

**BEFORE THE PUBLIC UTILITIES COMMISSION
OF THE STATE OF CALIFORNIA**

Application of Southern California Edison Company (U 338-E) for Approval of its 2012-2014 California Alternate Rates for Energy and Energy Savings Assistance Programs and Budgets	Application 11-05-017 (Filed May 16, 2011)
Application of Southern California Gas Company (U904 G) for Approval of Low Income Assistance Programs and Budgets for Program Years 2012-2014	Application 11-05-017 (Filed May 16, 2011)
Application of Pacific Gas and Electric Company for Approval of the 2012-2014 Energy Savings Assistance and California Alternate Rates for Energy Programs and Budgets (U 39M)	Application 11-05-017 (Filed May 16, 2011)
Application of San Diego Gas & Electric Company (U 902M) for Approval of Low-Income Assistance Programs and Budgets for Program Years 2012-2014.	Application 11-05-017 (Filed May 16, 2011)

**ANNUAL REPORT ACTIVITY OF SAN DIEGO GAS & ELECTRIC COMPANY
(U 902 M) ON LOW INCOME ASSISTANCE PROGRAMS FOR 2012**

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**ANNUAL REPORT ACTIVITY OF SAN DIEGO GAS & ELECTRIC COMPANY
(U 902 M) ON LOW INCOME ASSISTANCE PROGRAMS FOR 2012**

This report presents the results and expenditures for San Diego Gas & Electric Company's (SDG&E) California Alternate Rates for Energy and Energy Savings Assistance Program for program year 2012. SDG&E notes, because D.12-08-044 was issued towards the latter part of 2012, certain elements of this annual report remain consistent with the format established for the 2009 – 2011 program cycle. Such matters were determined in consultation with the Commission's Energy Division and the other large energy Investor Owned Utilities as part of the charges of the mid-cycle working group established by the D.12-08-044. The purpose

of this report is to provide the California Public Utilities Commission's Energy Division with all necessary information to assist in analyzing the low income programs.

Respectfully submitted:

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May 1, 2013

**Energy Savings Assistance Program (ESA)
AND
California Alternate Rate for Energy (CARE)
Program Annual Report**

LOW INCOME ENERGY EFFICIENCY PROGRAM ANNUAL REPORT

TABLE OF CONTENTS

Title	Page
1. ENERGY SAVINGS ASSISTANCE PROGRAM EXECUTIVE SUMMARY	1
1.1. Alignment of Energy Savings Assistance Program with Strategic Plan Goals and Strategy	2
1.2. Energy Savings Assistance Program Overview.....	8
1.3. Whole Neighborhood Approach Evaluation.....	9
1.4. Energy Savings Assistance Program Customer Enrollment Evaluation.....	10
1.5. Disability Enrollment Efforts.....	11
1.6. Leveraging Success Evaluation, Including LIHEAP	15
1.7. Integration Success Evaluation	17
1.8. Workforce Education & Training	21
1.9. Legislative Lighting Requirements Status	22
1.10. Studies.....	24
1.11. Pilots	25
2. CARE EXECUTIVE SUMMARY	27
2.1. Participant Information	29
2.2. CARE Program Summary.....	33
2.3. CARE Program Costs	34
2.4. Outreach.....	38
2.5. Processing CARE Applications	49
2.6. Program Management.....	50
3. CARE EXPANSION PROGRAM	53
3.1. Participant Information	53
3.2. Usage Information	54
3.3. Program Costs.....	54
3.4. Outreach.....	55
3.5. Program Management.....	57
4. FUND SHIFTING.....	57
5. COMMONLY USED ACRONYMS	59
6. APPENDIX: ENERGY SAVINGS ASSISTANCE PROGRAM TABLES and CARE TABLES	60

