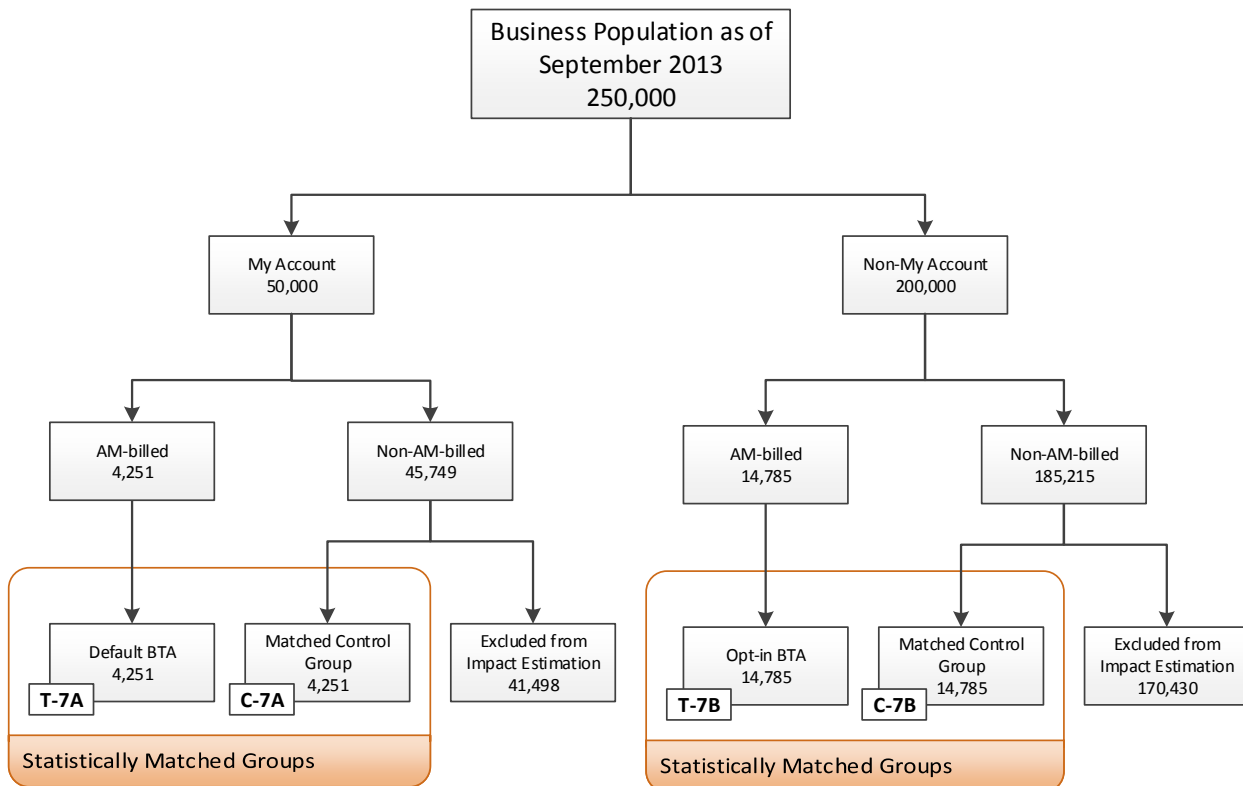


3.2 SMB Treatment and Control Group Assignments

As of September 2013, around 19,000 of approximately 250,000 SoCalGas SMB customers had an AM. This number of AM-enabled customers is insufficient to conduct rigorous impact analyses with an RED or RCT design. Nonetheless, SoCalGas tested customer acceptance of two programs among the AM-enabled business customers – default BTA and opt-in BTA. Nexant conducted impact analyses for these two programs using a statistically matched control group of SMB customers that were not AM-enabled. Although this impact estimation method is not as precise as an RED or RCT, it is still worthwhile to conduct the matched control group analysis. If default BTA or opt-in BTA have a relatively large percentage impact on usage, this method will be able to detect the effect.

Figure 3-2 summarizes the population segmentation and treatment and control group assignments for SMB customers. As of September 2013, the SoCalGas business population had roughly 250,000 customers, of which roughly 20% had My Account. The 50,000 My Account customers were split into 4,251 AM-billed customers and 45,749 non-AM billed customers. The AM-billed, My Account customers were all defaulted onto BTA, and to estimate the impacts, Nexant used a matched control group of 4,251 customers from the pool of non-AM-billed customers. As for non-My Account customers, these roughly 200,000 customers were split into 14,785 AM-billed customers and 185,215 non-AM-billed customers. The AM-billed, non-My Account customers were offered BTA on an opt-in basis, and to estimate the impacts, Nexant used a matched control group of 14,785 customers from the pool of non-AM-billed customers. The remaining non-AM-billed customers were excluded from the impact estimation.

Figure 3-2: SMB Treatment and Control Group Assignments for the 2013-2014 Conservation Campaign



3.3 Residential Data Sources

Nexant received daily gas usage data in therms for the residential AM-enabled customer base for the post-treatment period from October 1, 2013 through March 31, 2014. Since the equivalent pretreatment period spanned from October 1, 2012 through March 31, 2013 (before most of these customers had an AM), monthly billing data was the only pretreatment usage data available for most customers. These two data sources were combined to yield 12 months of gas usage data for the study period of interest for the majority of customers in the study sample, spanning from October 1, 2012 through March 31, 2014, with the non-heating months (April through September 2013) omitted. For estimation purposes, October was dropped from the pre- and post-treatment period both because usage is quite low in that month relative to the other “winter” months, and also because the vast majority of customers had not yet experienced the treatment until at least partially into the month. Thus, the impact estimates discussed in Section 6 span the period from November 1, 2013 through March 31, 2014.

In an RED/RCT design that uses difference-in-differences to estimate the energy savings, customers must have a full panel of pre- and post-treatment usage data in order to be included in the analysis. Basically, customers that were not active SoCalGas accounts from October 1, 2012 through March 31, 2014 were excluded from the analysis. As long as the percentage of customers dropped is consistent between each treatment group and associated control group, this exclusion of customers from the analysis does not produce bias in the conservation estimates. To verify that the percentage of customers dropped is consistent within each segment, Table 3-1 shows the number of customers that were included in the analysis by treatment/control group, compared to the original number of customers that was sampled. Among medium/high usage customers that went through the Opower screen, all treatment and control groups retained at least 87% of the customers that were originally sampled. The medium/high usage customers that did not go through the Opower screen experienced a relatively high drop off rate of just over 27%, which suggests that this segment of the population was not representative of the greater AM footprint. Among low usage customers, roughly 65% were retained. Most importantly, the percentage of customers retained is highly consistent within each statistically equivalent group, which ensures that the integrity of the original sample design is held intact even though some customers had to be dropped from the analysis.¹⁰

¹⁰ For the purposes of estimating whether the treatments produced a statistically significant reduction in overall gas usage throughout the 2013-2014 Conservation Campaign, these customers were dropped. However, once Nexant identifies a statistically significant usage reduction within a given test cell, the analysis can be done at the monthly level, which allows for the re-inclusion of some customers that may not have had usage data for every month, but do have data for some pre- and post-treatment months. Basically, when the analysis is conducted at the monthly level, as long as a customer has data for an individual pre- and post-treatment month, that customer can be included in the analysis for that month.

**Table 3-1: Residential Customers Included in Analysis by Treatment/Control Group
(Sets of Equivalent Groups from Figure 3-1 are Grouped Together)**

Group	Number of Customers in Original Sample	Number of Customers in Analysis	% of Original Sample in Analysis
T-5C	17,733	12,893	72.7%
C-1C	17,461	12,640	72.4%
T-5D	7,580	6,688	88.2%
C-1D	7,851	6,844	87.2%
T-6	69,489	45,474	65.4%
C-2	69,489	45,792	65.9%
T-3	12,500	10,942	87.5%
T-2	12,500	10,890	87.1%
T-4	25,000	21,909	87.6%
T-5A	50,239	43,964	87.5%
C-3	50,240	43,805	87.2%
T-1	25,000	23,018	92.1%
T-5B	96,696	88,803	91.8%
C-4	96,696	88,852	91.9%
Total	558,474	462,514	82.8%

3.4 SMB Data Sources

For SMB customers, Nexant received monthly billing data for the whole study period, which was the same as that of the residential population (October 1, 2012 through March 31, 2014). Considering that all AM-enabled customers were assigned to a BTA treatment, a matched control group was drawn from the non-AM-enabled SMB population. Drawing treatment group usage data from one source and control group usage data from another might have introduced bias into the reported results, hence monthly billing data was used for all SMB customers in the analysis. Table 3-2 shows the number of customers that were included in the analysis for each treatment group, compared to the original number of customers that were sampled. The table also shows the number of customers that were included in the pool of potential matched control group customers, compared to the original number of customers for which monthly billing data was received. As in the residential analysis, SMB customers that were not active SoCalGas accounts from October 1, 2012 through March 31, 2014 were excluded from the analysis. In addition, customers in the analysis were restricted to climate zone 1 to ensure that customers were matched to others within the same climate zone. Only one treatment customer was in a climate zone other than zone 1, and that customer was dropped along with the 8.6% of control pool customers that were located in other climate zones.

Table 3-2: SMB Customers Included in Analysis by Treatment/Control Group

Group	Number of Customer in Original Sample	Number of Customers in Analysis	% of Original Sample In Analysis
T-7A	4,251	3,714	87.4%
T-7B	14,785	12,121	82.0%
Control Pool	241,057	171,535	71.2%
Total	260,093	187,370	72.0%

3.5 SMB Control Group Selection

Propensity score matching was used to select the control group for each SMB test cell. This method is a standard approach for identifying statistical look-alikes from a pool of control group candidates. A probit model was used to estimate a propensity score for each customer based on pretreatment billing data. A probit model is a regression model designed to estimate probabilities – in this case, the probability that a customer was AM-enabled and therefore in the treatment population. Pretreatment usage data was used as it is unperturbed by any treatment effect that may have occurred. Each customer in the treatment population was matched to a customer in the non-AM-billed population with the closest propensity score (excluding climate zone 1).

Table 3-3 shows results from t-tests for the difference between average daily usage of each test cell and its associated control group in pretreatment months. In this case, the desired result is to have few statistically significant differences in order to have confidence that the treatment group and matched control group are similar during the pretreatment period. As shown in the table, control and treatment customer usage are similar during the pretreatment period – any observed differences are negligible and only one of the tests is statistically significant, which is about the number one would expect by chance alone.

Table 3-3: Comparison of Pretreatment Average Daily Usage (Therms) by Month for SMB Treatment and Matched Control Group Customers

Month	Group T-7A				Group T-7B			
	Treatment Usage	Control Usage	T-statistic	P-value	Treatment Usage	Control Usage	T-statistic	P-value
Oct '12	3.93	4.16	-0.49	0.62	2.64	2.62	0.23	0.82
Nov '12	5.74	5.89	-0.25	0.80	3.96	3.73	2.11	0.04
Dec '12	7.53	8.47	-0.86	0.39	5.37	5.16	1.66	0.10
Jan '13	8.20	7.11	0.88	0.38	6.00	5.90	0.73	0.47
Feb '13	7.77	8.10	-0.87	0.39	5.67	5.70	-0.18	0.86
Mar '13	5.63	5.81	-0.51	0.61	3.86	3.80	0.56	0.58

4 Customer Acceptance

Customer acceptance of the treatments is indicated by the enrollment rate for opt-in BTA (i.e., the percentage of customers that enroll out of the total solicited) and the retention rate for default treatments (i.e., the percentage of customers that remain on the treatment out of the total defaulted). The HER treatments had a high retention rate (99.6%). The remainder of this section focuses on customer acceptance of opt-in and default BTA.

Table 4-1 summarizes the BTA enrollment rates throughout the 2013-2014 Conservation Campaign, among customers that were included in the analysis. In general, retention rates were quite high for default BTA. At the end of the Campaign, 99% of residential default BTA customers (T-4) and 96% of SMB default BTA customers (T-7A) were still enrolled in the treatment. Considering that all of the customers included in the analysis were active accounts throughout the pre- and post-treatment periods, these retention rates exclude accounts that closed. For opt-in BTA, the enrollment rate was lowest among SMB customers, which reached a 3.9% enrollment rate at the end of the March 2014. With 17.2% of customers enrolling by the end of the Campaign, the highest opt-in rate was among residential, medium/high usage, My Account customers that passed the Opower screen (T-5A). All of the opt-in rates increased substantially (more than doubled in most cases) in January as a result of the \$10 Amazon gift card that was offered in January and February. This presents issues for the analysis because gas savings are calculated for November through March, but if most of the opt-in BTA enrollees were not receiving alerts for three of five months during the conservation campaign, the impact of the treatment will be muted and less likely to be detected with a statistically significant result.

Table 4-1: Bill Tracker Alert Enrollment Rates Throughout the 2013-2014 Conservation Campaign (Among Customers that Were Included in the Analysis)

Group	Treatment	Number of Customers in Analysis	Percent Enrolled by the Beginning of...					
			Nov-13	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14
T-5C	Res. Opt-in BTA	12,893	0.9%	2.8%	4.0%	8.1%	11.1%	11.4%
T-5D	Res. Opt-in BTA	6,688	0.9%	2.4%	3.5%	6.9%	9.3%	9.6%
T-6	Res. Opt-in BTA	45,474	0.6%	2.2%	3.1%	7.0%	10.2%	10.6%
T-4	Res. Default BTA	21,909	99.5%	99.3%	99.2%	99.1%	99.1%	99.0%
T-5A	Res. Opt-in BTA	43,964	1.6%	3.8%	5.4%	12.2%	16.7%	17.2%
T-5B	Res. Opt-in BTA	88,803	0.4%	2.0%	2.9%	5.0%	7.1%	7.3%
T-7A	SMB Default BTA	3,714	98.8%	97.5%	97.4%	97.2%	96.9%	96.4%
T-7B	SMB Opt-in BTA	12,121	0.2%	0.8%	1.2%	2.7%	3.9%	3.9%

Nexant also ran a choice analysis for residential opt-in BTA customers in order to determine the drivers of customer enrollment. This analysis was conducted for the over 240,000 residential customers who were solicited for opt-in BTA. Table 4-2 provides the choice modeling results, which show the marginal percent increase in enrollment likelihood that is associated with variables of interest. The marginal effects were estimated using a logit model. The most important driver of BTA enrollment was My

Account. My Account customers were 8.9% more likely to enroll in BTA than non-My Account customers. This result is consistent with Table 4-1, which shows the highest opt-in rate for the group that only includes My Account customers (group T-5A).

