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# 2019 California Low-Income Needs Assessment

Final Report: Volume 2 of 3: Detailed Methods and Results

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## Glossary

**Alternative-fuels (alt-fuels) customers:** Low-income customers who do not have natural gas service and who use propane, kerosene/oil/diesel, and/or wood/pellets as their primary fuel(s) for space heating, water heating, and/or cooking.

**Areas with high concentrations of CARE-eligible customers:** Census tracts in California where 20% or more households earn 100% or less of federal poverty guidelines (FGP).

**California Alternate Rates for Energy (CARE) program:** A rate assistance program offered by the IOUs that provides income qualified customers who earn 200% or less of federal poverty guidelines (FPG) a discount of up to 35% on their monthly electricity bills and up to 20% on their monthly natural gas bills.

**CARE capitation agencies:** Community-based organizations that provide services to local residents, including assistance with CARE enrollment, recertification, income verification, and/or high-usage processes.

**CARE categorical participation:** Participants who enrolled in or recertified for CARE by selecting in their CARE application the public assistance programs they participate in or that they are on fixed income instead of providing an annual income amount.

**CARE-eligible nonparticipants:** Low-income customers earning 200% or less of federal poverty guidelines (FPG) and who have never participated in CARE as of July 2018.

**CARE enrollment:** Process through which low-income customers enroll in the CARE program by providing their household size and annual income or selecting public assistance programs they participate in or that they are on fixed income in the CARE application and submitting the application to their IOU.

**CARE enrollment channel:** Means through which customers can enroll in (and recertify for) CARE and include CARE capitation agencies, IOU website, IOU customer call center, direct mail, data sharing between IOUs, and others.

**CARE high-usage verification:** Process through which CARE high-users either reduce their usage to below 400% of their baseline allowance, through ESA participation and usage monitoring, or appeal their high-usage to their IOU; participants who do not reduce their usage or whose appeal is declined are removed from CARE for up to two years.

**CARE high-users:** CARE participants who monthly usage exceeds 400% (high-low user) or 600% (high-high user) of their baseline allowance and are selected for high-usage verification.

**CARE income verification:** Process through which CARE participants who are likely not income-eligible are identified via the IOU's monthly propensity modeling and are selected to verify their income (e.g., with tax forms, check stubs, etc.) or public assistance participation (e.g., with award letters, receipts, etc.) with their IOU; participants who do not provide the proper documentation or are no longer eligible are removed from CARE for up to two years.

**CARE recertification:** Process through which all CARE participants must recertify, or renew, their participation in CARE by completing and submitting the CARE application to their IOU; occurs every two years for most participants and those who do not provide their information or are no longer eligible are removed from CARE.

**Current CARE participant:** Low-income customers currently participating in CARE as of July 2018.

**Energy Burden Metrics:** Energy burden is the percentage of customers' annual income that is spent on their energy bills; modified energy burden includes the monetary value of public assistance programs in the income of customers participating in such programs; alternative energy burden includes the annual cost of alt-fuels in the annual energy costs of customers who use alt-fuels.

**Energy Savings Assistance (ESA) program:** An energy assistance program offered by the IOUs that provides income-qualified customers who earn 200% or less of federal poverty guidelines a free home energy assessment, energy saving equipment repair, replacements, or upgrades, and an energy education.

**ESA supervisors/lead contractors:** Contractors working for firms qualified by IOUs to provide ESA services and who manage or lead teams that do ESA enrollments and assessments and/or installation of ESA heating, cooling, or enclosure measures.

**ESA participants:** Low-income customers who participated in ESA between January 1, 2016 and June 30, 2018 (recent participants), received ESA energy education, and received at least one of the targeted ESA measures.

**Family Electric Rate Assistance (FERA) program:** A rate assistance program offered by the IOUs that provides income qualified customers who earn 250% or less of federal poverty guidelines (FPG) and who have three or more household members a discount of up to 12% on their monthly electricity bills.

**High service reliability customers:** Customers living in areas with high electricity service reliability, measured as less than one standard deviation above the SAIDI or SAIFI mean values for each IOU.

**Investor-owned utilities (IOUs):** The four utilities that are subject to the 2017-19 Low-Income Needs Assessment (LINA) and who provide energy services to most California residents; they include Pacific Gas & Electric (PG&E), Southern California Edison (SCE), Southern California Gas (SCG), and San Diego Gas & Electric (SDG&E).

**Low service reliability customers:** Customers living in areas with low electricity service reliability, measured as one standard deviation or more above the SAIDI or SAIFI mean values for each IOU.

**Past CARE participants:** Low-income customers who formerly participated in CARE any time between January 1, 2015 and June 30, 2018 but were removed from CARE as of July 2018.

**System Average Interruption Duration Index (SAIDI):** Measure of an IOU's annual average duration of electricity outages, where larger numbers mean longer outages.

**System Average Interruption Frequency Index (SAIFI):** Measure of an IOU's annual average frequency of electricity outages, where larger numbers mean more frequent outages.

**Targeted ESA measures:** The heating, cooling, and enclosure measures that are the focus of the 2017-19 LINA and identified as higher-cost and/or labor intensive: furnace repair or replacement; central air conditioning (AC) tune-up, repair, or replacement; room/window AC replacement; evaporative cooler replacement; attic insulation; weatherization; and, windows and doors.

## Appendix A. Introduction

Volume 2 of the 2019 LINA report includes six appendices with detailed descriptions of the study methods and results that are summarized in Volume 1:

- Appendix B explains the study data collection and analysis methods that are summarized in Chapter 2 in Volume 1 of the report.
- Appendix C includes detailed results for RO.1a Informing CARE PE Processes that are summarized in Chapter 3 in Volume 1 of the report.
- Appendix D includes detailed results for RO.1b Informing CARE Marketing, Outreach, and Education (ME&O) that are summarized in Chapter 4 in Volume 1 of the report.
- Appendix E includes detailed results for RO.2 Examining ESA Program Health, Comfort, and Safety (HCS) Impacts that are summarized in Chapter 5 in Volume 1 of the report.
- Appendix F includes detailed results for RO.3 Assessing Alt-Fuels Customer Hardships that are summarized in Chapter 6 in Volume 1 of the report.
- Appendix G includes detailed results for RO.4 Assessing Low Service Reliability Customer Hardships that are summarized in Chapter 7 in Volume 1 of the report.

Volume 3 of the 2019 LINA report includes supporting documentation for the study, including the research plan, the customer survey instrument and messaging, and the ESA and CARE capitation agency interview guides.