Table 4-2: Choice Modeling Results for Opt-in BTA

Variable	Marginal Effect	Interpretation
Enrollment in Level Payment Plan	0.034**	Customers who are enrolled in a level payment plan are 3.4% more likely to enroll in BTA than customers who are not
CARE Status	0.03**	Customers on CARE rates are 3% more likely to enroll in BTA than non-CARE customers
Single-family Household	0.01**	Single-family households are 1% more likely to enroll in BTA than multi-family households
Enrollment in My Account	0.089**	Customers who are enrolled in My Account are 8.9% more likely to enroll in BTA than customers who are not on My Account
Direct Debit Payment	0.053**	Customers who use direct debit payment are 5.3% more likely to enroll in BTA than customers who do not use direct debit payment
Paperless Billing	0.038**	Customers enrolled in paperless billing are 3.8% more likely to enroll in BTA than paper billing customers
1st (lowest) Quartile of Usage	0.001	Being in the lowest quartile of gas usage has no significant impact on BTA enrollment, as compared to customers who are in the highest quartile of usage
2nd Quartile of Usage	0.009**	Customers in the 2nd quartile of gas usage are 0.9% more likely to enroll in BTA than customers in the highest quartile of gas usage
3rd Quartile of Usage	0.003	Being in the second highest quartile of gas usage has no significant impact on the likelihood of enrolling in BTA, as compared to the highest quartile of gas usage
4th (highest) Quartile of Usage	-	The highest quartile of gas usage was the group used as the baseline for relative comparison to other usage quartiles
Did Not Go Through Opower Screen	0.005*	Customers who did not go through the Opower screen were slightly more likely to enroll in BTA, though the relationship was weak
Did Not Pass Opower Screen	-0.014**	Customers who did not pass the Opower screen were 1.4% less likely to enroll in BTA than customers who did pass the Opower screen
**p<0.01; *p<0.05; +p<0.1		

5 Gas Savings Impact Estimation Methodology

Nexant estimated models using panel data to determine energy savings. Panel data is a data structure where multiple observations over time are present for multiple individuals. Nexant took the opportunity to test three different model specifications for using the panel data to estimate energy savings – a fixed-effects (FE) model, a random-effects (RE) model and a lagged dependent variable (LDV) model. All models featured time-effect variables as well as error estimates clustered at the customer level. Each of these model specifications has merit under the appropriate circumstances, but they are fundamentally different approaches to estimating treatment effects. Testing several of these approaches allows us to verify the robustness of findings using alternative identification assumptions. Each approach and the associated identification assumptions are outlined below, followed by a discussion of model specifications in the context of estimating gas savings.

5.1 Estimation Using Fixed Effects

Consider a simple panel regression model, shown in Equation 1:

$$y_{it} = \alpha + \beta T_{it} + \delta z_{it} + \varepsilon_{it} \quad (1)$$

where the i subscripts denote individuals and the t subscripts denote time periods. In the context of the Conservation Campaign, the outcome variable is energy consumption (y_{it}) and the parameter of interest is the coefficient on the treatment variable, β , which represents the impact of the treatment. The term z_{it} represents any control variables that may (or may not) be included and the ε_{it} is an idiosyncratic, white noise error term. In this framework, both pretreatment and post-treatment time periods are included in the dataset that is analyzed.

The key assumption in the fixed-effects model is that there are time-invariant variables for each customer omitted from Equation 1 that are relevant in explaining energy consumption and are also potentially correlated with the treatment variable (T_{it}). If these fixed-effects are present and indeed correlated with the treatment, then estimating the model using the standard ordinary least squares (OLS) estimator will produce inconsistent estimates of the treatment effect.¹¹

To obtain a consistent estimate of β , the FE model modifies Equation 1 so that the intercept (α) becomes unique for each customer:

$$y_{it} = \alpha_i + \beta T_{it} + \delta z_{it} + \varepsilon_{it} \quad (2)$$

The term α_i is called a fixed effect and captures all characteristics for each individual customer related to their energy consumption that do not change over time and are not captured by the z variables that are included in the model. In order to get a consistent estimate of the treatment effect, the fixed effects must first be eliminated. The most common way to eliminate the fixed effects is by mean-differencing

¹¹ A consistent estimator has the property that, as the sample size increases, the estimate converges to the true value that we seek an estimate for (i.e., that the estimator converges to a single value and the bias of the estimator converges to zero).

the data for each individual,¹² which is the approach we employ. Once this is accomplished, the resulting transformed equation can be estimated by OLS to provide a consistent estimate of the treatment effect.

The FE model has its disadvantages as well. While controlling for the time-invariant characteristics can be useful, it also means that impacts of any such characteristics cannot be estimated because they are being eliminated from the regression equation during estimation. The exact nature of the unobserved variables is also typically somewhat mysterious. This shortcoming does not pertain to the validity of the estimated effect, rather, it reflects the fact that while the effect of the treatment on the outcome variable becomes known, the identity and specific effects of the unobserved variables on the outcome variable are never brought to light. Another disadvantage of the FE model is that it will not control for any omitted variables that change over time.

Finally, because estimating the FE model requires mean-differencing the data, the only variation used to estimate the treatment effect is variation in variables over time within particular individuals. Because mean-differencing does not make use of any cross-sectional (also called “between”) variation, the estimates from FE will be less precise than other estimators.

5.2 Estimation Using Random Effects

The RE model is a special case of the FE model. Rather than allow for arbitrary correlation between the α_i term in Equation 2 and any explanatory variables, we assume α_i is uncorrelated with the independent variables. In the context of this pilot, this is equivalent to assuming that any individual heterogeneity that influences energy consumption is independent of explanatory variables included in the model, in this case the treatment-time interaction. Certainly in the case of residential customers in the 2013-2014 Conservation Campaign, since treatment was randomly assigned, we would expect this identification assumption to hold, and the RE estimate of the treatment effect to be close to the FE estimate.

The stricter assumption on α_i in the RE model makes it less robust than the FE model. That said, the RE model offers advantages that justify its use over the FE model should the above assumption be satisfied. First, the RE model can include predictors that do not vary over time, and so their relationship with the outcome of interest can be estimated. This isn’t possible in the FE framework since mean-differencing eliminates any time-invariant effect. More importantly for this analysis, because the RE model does not require mean-differencing of the data, variation in variables between individuals can be used to estimate the treatment effect, as well as variation in variables over time within individuals. The estimates from RE will tend to be more precise than the FE estimator because of the use of cross-sectional variation as well as time-series variation.

¹² To mean-difference the data, the average values for each variable in the equation are calculated for an individual and these averages are then subtracted from all of the observations for that individual. Since the fixed effects do not change over time, the average value of α_i is equal to each individual α_i and so the difference is equal to zero and the fixed effects disappear. The transformed version of the model can be written as $\tilde{y}_{it} = \beta\tilde{T}_{it} + \delta\tilde{z}_{it} + \varepsilon_{it}$ where $\tilde{y}_{it} = y_{it} - \bar{y}_i$, $\tilde{T}_{it} = T_{it} - \bar{T}_i$ and $\tilde{z}_{it} = z_{it} - \bar{z}_i$.

5.3 Estimation Using Lagged Dependent Variables

An alternative to the FE model is to incorporate individual heterogeneity by explicitly including past values of an individual's energy consumption as control variables on the right-hand side of the regression equation. Such a model specification is called a lagged dependent variable (LDV) model. In this case, we would modify Equation 2 as follows:

$$y_{it} = \alpha + \beta T_{it} + \delta z_{it} + \theta y_{i,t-1} + \varepsilon_{it} \quad (3)$$

In this specification, the intercept remains the same for everyone (no i subscript on the α) and there is an additional term $y_{i,t-1}$ that represents the energy consumption for individual i in a previous period (in this case, the same month from the prior year). This is akin to saying that what makes consumers unique is captured entirely by their past levels of consumption. Equation 3 can be estimated by pooled OLS, provided that there is no serial correlation in the error term and that there are no omitted variables that are correlated with the treatment. The underlying identification assumption is that average consumption without the treatment would be the same for both treatment and control customers.

Unlike the FE model, a LDV model can explicitly control for any measurable customer characteristics that vary over time. Another advantage is that pooled OLS uses both variation over time within customers and variation between customers so that the resulting estimates of the treatment effect will be relatively more precise than the FE estimate.

The main downside to the LDV model is that if fixed effects do indeed exist and are correlated with the treatment variable, then the LDV estimate of the treatment effect will be inconsistent. Additionally, the LDV model relies on being able to measure the relevant time-varying variables and cannot control for unobserved variables like the FE model can.

5.4 Which is the Appropriate Model?

In considering which model would be most appropriate for this evaluation, the key question is what would happen if the wrong model was used to estimate the treatment effect, i.e., what happens if we use an LDV model when fixed effects are present (or vice versa)? Fortunately, there is a useful discussion of this matter in Angrist and Pischke's "Mostly Harmless Econometrics."¹³ While the RE model is not included in this discussion, this can be thought of as a special case of the FE model that we can estimate if need be. To summarize, although the FE and LDV models are not nested, they do have a useful bracketing property in that the estimates obtained from each model will bound the true treatment effect. Which bound is given by which model depends on the sign of the treatment effect and whether the fixed effects cause the control group pretreatment consumption to be higher or lower than that of the treatment group.

Fortunately, due to the strength of the research design, Nexant does not expect large differences in estimates given by the models outlined above. Any large discrepancies might suggest that the

¹³ Angrist, Joshua D., and Jörn-Steffen Pischke. Mostly harmless econometrics: An empiricist's companion. Princeton university press, 2008. The relevant sections are 5.3-"Fixed Effects versus Lagged Dependent Variables" and 5.4-Appendix: More on fixed effects and lagged dependent variables"

randomization had been compromised in some way for the residential customers, or that business customers had a poor match with their control counterparts. To understand this, consider that for misspecification to be a problem, the omitted variables (whether fixed effects or lagged dependent variables) must be correlated with the treatment. If there is no correlation between the omitted variables and the treatment, then the error term will remain uncorrelated with the explanatory variables and all the models will give consistent estimates of the treatment effect. In theory, this is what one would expect to see in an RCT because randomly assigning the treatment should cause it to be uncorrelated with any other variables that are related to energy consumption. This is why randomization is so useful – it removes the need for complex econometrics by eliminating confounding factors. If the randomization was implemented correctly, one would expect to obtain consistent estimates from all the models, but more precise estimates from the RE model and the LDV model.

Because the information treatments were administered to very large groups of consumers who were randomly assigned to treatment and control groups (i.e., RCT or RED experimental designs), Nexant believes that there is very little risk that there are fixed effects in the experiments that should be controlled using a FE model; and that the most appropriate model for estimating the impacts of the treatments on energy consumption is the LDV model. The impacts reported for the various treatments were obtained from that model. However, since one cannot know with certainty whether the randomizations failed for some unknown reason, impacts were estimated using all three models. Nonetheless, the results for each model were fairly similar within each treatment.

5.5 Estimating Gas Savings

The FE panel regression model is specified below as Equation 4, where t indexes months October 2012 through March 2013 and October 2013 through March 2014 and i indexes individuals. The RE specification is identical. Both are specified with time-effect variables and with error estimates clustered at the customer level. The model variables are defined in Table 5-1.

$$therms_{i,t} = b \cdot (T_i \cdot TreatmentPeriod_t) + c \cdot u_t + v_i + \varepsilon_{it} \quad (4)$$

Table 5-1: Definition of Fixed Effects Model Variables

Variable	Definition
$therms_{i,t}$	average daily gas consumption of participant i during month t
b	estimated treatment effect
c	estimated monthly time effect on treatment and control group
T_i	indicator of whether or not the participant is assigned to the treatment condition
$TreatmentPeriod_t$	indicator of whether or not the treatment was in effect during month t
u_t	Time effects for each month that control for unobserved factors that are common to all treatment and control customers but unique to month t
v_i	participants' fixed effects that control for unobserved factors that are time-invariant and unique to each customer. Fixed effects do not control for fixed characteristics that interact with time-varying factors such as weather.
$\varepsilon_{i,t}$	error for each participant and month

The LDV regression model is specified below as Equation 5, where t indexes months October 2013 through March 2014 and i indexes individuals. The model variables are defined in Table 5-2.

$$therms_{i,t} = a + b \cdot T_i + c \cdot u_t + d \cdot therms_{i,t-12} + \varepsilon_{it} \quad (5)$$

Table 5-2: Definition of Lagged Dependent Variable Model Variables

Variable	Definition
$therms_{i,t}$	average daily gas consumption of participant i during month t
a	estimated intercept
b	estimated treatment effect
c	estimated monthly time effect on treatment and control group
d	estimated effect of an individual's consumption in month $t - 12$
T_i	indicator of whether or not the participant is assigned to the treatment condition
$therms_{i,t-12}$	average daily gas consumption of participant i during month $t - 12$
u_t	Time effects for each month that control for unobserved factors that are common to all treatment and control customers but unique to month t
$\varepsilon_{i,t}$	error for each participant and month

Nexant also estimated energy savings for customers that received BTAs on an opt-in basis. In this case, the treatment effect is scaled up by the proportion of individuals who received the offer on an opt-in

basis and agreed to enroll or that did not opt out of receiving default BTAs, depending on the test cell in question. This estimate is referred to as the local average treatment effect (LATE) and represents the average treatment effect of BTAs on monthly usage for those who enrolled (in the case of opt-in BTA). The LATE estimate is unbiased if the treatment satisfied an exclusion restriction, an additional assumption that requires that customers in the treatment group who did not enroll in BTA were otherwise unaffected by the treatment. Correct standard errors are produced for the LATE estimates by scaling up the standard errors of the LATE estimates by the same factor used to scale the estimates – the proportion of treatment customers that were enrolled to receive BTAs. This scaling of the standard error means that an estimate of the treatment that is not statistically significant will remain not statistically significant for the corresponding LATE. As such, LATE estimates are only reported for statistically significant treatment effects for opt-in BTA customers.

6 Energy Conservation Estimates

This section begins with a summary of the results and conclusions for residential customers, followed by a similar discussion for the two SMB treatments. At the end of the section, an estimate of the total gas savings for the 2013-2014 SoCalGas conservation campaign is provided along with a detailed assessment of how gas savings vary by month and customer segment.

6.1 Results for Residential Customers

Table 6-1 shows the estimated percent reductions in gas energy consumption for each residential treatment, based on the lagged dependent variable (LDV) model discussed in Section 5. P-values for the coefficient estimates from the regression models are also displayed. Results were also estimated based on the fixed and random effects models discussed in Section 5. Overall, the results based on the three different models were similar, although there were differences in terms of the degree of statistical significance in some cases. For reasons discussed in Section 5, we believe that the LDV model is best for this particular analysis. As also mentioned in Section 5, the data used for model estimation covered the months of November through March.

Table 6-1: Estimates of Percent Reductions in Gas Energy Consumption for All Residential Treatments and Models, November 2013 through March 2014 (Statistically Insignificant¹⁴ Results are in Gray)

Usage Stratum	Opower Screen	My Account	Treatment	Group	Number of Treatment Customers	Lagged Dependent Variable Model	
						% Reduction	P-value
Medium/ High	Passed	Yes	Email HER	T-3	10,942	1.37%	0.00
			Paper & Email HER	T-2	10,890	1.54%	0.00
			Default BTA	T-4	21,909	0.70%	0.02
		Opt-in BTA	T-5A	43,964	0.23%	0.34	
		No	Paper-only HER	T-1	23,018	1.58%	0.00
			Opt-in BTA	T-5B	88,803	0.20%	0.21
	Did Not Pass	Yes/No	Opt-in BTA	T-5D	6,688	-1.19%	0.31
	Not Screened		Opt-in BTA	T-5C	12,893	-2.44%	0.00
Low	Not Screened	Yes/No	Opt-in BTA	T-6	45,474	-0.60%	0.12

The estimates in Table 6-1 are interpreted as the average percent reduction in daily gas usage (therms) due to exposure to the treatment, regardless of the percentage of customers that actually enrolled (or remained enrolled) in the treatment throughout some or all of the conservation campaign. Therefore, for the opt-in BTA customers, these estimates *do not* represent the local average treatment effect (LATE) discussed in Section 5. What is most important is the overall savings for customers offered a treatment, which is what these impacts represent. Furthermore, since none of the opt-in treatment cells show statistically significant impacts (except for group T-5C, which is dismissed for reasons

¹⁴ Statistically insignificant means that the estimated reduction is not statistically different from zero.

discussed below), grossing up these intention-to-treat impacts based on enrollment to obtain the LATE impacts could be misleading since they would appear large, but would still not be statistically significant.

6.1.1 Residential Default Treatments

Three different default treatments were offered to My Account customers:

- Email HERs (group T-3);
- An email/paper HER combination (group T-2); and
- BTAs (group T-4).

A fourth default treatment cell delivered paper-only HERs to non-My Account customers (group T-1).

As seen in Table 6-1, all four of these default treatments produced percent reductions in gas usage that were highly statistically significant. Among the three default treatments offered to My Account customers, the two HER treatments produced gas savings of roughly 1.5% and the BTA treatment produced gas savings of roughly 0.7%. The default HER treatment for non-My Account customers produced similar usage changes, 1.6%, as did a similar treatment for My Account customers.

6.1.2 Residential Opt-in Treatments

Only BTA was offered on an opt-in basis. BTA was offered to the following customer segments:

- My Account customers that passed the Opower screen (group T-5A), which makes these results comparable to three of the default treatments summarized above;
- Non-My Account customers that passed the Opower screen (group T-5B);
- Medium/high usage customers (including both My Account and non-My Account customers) that either did not pass the Opower screen (group T-5D) or were not subject to the screen (group T-5C); and
- Low usage customers (both My Account and non-My Account) that were not subject to the Opower screen (group T-6).

None of these customer segments are directly comparable to each other, but represent segments of interest.

As seen in Table 6-1, only one of the opt-in treatment groups showed statistically significant impacts, group T-5C, and this group showed an increase in gas usage, not a reduction. However, further analysis showed that this percent difference was present prior to customers enrolling in the BTA program – that is, the impact showed up before the treatment went into effect. This strongly suggests that the increase in usage is due to random variation as opposed to the treatment itself. Put another way, the experiment failed for this treatment group and the results should be ignored.

None of the other opt-in BTA treatment groups showed statistically significant impacts. This does not necessarily mean that those who received the BTA information did not respond to the treatment, only that the change in usage (if any) for those who enrolled combined with the relatively low enrollment rate for these treatment groups did not produce a large enough change in usage to be detected. This is

not surprising given the relatively low enrollment rates compared with default treatments, as seen in Table 4-1. Groups T-5B, T-5C and T-5D achieved an enrollment rate of roughly 10% by the end of the analysis period (and enrollment was much lower for most of the analysis period) and group T-5A saw enrollment of roughly 17% by the end of the analysis period. Although these enrollment rates are quite high for an opt-in program, they are low from the perspective of being able to detect treatment effects. With such low enrollment rates, to detect a 1% impact for the treatment group as a whole, those who enrolled would have had to reduce gas usage by 5% to 10% in response to the BTA information. Based on the findings here, it does not appear that those who did enroll reduced usage by that magnitude in response to BTA information.

6.2 Results for SMB Customers

Table 6-2 shows the estimated percent reductions in gas energy consumption for the two SMB treatments. The default BTA treatment did not deliver a statistically significant result. The results for the opt-in BTA treatment suggest that customers increased their usage in response to opt-in BTA. However, these results are based on a matched control group, not random assignment. Therefore, the confidence bands (and statistical significance) of the results are less accurate because the standard errors do not incorporate uncertainty in the matching process. In addition, enrollment in SMB opt-in BTA was around 4% or less throughout most of the conservation campaign, so it is highly unlikely that such a large effect was driven by the relatively few customers who were exposed to the treatment. Given these considerations, we conclude that the impact of opt-in BTA on gas usage for treatment group T-7B was effectively zero.

Table 6-2: Estimates of Percent Reductions in Gas Energy Consumption for All SMB Treatments and Models, November 2013 through March 2014 (Statistically Insignificant Results are in Gray)

My Account?	Treatment	Group	Number of Treatment Customers	Lagged Dependent Variable Model	
				% Reduction	P-value
Yes	Default BTA	T-7A	3,714	-0.16%	0.97
No	Opt-In BTA	T-7B	12,121	-2.21%	0.02

6.3 Estimated Gas Savings

As discussed in Section 3.3, once a statistically significant usage reduction within a given test cell is identified, the analysis can be done at the monthly level, which allows for the re-inclusion of some customers that may not have had usage data for every month, but do have data for some pre- and post-treatment months. Table 6-3 summarizes the estimated gas savings for the 2013-2014 SoCalGas Conservation Campaign, based on the monthly-level analysis. Gas savings are only calculated for the treatments that produced statistically significant usage reductions using the LDV model, which includes the four default treatments for residential customers. In total, nearly 200,000 therms were conserved as a result of the 2013-2014 Conservation Campaign. Roughly 43% of these savings came from treatment group T-1 (paper-only HER for non-My Account customers), which had the highest percent reduction and the largest number of participants among the four default treatments for residential

customers. Nearly 19% of the total energy savings were produced by the default BTA treatment (T-4). The remaining 38% of gas savings were split roughly evenly between the two HER treatments for My Account customers (T-2 and T-3). Overall, these four default treatments produced gas savings of 1.3%, which shows progress toward the 1% savings goal that SoCalGas would like to achieve.

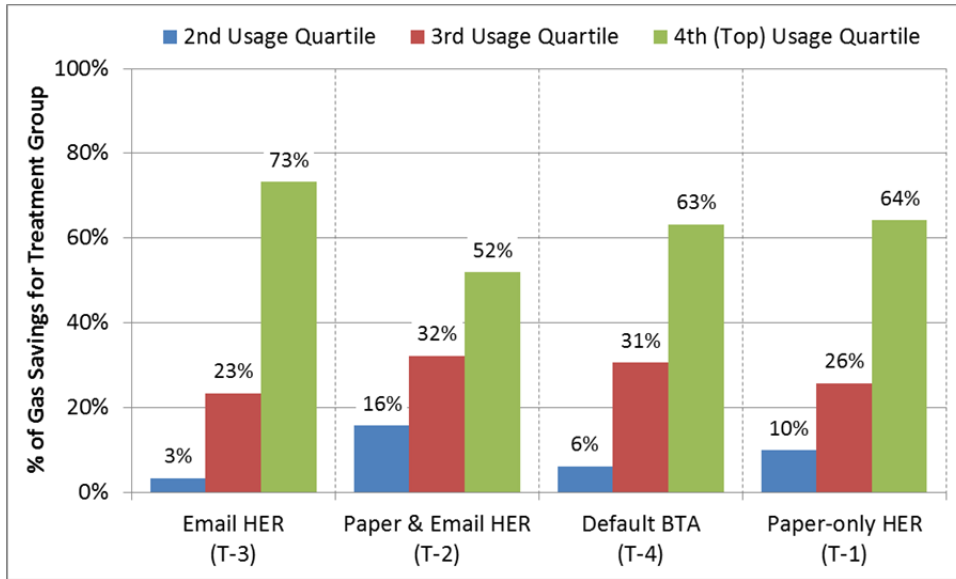
Table 6-3: Estimated Gas Savings for the 2013-2014 SoCalGas Conservation Campaign

Treatment	Group	Number of Active Customers per Month	Average Customer Total Usage for November through March			Aggregate Usage for November through March		
			Reference Therms	Observed Therms	Therms Saved	Reference Therms	Observed Therms	Therms Saved
Email HER	T-3	11,387	217.9	214.6	3.2	2,480,648	2,443,937	36,711
Paper & Email HER	T-2	11,374	218.2	214.8	3.4	2,481,568	2,442,628	38,940
Default BTA	T-4	22,841	217.8	216.2	1.6	4,975,764	4,939,173	36,591
Paper-only HER	T-1	23,552	219.6	216.1	3.6	5,172,610	5,088,553	84,057
Overall		69,154	218.5	215.7	2.8	15,110,589	14,914,290	196,299

As input to planning for next year’s conservation campaign, it is useful to examine how gas savings vary across customer segments. If some segments respond little to the information treatments and others response strongly, it will be more cost-effective to focus future campaigns on segments that are more responsive to the information offerings.

One potentially useful segmentation scheme is by usage. As previously discussed, default treatments were only tested for the top three usage quartiles. As seen in Figure 6-1, the second lowest usage quartile (quartile 2) produced a small percentage of the overall therm savings for the residential default treatments. Even though customers in quartile 2 account for one-third of each treatment group, the gas savings for those customers range from only 3% to 16% of the overall savings for treatment. In fact, both the magnitude of savings and percent savings consistently increase as usage increases. Given this, as discussed in Section 7, we recommend that SoCalGas focus the next Conservation Campaign only on customers in the top two usage quartiles.

Figure 6-1: Percent of Gas Savings Attributable to Each Usage Quartile



Another potentially useful segmentation for future consideration is by CARE status. Among the four default treatments, CARE customers accounted for around 30% of My Account customers and 34% of non-My Account customers. Figure 6-2 shows the percent reduction in gas usage for the residential default treatments by CARE status. The email HER and default BTA treatments did not have a statistically significant impact on gas usage for CARE customers, which may indicate that CARE customers are not responsive to these specific forms of information feedback through email. The two default treatments that included information feedback through direct mail (groups T-2 and T-1) showed a statistically significant reduction in gas usage for CARE customers, albeit a lower percent reduction relative to that of non-CARE customers for the paper-only HER treatment. SoCalGas will monitor these trends in next year’s analysis to see if they still hold true. If so, SoCalGas may want to consider exploring alternative treatment approaches for CARE customers in future Conservation Campaigns.

**Figure 6-2: Percent Reduction in Gas Usage by CARE Status
(Statistically Insignificant Results are in Gray)**

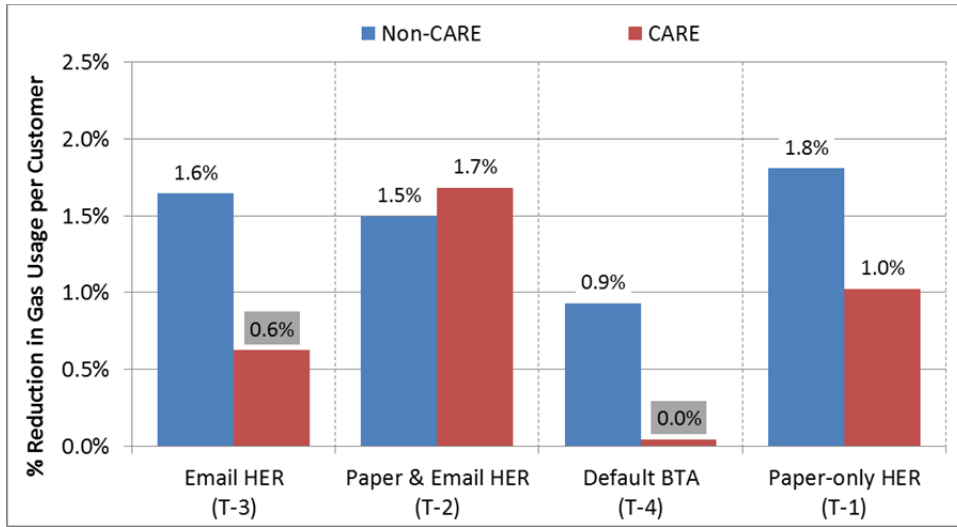
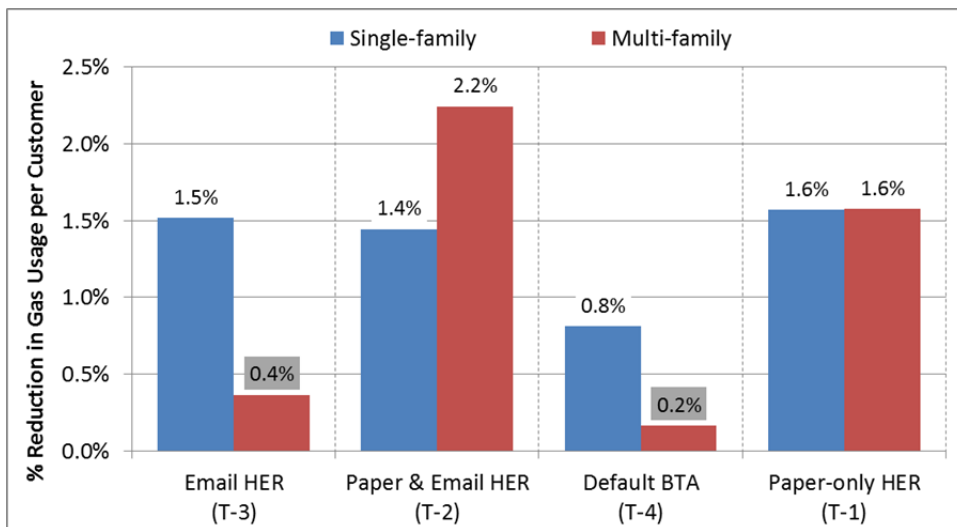


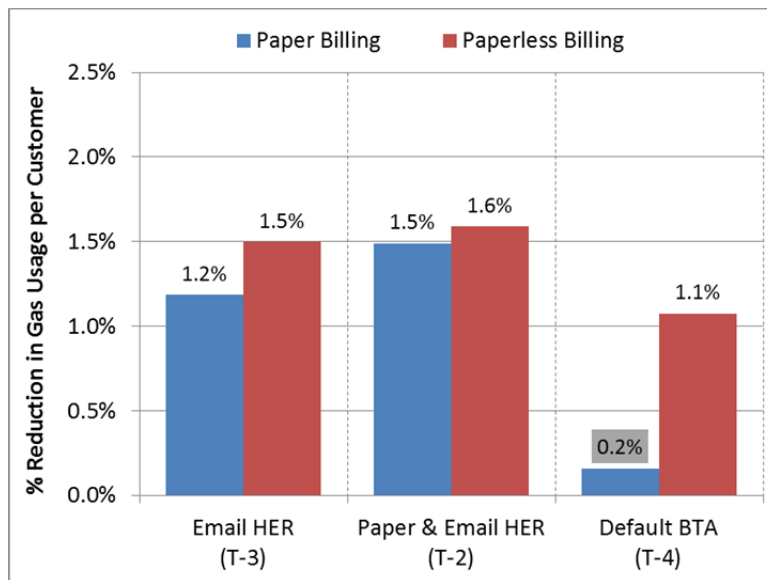
Figure 6-3 compares the percent reductions in gas usage for single-family homes relative to multi-family homes. The results show a similar pattern to those of the CARE segmentation. As with customers on CARE, customers who live in multi-family homes were not responsive to these forms of information feedback through email. The email HER and default BTA treatments did not have a statistically significant impact on gas usage for multi-family homes, while the two treatments with paper HERs did. Considering that multi-family homes account for roughly 20% of medium/high usage customers, SoCalGas will also monitor this trend in next year’s analysis to see if it still holds true. If so, SoCalGas may also want to factor this into future Conservation Campaigns.

**Figure 6-3: Percent Reduction in Gas Usage by Housing Type
(Statistically Insignificant Results are in Gray)**



Billing method (paper or paperless) for My Account customers was the final population segment that was large enough to allow estimates to be developed for each sub-segment. In the study population, around 59% of My Account customers were on paperless billing (only 6% of non-My Account customers were on paperless billing, so segmenting results for the non-My Account treatments was not appropriate). Figure 6-3 shows the percent reduction in gas usage for the My Account default treatments by billing method. The percent gas savings were lower for customers on paper billing for all default treatments. In particular, customers on paper billing did not show a statistically significant usage reduction for default BTA. SoCalGas will monitor these trends in next year’s analysis to see if they still hold true. If so, SoCalGas may want to consider avoiding the default BTA treatment for paper billing customers in future Conservation Campaigns.

Figure 6-3: Percent Reduction in Gas Usage by Billing Method for My Account Customers (Statistically Insignificant Results are in Gray)



7 Recommendations for 2014-2015 Conservation Campaign

Throughout the AM rollout until the end of 2017, SoCalGas is implementing a cycle of innovation in which continuous assessment and improvement in the performance of feedback programs is the objective. This is referred to as the “test and learn” process, which is consistent with what the CPUC envisioned in D.10-04-027, which approved SoCalGas’ AM application, as discussed in Section 2. As implementation proceeds, high performing program design options will be retained and offered to an increasingly larger share of customers who receive AMs. At the same time, new program design alternatives will be tested based on the experiences gained from the prior round of implementation. Programs and program design features that are less effective will be abandoned or modified. In this way, over the course of the AM rollout, the most effective means for encouraging energy savings from information feedback will be identified and offered to customers.

As discussed in Section 2.3, the results in this evaluation must be understood within the context of the 2013-2014 winter because it was the warmest on record in California. It is unclear what effect (if any) this unseasonably warm weather had on the energy savings that resulted from the information feedback treatments, considering that similar treatments were not available in prior years. The upcoming Conservation Campaigns will provide an opportunity to assess how the absolute and percent energy savings vary under different weather conditions. This body of evidence will allow SoCalGas to more conclusively finalize its information feedback strategy after the AM rollout is complete at the end of 2017.

Furthermore, a fundamental tenant of the “test and learn” process is to continuously improve toward more cost-effective solutions. While the 2013-2014 results for the residential default treatments are encouraging, it may be possible to produce comparable (or higher) energy savings at a lower cost. Therefore, to test ways of improving cost-effectiveness, the 2014-2015 Conservation Campaign will adjust the program offerings as follows:

- Continue and expand Opower HER treatments, including some refinements and testing of a year-round option (the default BTA and Aclara HERs described below will also be tested on a year-round basis);
- Include a test of Aclara HERs, which differ from the prior HERs offered by Opower in that they include different conservation messages, have more AM-specific content and an emphasis on driving customers to the SoCalGas.com, My Account-based *Ways to Save* online tools and other conservation/energy efficiency programs as appropriate;
- Continue and expand default BTA, but with fewer direct mail communications, which are relatively costly (if comparable energy savings can be achieved without those costly communications, then cost-effectiveness will improve);
- No longer offer BTA on the opt-in basis, due to the high acquisition cost and relatively low enrollment rates;
- For the 2013-2014 HER treatments, continue to track and measure energy savings in order to determine whether savings persist even if SoCalGas no longer sends HERs to those customers; and

-
- For the 2013-2014 BTA treatments, continue to track and measure energy savings in order to determine whether savings persist, even if SoCalGas no longer sends accompanying email and direct mail communications.

In addition, the 2014-2015 Conservation Campaign will be able to take advantage of an expanded AM footprint, which now includes nearly 2 million residential customers (an incremental 1.1 million residential customers after applying some initial screens, including the removal of customers who participated in the 2013-2014 Campaign). Therefore, SoCalGas will have sufficient numbers of customers to improve its targeting strategy as follows:

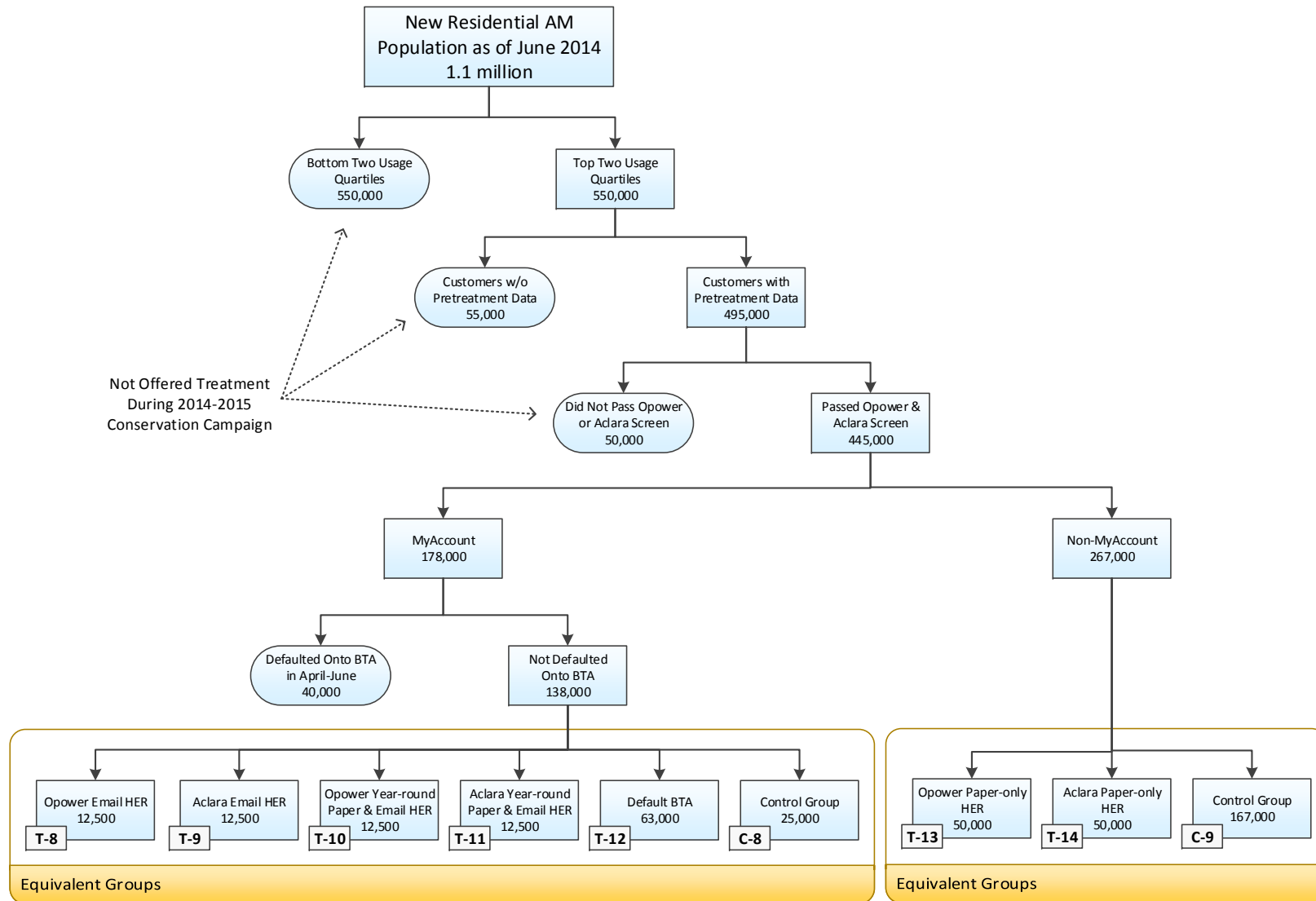
- Focus on the top two usage quartiles; and
- Only include customers who have pretreatment data from October 2013 through March 2014.

Finally, SoCalGas will exclude SMB customers from upcoming Conservation Campaigns until there are sufficient numbers of customers to conduct a valid RCT of default treatments.

Based on these recommendations, Figure 7-1 summarizes the preliminary residential treatment and control group assignments for the 2014-2015 Conservation Campaign. This preliminary design is based on estimates of how many customers will pass through each step and will be finalized once the data analysis is conducted. With the prior year's treatment and control group customers set aside (and some additional screens), there are 1.1 million available AM-billed residential customers, which are customers that received their AM between September 2013 (the eligibility date for the 2013-2014 Campaign) and June 2014. With these 1.1 million customers, the first step is to identify the top two usage quartiles, which reduces the population to 550,000 high usage customers. Then, an estimated 10% of customers who do not have pretreatment usage data going back to October 2013 are screened out. Similarly, around 10% of customers are expected to not pass the Opower and Aclara eligibility screens. By requiring that customers pass *both* screens in order to be eligible for *any* of the treatments, it ensures that any differences in energy savings are attributable to the treatment characteristics, rather than differences in the underlying population. Of the estimated 445,000 customers that pass the Opower and Aclara eligibility screens, 40% are expected to be My Account customers. However, SoCalGas already defaulted roughly 40,000 of these customers onto BTA in April through June 2014, so those customers must be removed.¹⁵ Finally, there are 138,000 remaining My Account customers and 267,000 remaining non-My Account customers to be assigned to treatment and control groups, as indicated in the figure. At the end of the 2014-2015 Conservation Campaign, SoCalGas will be able to directly compare the energy savings that result from five different treatments for My Account customers and two different treatments for non-My Account customers.

¹⁵ In total, SoCalGas defaulted 50,000+ customers onto BTA in April through June 2014, but the number used here is 40,000 customers because we estimate that roughly 20% of those customers would have been screened.

Figure 7-1: Preliminary Residential Treatment and Control Group Assignments for the 2014-2015 Conservation Campaign¹⁶



¹⁶ Proposed test cell distributions are preliminary and subject to further change and refinement.

Appendix A Additional Home Energy Report Materials

In addition to the paper and email HER examples in Section 2.2, Opower sent a HER welcome insert and a door hanger, which are included in this appendix. Figure A-1 shows the front of the HER welcome insert, which was delivered to nearly 25,000 paper-only HER customers and 12,500 paper & email HER customers in October/November 2013. Figure A-2 shows the back of the HER welcome insert. Finally, Figure A-3 displays the door hanger that was delivered to all of the HER customers.

Figure A-1: HER Welcome Insert (Front)



Say hello to your first Home Energy Report

Learn about your home's gas use, see how you compare to your neighbors and learn ways to save money.



(877) 959-7188 | amcic@socalgas.com

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SCG_0005_WELCOME_NEI

Figure A-2: HER Welcome Insert (Back)



Introducing Your Home Energy Report

About the Program

Your Personalized Report

This report and others to come are part of a program designed to help you save energy and money. Millions of households are already enrolled in similar report programs nationwide. Collectively, these programs have saved hundreds of millions of dollars. If you're ready to start saving on your gas bill, this program is for you.

Your Neighbor Comparison

In your reports, you can see your current gas use compared to approximately 100 nearby, occupied homes with similar characteristics — such as square footage and heating system. These homes represent your neighbors, but do not necessarily include the homes on your block or in your immediate neighborhood. These comparisons, along with personalized energy saving tips, can help you better understand how you use gas.

Your Home Information

The comparisons and tips in your reports are personalized for you by using publicly available information about your home size, home type and other characteristics. To find more information about your custom analysis and advice, visit SCG.opower.com.

Your Personal Information

We only use your information to provide useful insights about your gas use. Your information is compiled anonymously and not shared with any of your neighbors. Only you can see your personal data.

Figure A-3: HER Door Hanger

Front



Back



Appendix B Bill Tracker Alert Messaging for Subscribers

This appendix includes the email and direct mail messaging that SoCalGas sent to residential BTA subscribers, which includes the default BTA customers and the opt-in BTA customers that enrolled. The emails were only sent to My Account customers. These materials are presented in chronological order from October 2013 through March 2014. Default BTA customers received all of these materials, whereas opt-in BTA customers only started receiving these materials if/when they enrolled in BTA. Therefore, the October 2013 mailings only included default customers, since few customers had opted into BTA at that point. For SMB customers, there were slightly different versions of this messaging, but to be concise, only the residential versions are included.

B.1 October 2013 (Default Customers Only)

Figure B-1: October Email for BTA Subscribers (Sent on October 9)
(Subject Line: "Bill Tracker Alerts Helping You Manage Gas Usage")

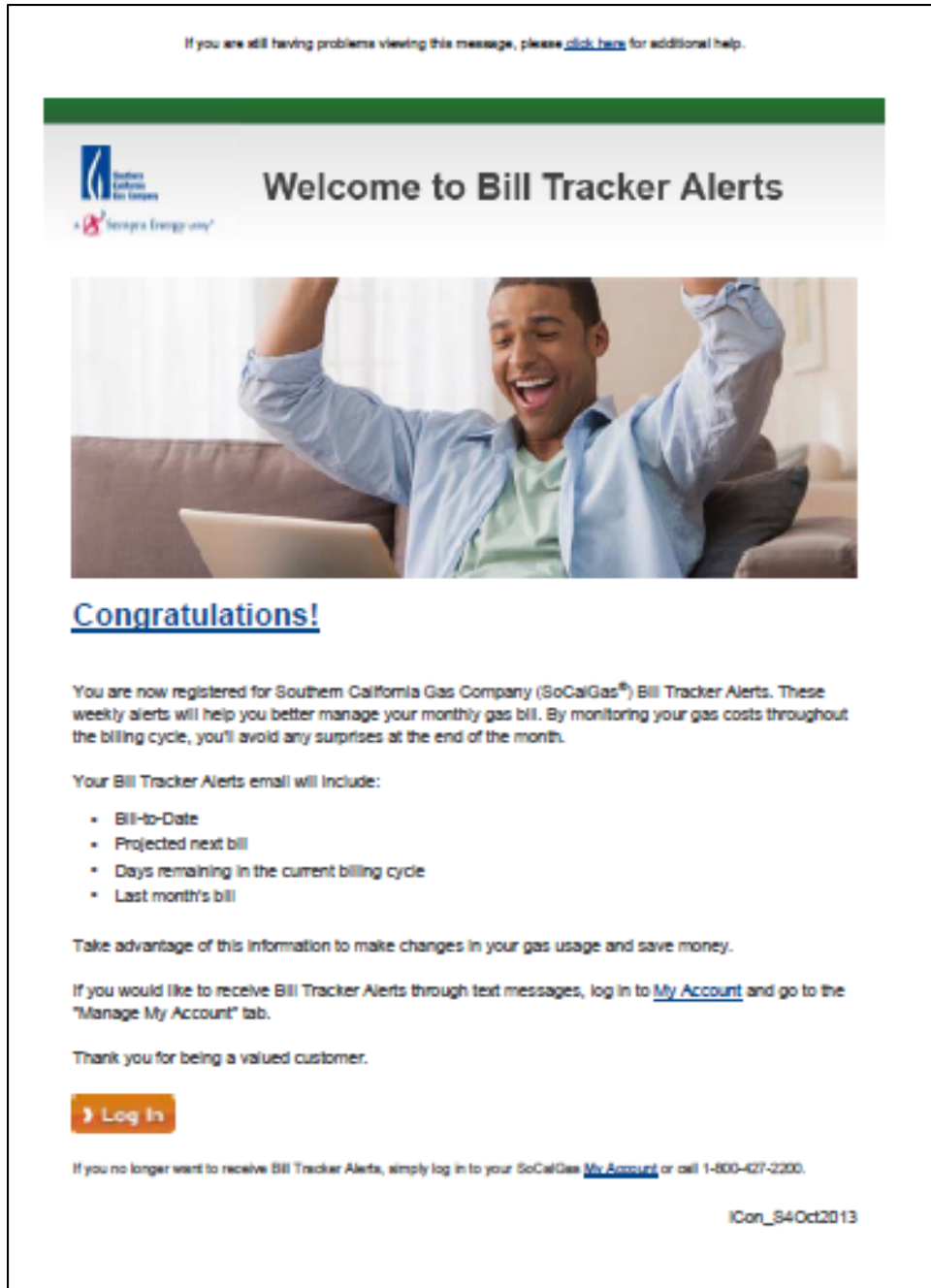


Figure B-2: October Direct Mail for BTA Subscribers (Sent on October 14)




A  Sempra Energy utility*

WELCOME TO BILL TRACKER ALERTS

See how you can save money!

Introducing Bill Tracker Alerts

Congratulations, you are now registered for Southern California Gas Company (SoCalGas®) Bill Tracker Alerts. These weekly alerts will help to better manage your monthly gas bill. By monitoring your gas costs throughout the billing cycle, you'll avoid any surprises at the end of the month!

Your Bill Tracker Alerts will include:

- Bill-to-date
- Days remaining in the current billing cycle
- Projected next bill
- Last month's bill

Take advantage of all this information to make changes in your gas usage and save money.


If you would like to receive Bill Tracker Alerts through text messages, log in to myaccount.socalgas.com and go to the "Manage My Account" tab to manage your preferences. If you no longer want to receive Bill Tracker Alerts, simply log into your SoCalGas My Account or call 1-800-427-2200.


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B.2 November 2013

Figure B-3: November Email for BTA Subscribers (Sent on November 21)
(Subject Line: "Save More This Winter")

 **Bill Tracker Alerts**



Save more this winter

For account number: *****09991

We're committed to helping you save.

Conserve more with Bill Tracker Alerts
With Bill Tracker Alerts, you're on your way to tracking down savings! Your weekly alerts keep you up to date on your natural gas usage and help prevent any surprises on your monthly bill. To discover even more ways to conserve, visit our online [Buyers Guide](#).

My Account Ways to Save
To find additional online savings tools, visit [My Account](#), where you can:




- Set savings goals and get tips on how to achieve them
- Create a personalized energy profile
- View your daily or hourly gas usage
- Analyze differences between monthly bills to understand your gas usage

Start saving more today! Log in to [My Account](#) and click on Ways to Save.

[Log In](#)

Bill Tracker Alerts are also available via text message. Log in to [My Account](#) and go to the "Manage My Account" tab to change your preferences. If you no longer want to receive Bill Tracker Alerts, simply log into your SoCalGas My Account or call 1-800-427-2200.

iCon_B6ANov2013

Connect with us:   

[soocalgas.com](#) | [Ways to Save](#) | [Pay Bill Online](#) | [Rebate Programs](#)



 [Forward This Email](#)


Figure B-4: November Direct Mail for BTA Subscribers (Sent on November 22-27)


A Sempra Energy company

November 20, 2013

Javier Loyola Duran
6015 Gallant St.
Bell Gardens, CA 90201-5507

1/0000001



**Saving More
is Within Reach
Visit My Account now**

RE: 6015 Gallant St Bell Gardens, CA 90201-5507

Dear Javier Loyola Duran:


Southern California Gas Company (SoCalGas®) is committed to helping you save.


Continue to monitor your gas usage with Bill Tracker Alerts and you're on your way to tracking down savings. To understand your usage even better, visit My Account Ways to Save, your online savings tool.

- Set savings goals and get tips on how to achieve them.
- Create a personalized energy profile.
- View your daily and hourly gas usage.
- Analyze your monthly bill history to understand how different factors affect your natural gas usage.

Visit socialgas.com, log in to My Account and click on Ways to Save.

Start saving more today!

Sincerely,

Patrick Petersilia
Director, Advanced Meter Project




P.S. Bill Tracker Alerts are also available via text message. Log in to myaccount.socialgas.com and go to the "Manage My Account" tab to change or add your preferences.

If you no longer want to receive Bill Tracker Alerts, simply log into your SoCalGas My Account or call 1-800-427-2200.

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Adv_54Nov2013

Figure B-5: November “Ways to Save” Insert (Included in November 22-27 Mailing)



Southern
California
Gas Company

SAVE ENERGY THIS WINTER

A  Sempra Energy utility

3 easy “Ways to Save” this winter:

- #### 1 WASH IN COLD WATER

 - Save approximately 80-90 percent on energy used to wash clothes by using only cold water. This could be your easiest and most effective way to save energy.
 - Consider using a clothes washing detergent that is specially formulated to clean in cold water.
 - Need a little extra cleaning power? Stop the cycle after the tub fills with water. Let the load pre-soak for a while and give it some extra cleaning time.
- #### 2 ADD EXTRA LAYERS

 - Bundle up and stay warm this winter. Save up to 30 percent on heating by lowering your furnace thermostat by 3 to 5 degrees (health permitting).
 - Install a programmable thermostat to help automatically regulate your home’s temperature for comfort control and energy savings.
- #### 3 WINTERIZE YOUR HOME


 - Do something about the draft! It’s a sign of significant air leakage that can usually be sealed quite easily. Visually inspect your home for gaps every year to find those smaller problems before they become bigger ones.
 - Caulking works best for gaps that are 1/2 inch or smaller. For larger gaps, you can use a foam sealant that comes in a spray can.

(Continued on back)

USE OUR NEW ONLINE TOOLS TO SAVE EVEN MORE!


Visit **My Account “Ways to Save,”** your online savings tool.

- Set savings goals and get tips on how to achieve them.
- Create a personalized energy profile.
- View your daily and hourly gas usage.
- Analyze your monthly bill history to understand how different factors affect natural gas usage.



New “Ways to Save” Tools

Please visit socalgas.com.



Southern
California
Gas Company



A Sempra Energy utility

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B.3 December 2013

Subscribers did not receive any messaging in December.

B.4 January 2014

Figure B-6: January Direct Mail for BTA Subscribers (Sent on January 16)

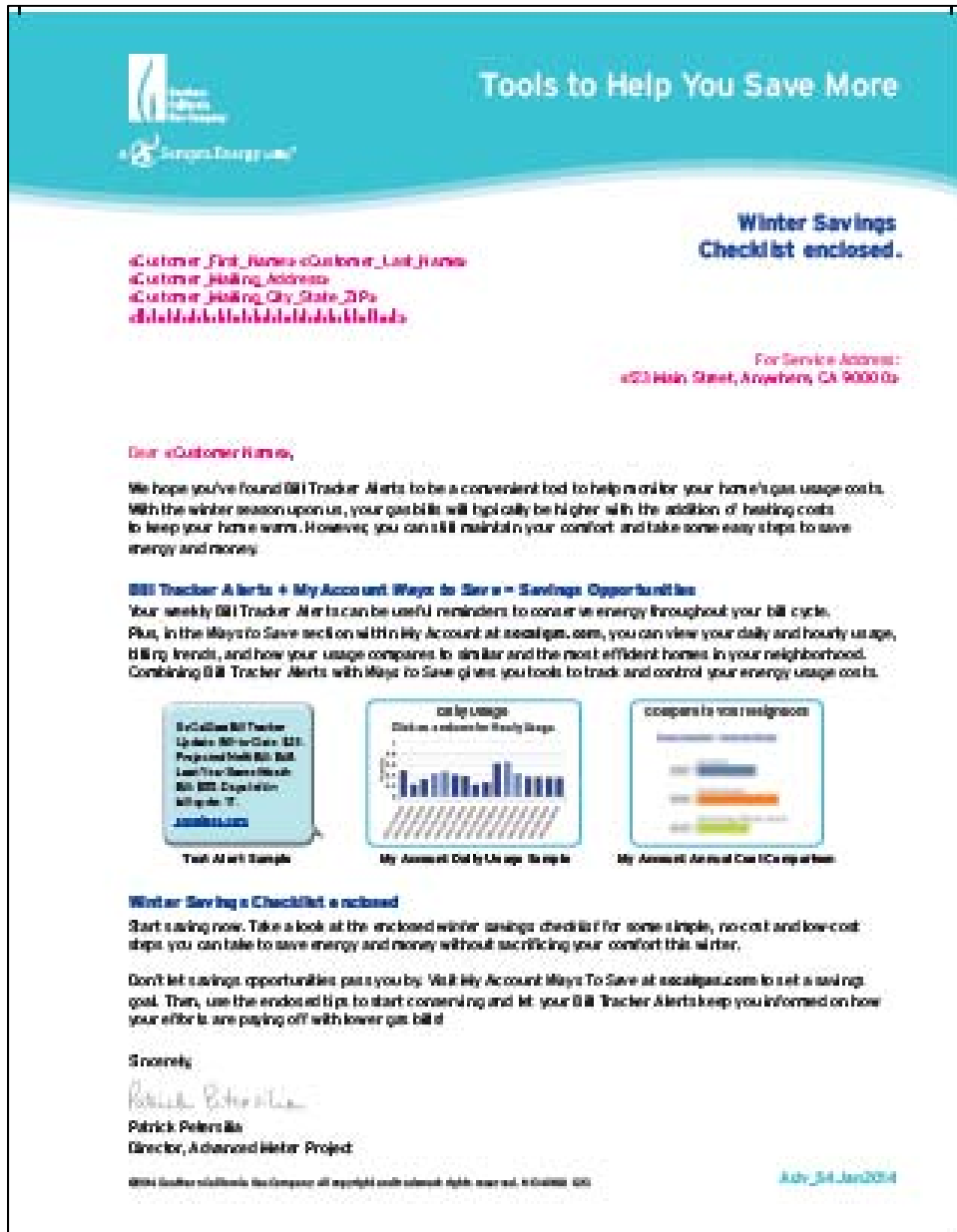




Figure B-7: January “Winter Savings Checklist” – Front
(Included in January 16 Mailing)

SoCalGas Customer Service
1-800-427-2200
socalgas.com




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A  Semptra Energy utility

WINTER SAVINGS CHECKLIST

Start saving on your gas bill today!

Here are some simple, no-cost and low-cost steps you can take to lower your natural gas usage and reduce your bill without sacrificing your comfort:

- Take the guesswork out of your monthly bill by signing up for weekly Bill Tracker Alerts at billtracker.socalgas.com. You will need your Southern California Gas Company (SoCalGas®) account number.
- Set your thermostat to 68°F when you're home and lower it to 58°F when you're away. Consider adding an extra blanket to the bed to keep comfortable while sleeping at the lower temperature.
- Check your heating and cooling system filters every month. Clean filters can significantly improve the energy efficiency of your system.
- Keep heating vents clear. Vents blocked by rugs and furniture prevent heated air from circulating efficiently.
- Set your water heater's temperature to 120°F. You'll want to check the owner's manual for safety instructions before changing any settings.

SoCalGas Bill Tracker Update. Bill-to-Date: \$25. Projected Next Bill: \$40. Last Year Same Month Bill: \$60. Days left in bill cycle: 17. socalgas.com

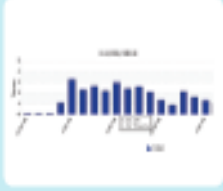
Text Alert Sample




Figure B-8: January “Winter Savings Checklist” – Back
(Included in January 16 Mailing)

My Account Ways to Save


tools available on socalgas.com



Now you can monitor and manage your business' natural gas consumption by the day or hour, which will help you see how much energy you are using and when you're using it. Plus, you'll be able to access this information online 24/7.

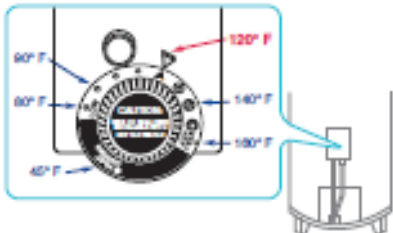


See what equipment in your business makes up the majority of your natural gas usage. Complete the “Energy Profile” and receive even more detailed information about your usage.




See how your business' usage compares to other businesses in your industry of similar size and location and the most energy-efficient businesses in your area.


- Test, clean and adjust your equipment by a qualified, licensed technician.
- Perform routine maintenance recommended by the manufacturer, according to the owner's manual. This includes replacing dirty air filters and cleaning intake screens, condenser coils, supply registers and return grills.
- Keep heating vents clear. Vents blocked by rugs and furniture prevent heated air from circulating efficiently.
- Identify and repair leaky or disconnected ducts.
- Caulk cracks around windows, doors and other openings.
- Adjust programmable thermostats to turn heating on 30 minutes before employees/ customers arrive and off 30 to 60 minutes before they leave. Set thermostats no higher than 68°F during occupied periods in winter.
- Close curtains, shades and blinds at night and during unoccupied periods to help your building retain heat. Keep them open on sunny days.
- Set your water heater's temperature to 120°F. You'll want to check the owner's manual for safety instructions before changing any settings.



- Wrap water heater and pipes. Unless you have a newer water heater that already has built-in insulation, covering your water heater tank with an insulated “jacket” (\$17-\$20) will keep costs down, especially if your water heater is in an unheated space, like a warehouse or shop.

Figure B-9: January Email for BTA Subscribers (Sent on January 22)
(Subject Line: "How much more can you save?")

 **Bill Tracker Alerts**



How much more can you save?

Account number: *****% ACCOUNT_NUMBER%

Bill Tracker Alerts + My Account Ways to Save = Savings Opportunities

You already know how weekly Bill Tracker Alerts allow you to spot monthly usage trends. Now you can add that know-how to our online tools and save even more energy and money.


Simply log in to [My Account](#) and click on Ways to Save to see:

- Daily and hourly gas usage charts
- Monthly billing trends
- Your annual energy costs compared to similar homes in your neighborhood
- Savings tips that best suit your goals and living habits

Don't let savings opportunities pass you by. Visit [My Account](#) and click on Ways to Save today!

[Log In](#)

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Connect with us:   

[soucalgas.com](#) | [Ways to Save](#) | [Pay Bill Online](#) | [Rebate Programs](#)

 [Forward This Email](#)

If you received this email from a friend or a colleague [subscribe now](#).

B.5 February 2014

Figure B-10: February Email for BTA Subscribers (Sent on February 12)
(Subject Line: "Tools and Tips to help you save energy and money")

 **Bill Tracker Alerts**



Tools and tips to help you save energy and money

For account number: <account_number>

Weekly Bill Tracker Alerts help you monitor your natural gas usage costs and with our [Ways to Save](#) online tools, you'll have even more help saving energy and money.

Simply log in to [My Account](#):

- Set a savings goal and receive conservation tips to help achieve it.
- Take our quick online energy survey to discover new ways to save.
- Compare your home's usage to similar size homes in your neighborhood.

Get started saving energy and money today!
Log in to [My Account](#) and click on [Ways to Save](#).

[Log In](#)

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Connect with us:   

[accounts.com](#) | [Ways to Save](#) | [Pay Bill Online](#) | [Service Requests](#)

 [Forward This Email](#)

If you received this email from a friend or a colleague [unsubscribe.com](#)

Figure B-11: February Direct Mail for BTA Subscribers (Sent on February 12)



A Semptra Energy utility

**Energy and money savings
are just a click away.
Visit socialgas.com today.**

«Customer_Name»
«Customer_Mailing_Address»
«Customer_Mailing_City_State_ZIP»
«XXXXXXXXXXXXXXXXXXXXXXXXXXXX»

Dear «Customer Name»,

We're here with tools and tips to help you save energy and money!

Along with your weekly **Bill Tracker Alerts** to help you monitor your natural gas usage costs, you also have several online tools available to help you save energy and money.

Visit socialgas.com, log into **My Account** and click on **Ways to Save** where you can:

- Set a savings goal and receive conservation tips to help achieve it.
- Discover where you might be able to save through our online energy survey.
- See how your home's usage compares to similar size homes in your neighborhood.
- Review your daily and hourly usage information.



My Account Daily Usage Sample



My Account Annual Cost Comparison

Get started saving energy and money today!

Sincerely,



Jeffery L. Walker Sr.
Director, Advanced Meter Project


P.S. Bill Tracker Alerts are available via text message and email. If you'd like to receive alerts in your inbox as well as your wireless phone, log in to myaccount.socialgas.com and go to the Manage My Account tab to change your preferences. Don't forget to check out the Ways to Save section for tools and tips to save energy and money.


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B.6 March 2014

Figure B-12: March Email for BTA Subscribers (Sent on March 12)
(Subject Line: "Helping you save more")

 **Bill Tracker Alerts**



Helping you save more

For account number: *****%account_number%%


We're committed to helping you save.

Conserve more with Bill Tracker Alerts
With Bill Tracker Alerts, you're on the way to tracking down savings! Your weekly Bill Tracker Alerts keep you up to date on your natural gas usage and help prevent any surprises on your monthly bill.




My Account Ways to Save
To find additional online savings tools, visit My Account, where you can:

- Set savings goals and get tips on how to achieve them
- Take our quick online energy survey to discover new ways to save
- View your daily or hourly gas usage
- Compare your home's usage to similar size homes in your neighborhood.

Start saving more today!
Log in to [My Account](#) and click on **Ways to Save**.

 Log in

IconS4A_Mar2014

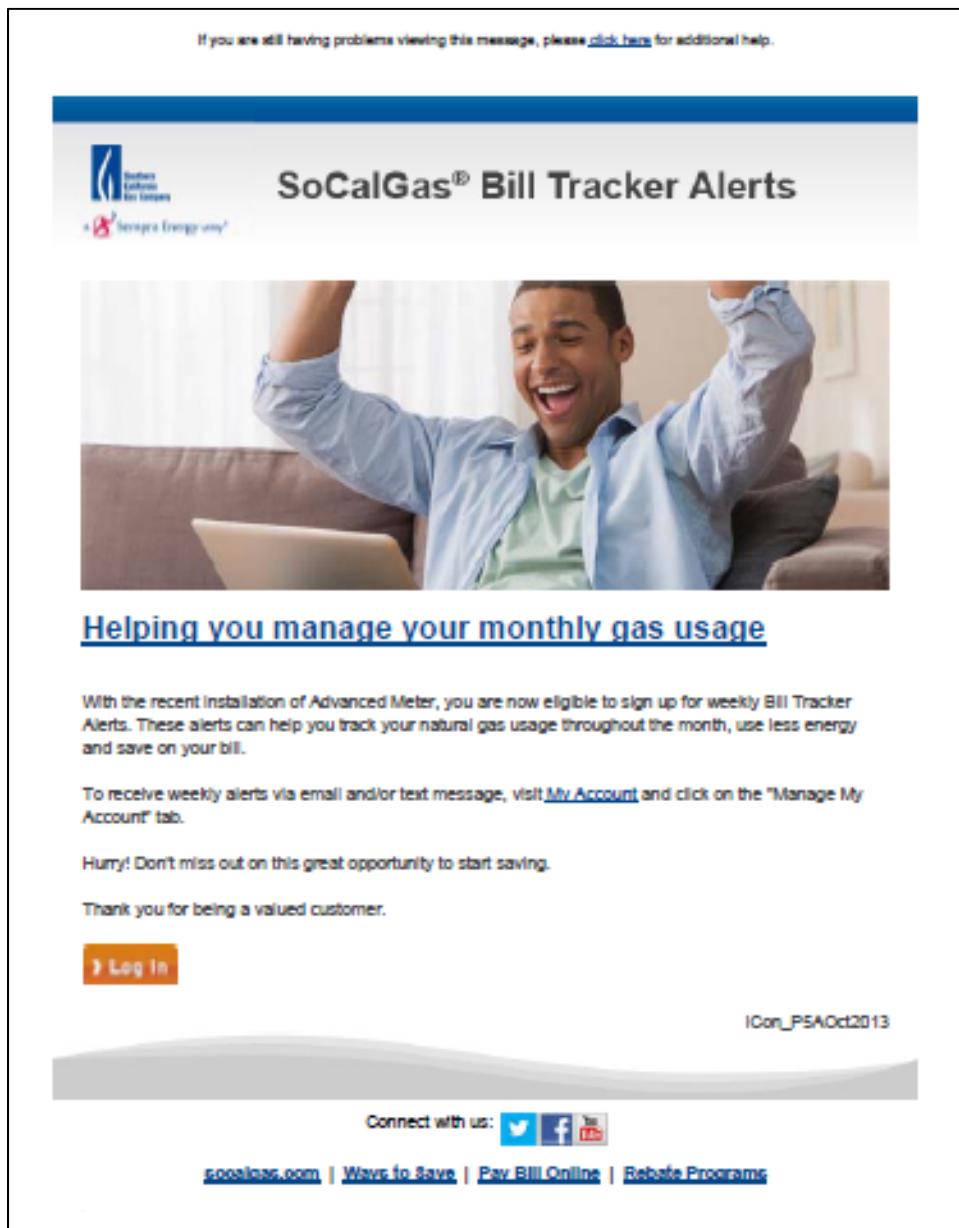
Connect with us:   

Appendix C Opt-in Bill Tracker Alert Promotional Materials

This appendix includes the email and direct mail promotional materials that SoCalGas sent to residential opt-in BTA customers. The emails were only sent to My Account customers. These materials are presented in chronological order from October 2013 through March 2014. Opt-in BTA customers stopped receiving these materials if/when they enrolled in BTA. For SMB customers, there were slightly different versions of this messaging, but to be concise, only the residential versions are included. The communications related to Amazon gift card fulfillment are also provided at the end of this section.

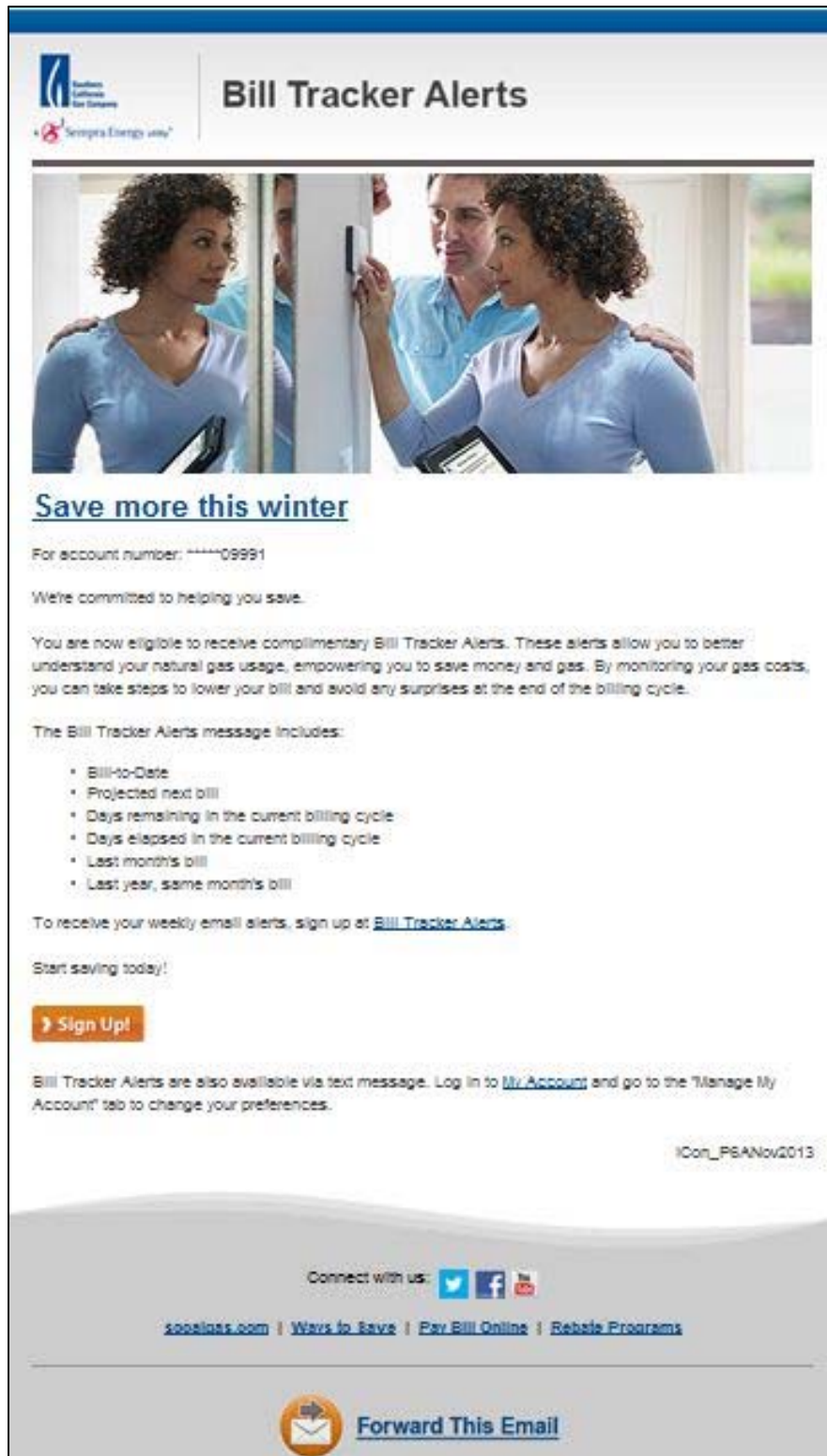
C.1 October 2013


**Figure C-1: October Email for Opt-in BTA Promotion (Sent on October 9)
(Subject Line: “Bill Tracker Alerts Helping You Manage Gas Usage”)**




C.2 November 2013

Figure C-3: November Email for Opt-in BTA Promotion (Sent on November 21)
(Subject Line: "Save More This Winter")



 **Bill Tracker Alerts**



Save more this winter

For account number: ****09991

We're committed to helping you save.

You are now eligible to receive complimentary Bill Tracker Alerts. These alerts allow you to better understand your natural gas usage, empowering you to save money and gas. By monitoring your gas costs, you can take steps to lower your bill and avoid any surprises at the end of the billing cycle.

The Bill Tracker Alerts message includes:

- Bill-to-Date
- Projected next bill
- Days remaining in the current billing cycle
- Days elapsed in the current billing cycle
- Last month's bill
- Last year, same month's bill




To receive your weekly email alerts, sign up at [Bill Tracker Alerts](#).

Start saving today!

[➔ Sign Up!](#)

Bill Tracker Alerts are also available via text message. Log in to [My Account](#) and go to the "Manage My Account" tab to change your preferences.

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Connect with us:   

[socalgas.com](#) | [Ways to Save](#) | [Pay Bill Online](#) | [Rebate Programs](#)




 [Forward This Email](#)

Figure C-5: November “Ways to Save” Insert (Included in November 22-27 Mailing)



**SAVE ENERGY
THIS WINTER**



3 easy “Ways to Save” this winter:

- ### 1 WASH IN COLD WATER

 - Save approximately 80-90 percent on energy used to wash clothes by using only cold water. This could be your easiest and most effective way to save energy.
 - Consider using a clothes washing detergent that is specially formulated to clean in cold water.
 - Need a little extra cleaning power? Stop the cycle after the tub fills with water. Let the load pre-soak for a while and give it some extra cleaning time.

- ### 2 ADD EXTRA LAYERS

 - Bundle up and stay warm this winter. Save up to 30 percent on heating by lowering your furnace thermostat by 3 to 5 degrees (health permitting).
 - Install a programmable thermostat to help automatically regulate your home’s temperature for comfort control and energy savings.

- ### 3 WINTERIZE YOUR HOME

 - Do something about the draft! It’s a sign of significant air leakage that can usually be sealed quite easily. Visually inspect your home for gaps every year to find those smaller problems before they become bigger ones.
 - Caulking works best for gaps that are 1/2 inch or smaller. For larger gaps, you can use a foam sealant that comes in a spray can.

(Continued on back)

USE OUR NEW ONLINE TOOLS TO SAVE EVEN MORE!

Visit **My Account “Ways to Save,”** your online savings tool.

- Set savings goals and get tips on how to achieve them.
- Create a personalized energy profile.
- View your daily and hourly gas usage.
- Analyze your monthly bill history to understand how different factors affect natural gas usage.



New “Ways to Save” Tools

Please visit socialgas.com.



A 

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Figure C-7: December “Winter Savings Checklist” – Front
(Included in December 18-20 Mailing)

SoCalGas Customer Service
1-800-427-2200
socalgas.com






A  Semptra Energy utility*

WINTER SAVINGS CHECKLIST

Start saving on your gas bill today!

Here are some simple, no-cost and low-cost steps you can take to lower your natural gas usage and reduce your bill without sacrificing your comfort:

- Take the guesswork out of your monthly bill by signing up for weekly Bill Tracker Alerts at billtracker.socalgas.com. You will need your Southern California Gas Company (SoCalGas®) account number.
- Set your thermostat to 68°F when you're home and lower it to 58°F when you're away. Consider adding an extra blanket to the bed to keep comfortable while sleeping at the lower temperature.
- Check your heating and cooling system filters every month. Clean filters can significantly improve the energy efficiency of your system.
- Keep heating vents clear. Vents blocked by rugs and furniture prevent heated air from circulating efficiently.
- Set your water heater's temperature to 120°F. You'll want to check the owner's manual for safety instructions before changing any settings.

SoCalGas Bill Tracker Update. Bill-to-Date: \$25. Projected Next Bill: \$40. Last Year Same Month Bill: \$60. Days left in bill cycle: 17. socalgas.com

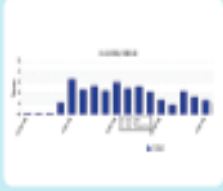
Text Alert Sample




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Figure C-8: December “Winter Savings Checklist” – Back
(Included in December 18-20 Mailing)


My Account Ways to Save tools available on socalgas.com



Now you can monitor and manage your business' natural gas consumption by the day or hour, which will help you see how much energy you are using and when you're using it. Plus, you'll be able to access this information online 24/7.

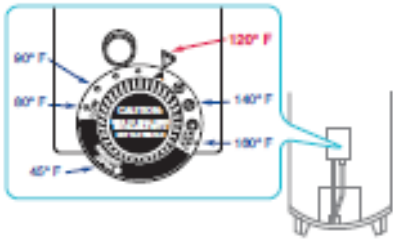


See what equipment in your business makes up the majority of your natural gas usage. Complete the “Energy Profile” and receive even more detailed information about your usage.



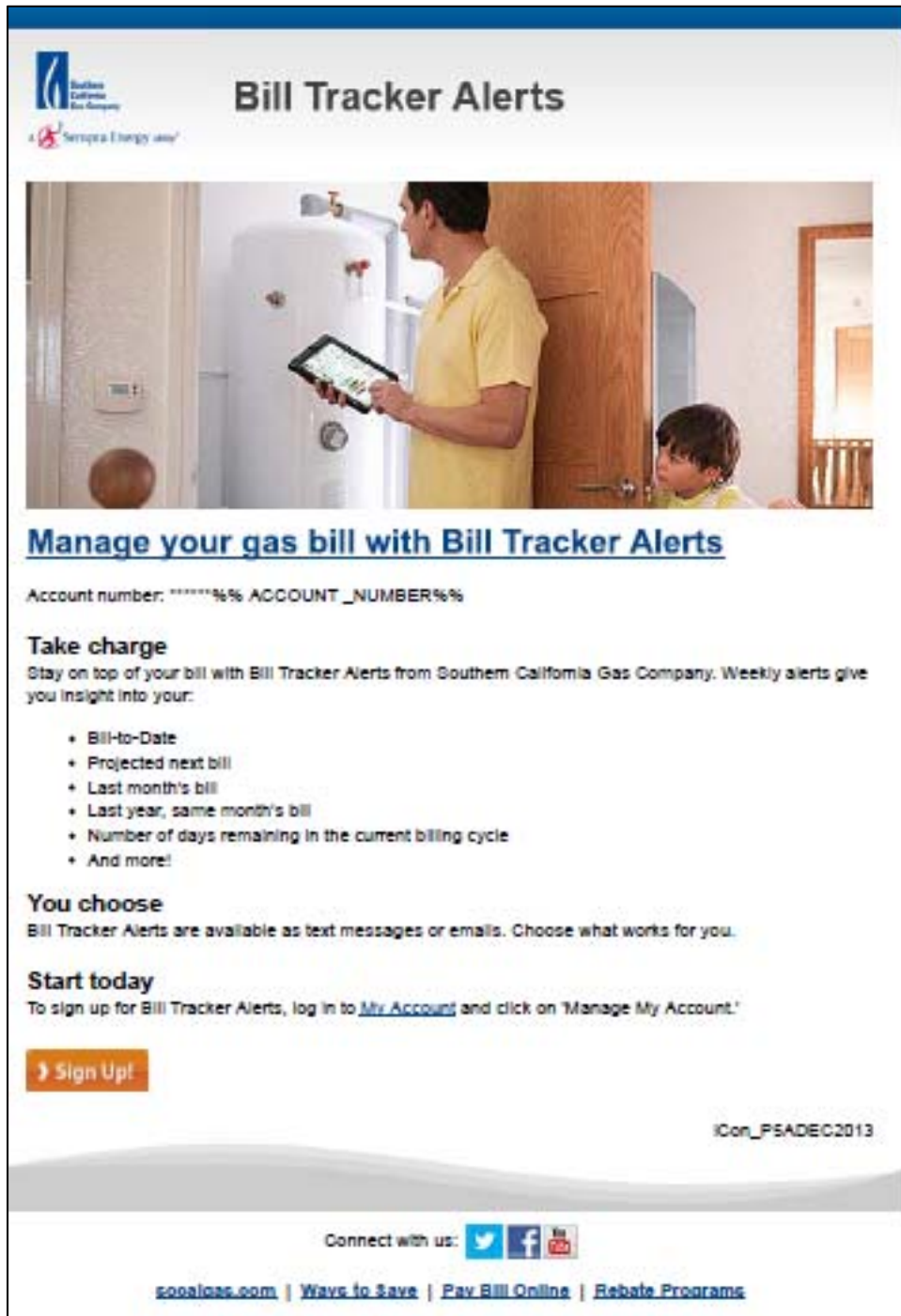
See how your business' usage compares to other businesses in your industry of similar size and location and the most energy-efficient businesses in your area.


- Test, clean and adjust your equipment by a qualified, licensed technician.
- Perform routine maintenance recommended by the manufacturer, according to the owner's manual. This includes replacing dirty air filters and cleaning intake screens, condenser coils, supply registers and return grills.
- Keep heating vents clear. Vents blocked by rugs and furniture prevent heated air from circulating efficiently.
- Identify and repair leaky or disconnected ducts.
- Caulk cracks around windows, doors and other openings.
- Adjust programmable thermostats to turn heating on 30 minutes before employees/ customers arrive and off 30 to 60 minutes before they leave. Set thermostats no higher than 68°F during occupied periods in winter.
- Close curtains, shades and blinds at night and during unoccupied periods to help your building retain heat. Keep them open on sunny days.
- Set your water heater's temperature to 120°F. You'll want to check the owner's manual for safety instructions before changing any settings.




- Wrap water heater and pipes. Unless you have a newer water heater that already has built-in insulation, covering your water heater tank with an insulated “jacket” (\$17-\$20) will keep costs down, especially if your water heater is in an unheated space, like a warehouse or shop.

Figure C-9: December Email for Opt-in BTA Promotion (Sent on December 19)
(Subject Line: "New Alerts to Help You Save")



 **Bill Tracker Alerts**

Manage your gas bill with Bill Tracker Alerts

Account number: *****% ACCOUNT_NUMBER%

Take charge
Stay on top of your bill with Bill Tracker Alerts from Southern California Gas Company. Weekly alerts give you insight into your:

- Bill-to-Date
- Projected next bill
- Last month's bill
- Last year, same month's bill
- Number of days remaining in the current billing cycle
- And more!

You choose
Bill Tracker Alerts are available as text messages or emails. Choose what works for you.

Start today
To sign up for Bill Tracker Alerts, log in to [My Account](#) and click on 'Manage My Account.'



[Sign Up!](#)

ICor_P5ADEC2013

Connect with us:   

[soocalgas.com](#) | [Ways to Save](#) | [Pay Bill Online](#) | [Rebate Programs](#)


Figure C-11: January Email for Opt-in BTA Promotion (Sent on January 22)
(Subject Line: "Get a \$10 gift card by signing up for Bill Tracker Alerts!")

 **Bill Tracker Alerts**


Sign up today – get a \$10 gift card!

For account number: *****01234

For a limited time, Southern California Gas Company (SoCalGas®) is offering a \$10 Amazon.com Gift Card* to customers signing up for Bill Tracker Alerts.



Sign up today for Bill Tracker Alerts and get a \$10 Amazon.com gift card!

Bill Tracker Alerts are personalized weekly alerts that:

- Provide estimated bill costs
- Monitor your gas usage costs
- Eliminate any monthly bill surprises
- Help you save money

Sign up today by logging in to My Account, click on "Manage My Account" and go to the Bill Tracker Alerts section.

Then watch your email for your \$10 Gift Card!
It's that easy.




Hurry! This offer ends February 28, 2014.

[Sign Up!](#)

*Amazon.com is not a sponsor of this promotion. Except as required by law, Amazon.com Gift Cards ("GCs") cannot be transferred for value or redeemed for cash. GCs may be used only for purchases of eligible goods on Amazon.com or certain of its affiliated websites. For complete terms and conditions, see www.amazon.com/gc-legal. GCs are issued by ACI Gift Cards, Inc., a Washington corporation. All Amazon®, TM & © are IP of Amazon.com, Inc. or its affiliates. No expiration date or service fees.

The logos and other identifying marks are trademarks of and owned by each represented company and/or its affiliates. Only the SoCalGas customer whose name and address appear on the enrollment reply card is eligible for this offer; name and address information cannot be altered on the enrollment reply card. Eligible customers must enroll in Bill Tracker Alerts between January 6, 2014 and February 28, 2014, and stay enrolled through March 11, 2014, to qualify to receive a GC. Only one GC per active SoCalGas account. Customers enrolled in Bill Tracker Alerts prior to January 6, 2014, and/or customers with inactive or closed accounts as of February 28, 2014, are not eligible for the GC offer. GC's will be sent via email, text or mail to qualifying customers 4-6 weeks after February 28, 2014.

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Connect with us:   

soocalgas.com | [Bill Assistance](#) | [Pay Bill Online](#) | [Rebate Programs](#)

C.5 February 2014

Figure C-12: February Email for Opt-in BTA Promotion (Sent on February 12)
(Subject Line: "Receive \$10 Gift Card for signing up for Bill Tracker Alert")



Bill Tracker Alerts



Receive a \$10 gift card for signing up!

For account number: <account_number>

For a limited time, Southern California Gas Company (SoCalGas[®]) is offering a \$10 Amazon.com Gift Card* to customers signing up for our new Bill Tracker Alerts.

Bill Tracker Alerts help you:

- Monitor your gas usage costs
- Save money
- Eliminate any monthly bill surprises

Sign up by February 28, 2014 to qualify for this great offer!
Then watch your email for your \$10 gift card.
It's that easy.

Log in to [My Account](#), click on **"Manage My Account"** and go to the **"Manage Alerts"** section.



[Log In](#)

* Amazon.com is not a sponsor of this promotion. Except as required by law, Amazon.com Gift Cards ("GCs") cannot be transferred for value or redeemed for cash. GCs may be used only for purchases of eligible goods on Amazon.com or certain of its affiliated websites. For complete terms and conditions, see www.amazon.com/gc-legal. GCs are issued by ACI Gift Cards, Inc., a Washington corporation. All Amazon®, TM & © are IP of Amazon.com, Inc. or its affiliates. No expiration date or service fees.

The logos and other identifying marks are trademarks of and owned by each represented company and/or its affiliates. Only the SoCalGas customer whose name and address appear on the enrollment reply card is eligible for this offer; name and address information cannot be altered on the enrollment reply card. Eligible customers must enroll in Bill Tracker Alerts between January 13, 2014 and February 28, 2014, and stay enrolled through March 11, 2014, to qualify to receive a \$10.00 GC. Only one GC per active SoCalGas account. Customers enrolled in Bill Tracker Alerts prior to January 13, 2014, and/or customers with inactive or closed accounts as of February 28, 2014, are not eligible for the GC offer. GC will be sent via email, text or mail to qualifying customers 4-6 weeks after February 28, 2014.

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C.6 March 2014

Figure C-13: March Email for Opt-in BTA Promotion (Sent on March 12)
(Subject Line: "Bill Tracker Alert – Helping you save")

Bill Tracker Alerts

Helping you save more

For account number: ****#account_number#N

We're committed to helping you save.

You are now eligible to receive complimentary Bill Tracker Alerts. These alerts allow you to better understand your natural gas usage, empowering you to save money and gas. By monitoring your gas costs, you can take steps to lower your bill and avoid any surprises at the end of the billing cycle.

The Bill Tracker Alerts message includes:

- Bill-to-Date
- Projected next bill
- Days remaining in the current billing cycle
- Days elapsed in the current billing cycle
- Last month's bill
- Last year, same month's bill

To receive your weekly email alerts, sign up at [Bill Tracker Alerts](#).
(Start saving today!)

[Sign Up!](#)

iConPSA_Mar2014



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C.7 Amazon Gift Card Fulfillment

Figure C-14: Amazon Gift Card Fulfillment Email (Sent by Amazon) for Email Alert Customers (Subject Line: "SoCalGas® sent you a gift card")


Your Amazon.com Gift Card has arrived.


Claim Code:
XXXX-XXXXXX-XXXX

Gift Card Amount:

\$10.00



As a special thank you for signing up to receive Southern California Gas Company (SoCalGas®) Bill Tracker Alerts, please accept this \$10 Amazon.com Gift Card with our compliments. Do not delete this message – you'll need the gift card claim code below. You may want to print a copy of this message for easy reference later.

[Apply to Account](#) [How to Use](#)

To redeem your gift card, follow these steps:

1. Visit www.amazon.com/gc
2. Click Apply to Account and enter the Claim Code when prompted.
3. Gift card funds will be applied automatically to eligible orders during the checkout process.
4. You must pay for any remaining balance on your order with another payment method.

Your gift card claim code may also be entered when prompted during checkout. To redeem your gift card using the Amazon.com 1-Click® service, first add the gift card funds to Your Account.

If you have questions about redeeming your gift card, please visit www.amazon.com/gc-redeem.
If you have questions regarding Bill Tracker Alerts, please visit www.socalgas.com.

*Amazon.com is not a sponsor of this promotion. Except as required by law, Amazon.com Gift Cards ("GCs") cannot be transferred for value or redeemed for cash. GCs may be used only for purchases of eligible goods on Amazon.com or certain of its affiliated websites. GCs cannot be redeemed for purchases of gift cards. Purchases are deducted from the GC balance. To redeem or view a GC balance, visit "Your Account" on Amazon.com. Amazon is not responsible if a GC is lost, stolen, destroyed or used without permission. For complete terms and conditions, see www.amazon.com/gc-legal. GCs are issued by ACI Gift Cards, Inc., a Washington corporation. All Amazon ®, ™ & © are IP of Amazon.com, Inc. or its affiliates. No expiration date or service fees.

Figure C-15: Amazon Gift Card Fulfillment Letter for Text Message Alert Customers

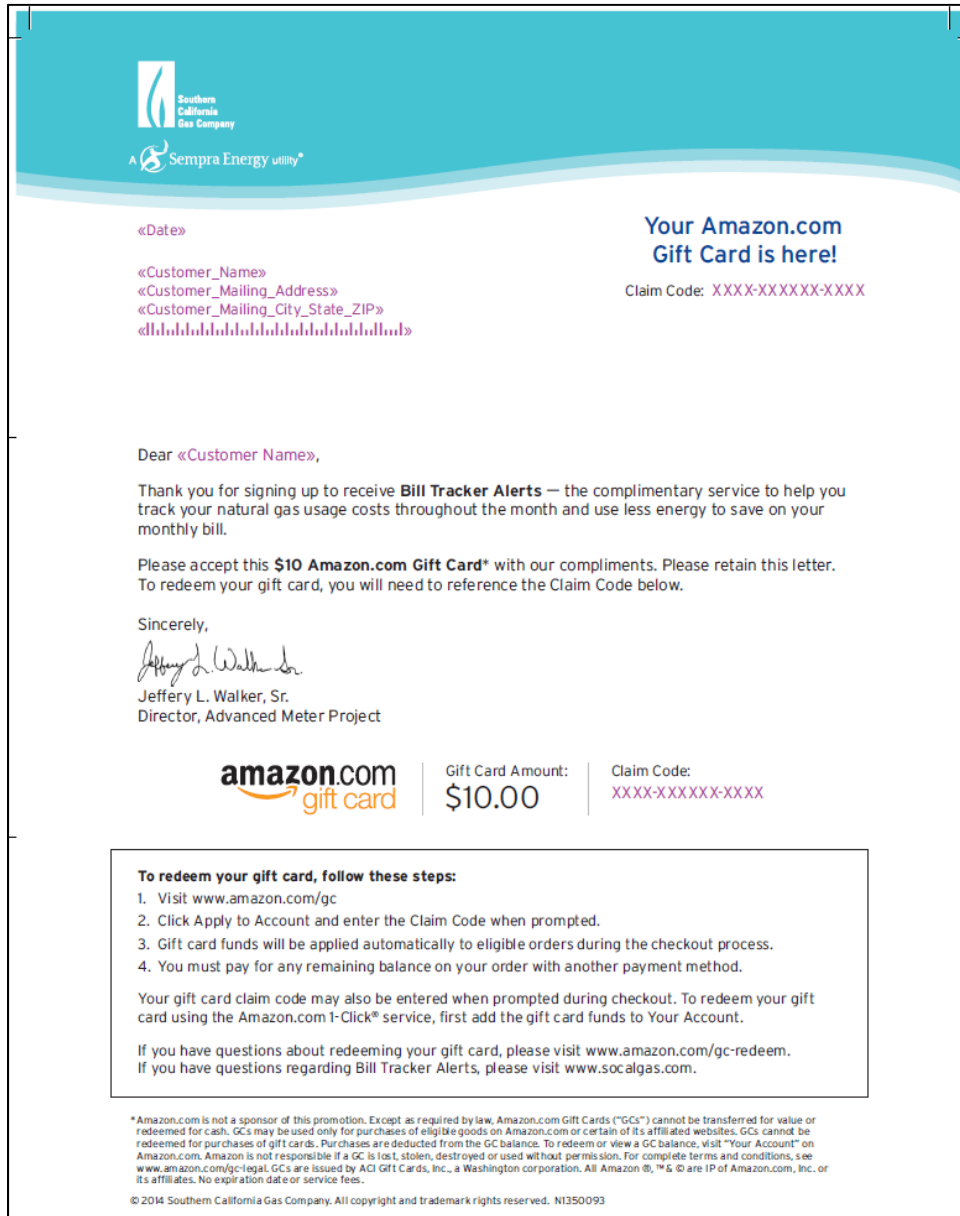




Figure C-16: Amazon Gift Card Fulfillment Letter for Text Message Alert Customers (If Incorrect or Incomplete Mobile Phone Number was Provided)

«Date»

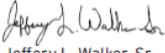
«Customer_Name»
«Customer_Mailing_Address»
«Customer_Mailing_City_State_ZIP»
«XXXXXXXXXXXXXXXXXXXX»

Dear «Customer Name»,

Thank you for signing up to receive **Bill Tracker Alerts** — the complimentary service to help you track your natural gas usage costs throughout the month and use less energy to save on your monthly bill.

Our records indicate you may not be receiving your Bill Tracker Alerts. It appears we have an incorrect or incomplete «mobile phone number (555-555-5555)». Please provide the correct information by calling us at **1-800-427-2200** or, if you have My Account, simply update your alert preferences at **socalgas.com**, click on "Manage My Account" and then go to the "Manage Alerts" section.


Please accept this **\$10 Amazon.com Gift Card*** with our compliments for enrolling in Bill Tracker Alerts. Please retain this letter. To redeem your gift card, you will need to reference the Claim Code below.

Sincerely,

Jeffery L. Walker, Sr.
Director, Advanced Meter Project

Your Amazon.com Gift Card is here!

Claim Code: XXXX-XXXXX-XXXX

Please update your Bill Tracker Alerts contact information at socalgas.com.



Gift Card Amount:

\$10.00

Claim Code:

XXXX-XXXXX-XXXX

To redeem your gift card, follow these steps:

1. Visit www.amazon.com/gc
2. Click Apply to Account and enter the Claim Code when prompted.
3. Gift card funds will be applied automatically to eligible orders during the checkout process.
4. You must pay for any remaining balance on your order with another payment method.

Your gift card claim code may also be entered when prompted during checkout. To redeem your gift card using the Amazon.com 1-Click® service, first add the gift card funds to Your Account.

If you have questions about redeeming your gift card, please visit www.amazon.com/gc-redeem.
If you have questions regarding Bill Tracker Alerts, please visit www.socalgas.com.

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Appendix D Enrollment Microsite (billtracker.socalgas.com)

This appendix provides screenshots of the online BTA enrollment process through the BTA enrollment microsite (billtracker.socalgas.com).

Figure D-1: Bill Tracker Alert Landing Page

Bill Tracker Alerts Enrollment Center

Bill Tracker Alerts

Welcome! Southern California Gas Company (SoCalGas®) Bill Tracker Alerts help you monitor your natural gas usage throughout the month. You can receive weekly Bill Tracker Alerts via email and/or text message.

Step 1 **Step 2**

Provide Information Requested

To get started, please enter the Personal Code you received, or your SoCalGas bill account number and your ZIP Code.

**Required*

Personal Code: [How do I find this?](#)

OR

SoCalGas Account #: [How do I find this?](#)

Mailing Address ZIP Code*:

Next >


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If you're having difficulties enrolling in Bill Tracker Alerts, please email us at advancedmeter@socalgas.com.

Figure D-2: Bill Tracker Alert Notification Settings

Bill Tracker Alerts Enrollment Center

[Log Out]



Bill Tracker Alerts Notification Settings

Welcome, ! Click "Enroll" to finish the process and you will be on your way to saving money.

Step 1 Step 2

SoCalGas Account #: XXX-XXX-1113-3
[Not you? Click here.](#)

Notifications

You can receive weekly Bill Tracker Alerts by using your SoCalGas My Account email address, and/or by providing an additional email address and/or mobile phone number below.

Email Notifications

Send alerts to this email address

Enter email address

Re-enter email address Re-enter email address

And/Or

Text Message Notifications

Enter your mobile phone number below to receive weekly Bill Tracker Alerts text messages.

Send alerts to this mobile number (numeric input only)

Mobile number

Re-enter mobile number Re-enter mobile number

How did you hear about Bill Tracker Alerts?

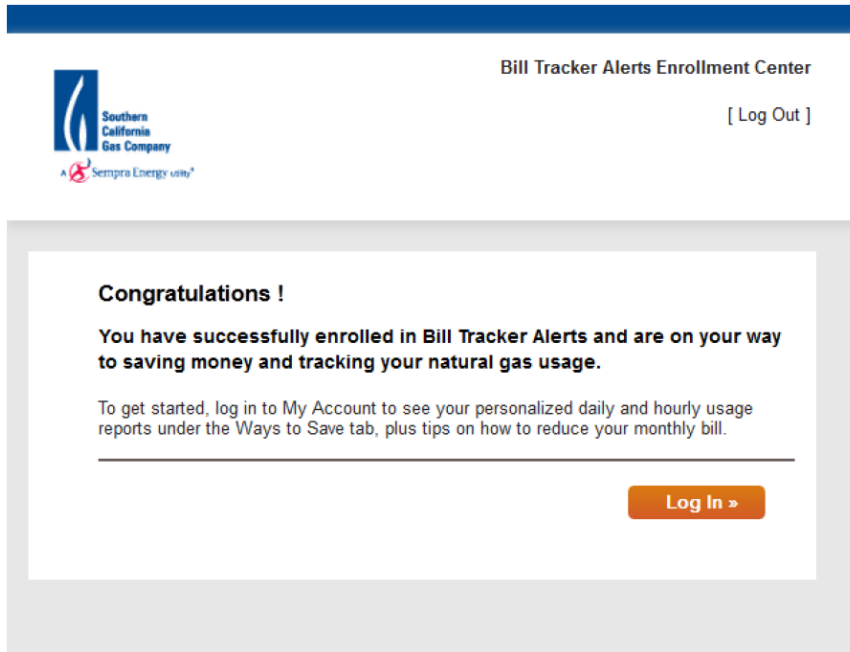
Terms and Conditions

I wish to receive text messages from or on behalf of SoCalGas and its affiliates for the purpose(s) checked above. I acknowledge and agree that I can opt out of future text messages at any time by changing my preferences in this preference center or

By clicking the checkbox, you acknowledge that you have fully reviewed and agree to the [terms of service for text alerts](#) and the [My Account terms and conditions](#). The My Account terms and conditions apply generally to your use of the My Account features (including the Ways to Save tools), and not only to Bill Tracker Alerts.

Enroll >

Figure D-3: Bill Tracker Alert Enrollment Confirmation



The screenshot shows a web page for the "Bill Tracker Alerts Enrollment Center". In the top left corner, there is the Southern California Gas Company logo, which includes a stylized flame icon and the text "Southern California Gas Company" and "A Sempra Energy unit". In the top right corner, the text "Bill Tracker Alerts Enrollment Center" and a "[Log Out]" link are visible. The main content area is a white box with a grey border. It starts with the heading "Congratulations !" followed by the bold text "You have successfully enrolled in Bill Tracker Alerts and are on your way to saving money and tracking your natural gas usage." Below this is a paragraph: "To get started, log in to My Account to see your personalized daily and hourly usage reports under the Ways to Save tab, plus tips on how to reduce your monthly bill." A horizontal line separates this text from an orange "Log In »" button located in the bottom right corner of the white box.

Bill Tracker Alerts Enrollment Center

[Log Out]

Congratulations !

You have successfully enrolled in Bill Tracker Alerts and are on your way to saving money and tracking your natural gas usage.

To get started, log in to My Account to see your personalized daily and hourly usage reports under the Ways to Save tab, plus tips on how to reduce your monthly bill.

[Log In »](#)

Appendix E Sample Size Determination

An important input into development of the evaluation plan was the size of the participant population and control groups required to estimate behavioral effects. The effects to measure are the impacts on energy use for customers who enroll in BTA, are defaulted onto BTA or are defaulted onto HERs. The sample size needed to determine energy impacts is a function of the expected change in energy use attributable to the treatment of interest and the underlying, uncontrolled variation in energy use. In this instance, the variables of interest are monthly and annual energy use. The larger the uncontrolled variation in energy use across customers and/or over time, the larger the sample needed to detect a given change in energy use resulting from program implementation. In addition, the larger the expected impact of the program, the smaller the sample size needed to detect the effect for a given customer population with known variation in energy use. Much of the underlying variation in energy use across customers and over time can be controlled for using regression methods that take into account differences across customers (e.g., fixed effects) and differences across time (e.g., due to weather). That is, for a given population and effect size, the analysis method used to estimate impacts can also influence the required sample size.

Table E-1 shows the sample sizes needed to estimate impacts for SoCalGas' customer population, based on Monte Carlo simulations using actual monthly gas usage data. The sample sizes in the table are sufficient to have an 80% chance of measuring the true hypothesized effect to within $\pm 40\%$ of its magnitude. In other words, if the true effect is 1%, the indicated sample sizes will have an 80% chance of measuring that value to be in the range 0.6% to 1.4%. Alternatively, the same sample sizes have a 90% chance of measuring the effect to within $\pm 53\%$ of its magnitude and a 95% chance of measuring it to within $\pm 63\%$ of its magnitude. As seen, the relationship between effect size and required sample size is not linear. It is much easier and less costly to estimate effects if the expected impact is 5% or 10% than if it is 1% or 2%.

Table E-1: Required Sample Sizes for Selected Effects

Effect Size (%)	Treatment Sample	Treatment + Control
1	12,500	25,000
2	3,000	6,000
3	1,000	2,000
4	600	1,200
5	350	700
6	250	500
7	175	350
8	140	280
9	115	230
10	90	180

The average impact of information programs is likely to be small. On the electricity side, nearly all studies have found impacts to be significantly less than 10% and most estimates have been less than 5%.

With the RCT design that was used for default BTA and HERs, the required sample sizes in Table E-1 can be directly applied to the number of customers that will be defaulted into each of those programs. With a RED design that will be used for opt-in BTA, the application of Table E-1 is not as straightforward because the sample sizes must be adjusted for the expected enrollment rates. For opt-in BTA, not all customers in the treatment group actually experience the treatment, which can significantly dilute the effect size that must be estimated and significantly increase the required sample size needed to detect it. For example, if the population of customers enrolling in bill alerts was expected to be 90%, and the average impact was expected to be 10%, then the average effect size for the entire population would be 9% and the sample sizes for a RED design would be 115 each for treatment and control groups. On the other hand, if only 10% of customers who are offered BTA ultimately enroll, and those who did reduce usage by 10%, the effect size that would need to be detected using a RED design is 1% and the required sample size is 12,500 each for treatment and control groups. The same sample size would be needed if, say, 20% of customers reduced usage on average by 5%. Obviously, the required sample sizes would be much smaller using an experimental design that does not permit customers to select themselves into or out of treatments such as some form of RCT like a recruit and delay or deny assignment strategy; but these more efficient experimental designs are not possible for opt-in BTA. Fortunately, with the relatively low cost information treatments being considered here, the larger required sample sizes using a RED design are not cost prohibitive. Furthermore, SoCalGas is committed to offering information feedback services to a large portion of the customer population, as long as it proves cost-effective to do so. The larger initial samples sizes are consistent with this broader, long-term goal.

When there is significant uncertainty about what the effect size is likely to be, another way to think about sample sizes is to ask the question, “How large does the effect size need to be to be of interest?” Put another way, if it is less than 5%, or 2% or 1%, is that large enough to matter? In SoCalGas’ AM application, the benefit-cost analysis underlying the business case was based, in part, on an assumed average impact across all customers of 1% from the information that would be made available based on the AM platform. Given this, it was decided that the research samples for the preliminary tests should be large enough to detect an estimated impact of 1% with reasonable confidence for bill alerts. The basic experimental design and sample sizes employed in the study are designed to maximize the likelihood that SoCalGas meets its requirement to conclusively show whether it is achieving the 1% savings it claimed would occur as a result of the installation of AMs. In total, the number of treatment and control customers is larger than the values indicated in Table E-1 because of the desire to estimate impacts for selected customer segments, such as My Account and non-My Account customers and customers within different usage strata.