ENERGY SAVINGS ASSISTANCE PROGRAM ANNUAL REPORT

1. ENERGY SAVINGS ASSISTANCE PROGRAM EXECUTIVE SUMMARY

San Diego Gas & Electric Company's (SDG&E)'s Energy Savings Assistance (ESA) Program¹ offers its low income natural gas and electric customers weatherization services, energy efficient lighting, energy efficient appliances, energy education, and other services at no cost. In recognition of the changes in the energy markets and the environment, as well as the needs of low income customers and the larger community, the California Public Utilities Commission (Commission) in Decision (D. or Decision) 07-12-051 updated its policy objectives for the ESA Program stating:

[T]he key policy objective for the LIEE programs, like that of our non-LIEE energy efficiency programs, is to provide cost-effective energy savings that will serve as an energy resource and to promote environmental benefits. We retain our commitment to ensuring the LIEE programs add to the participant's quality of life, which implicates equity, energy affordability, bill savings, and safety and comfort for those customers who participate in the LIEE programs.²

To achieve these objectives, the Commission adopted an ESA Program programmatic initiative "to provide all eligible LIEE customers the opportunity to participate in LIEE programs and to offer those who wish to participate all cost effective energy efficiency measures in their residences by 2020."³

¹ The Energy Savings Assistance Program was formerly known as the Low Income Energy Efficiency Program or "LIEE".

² D. 07-12-051 at p. 2.

³ *Id.*

The long-term California Energy Efficiency Strategic Plan (Strategic Plan) lays out two goals in achieving the vision: 1) By 2020, all eligible customers will be given the opportunity to participate in the ESA Program; and, 2) The ESA Program will be an energy resource by delivering increasingly cost effective and longer-term savings.

In D. 12-08-044, the Commission approved SDG&E's ESA Program design and budget for Program Years (PY) 2012-2014. SDG&E will continue to support the Commission's key policy objective of making the ESA Program a reliable energy resource and to achieve the adopted goal of reaching 25% of SDG&E's willing and eligible households during the 2012-2014 program cycle.

This report provides information on SDG&E's ESA Program accomplishments and expenditures for PY 2012. In 2012, the ESA Program exceeded its goal for the number of homes treated by serving 22,415 customers, which is 111% of the 2012 goal. The program spent \$21.046 million representing 97% of its authorized 2012 budget. At year end, there was a total of \$8,580,108 in unspent gas and electric ESA Program funds which SDG&E plans to carry over and use during the remainder of the 2012-2014 program cycle.

1.1. Alignment of Energy Savings Assistance Program with Strategic Plan Goals and Strategy

The long-term California Strategic Plan vision for the Energy Savings Assistance (ESA) Program is to have 100% of all eligible and willing low income customers receive all cost effective ESA Program measures by 2020. The Plan lays out two goals in achieving the ESA Program vision: 1) By 2020, all eligible customers will be given the opportunity to participate in the ESA Program, and 2) The ESA Programs will be an energy resource by delivering increasingly cost-effective and longer-term savings.

**1.1.1. Please identify the IOU strategies employed in meeting Goal 1:
Improve Customer Outreach**

Implementation Plan and Timeline		
Strategies	Term 2012 - 2014	IOU strategy employed this program year
1: Strengthen program outreach using segmentation analysis and social marketing tools.	<ul style="list-style-type: none"> Identify, implement and evaluate effective marketing, education and outreach methods for targeting low income customer segments. Use social marketing to effectively engage low income customers in program participation. 	<ul style="list-style-type: none"> SDG&E continued to utilize customer segmentation data provided through Nielson utilizing PRIZM codes⁴. The utilization of PRIZM codes allows for unique targeted messages, across selected channels designed for unique customer segments. SDG&E also explored using zip code information including the use of zip plus two which provides demographic information at the block level, providing more specific information to base eligibility. To keep pace with the ever changing world of social media, SDG&E ensured that Twitter and Facebook posts about the program occurred on a monthly basis. Based on results found in the SDG&E's Residential Customer Segmentation study conducted in 2011, younger customers are more likely to find information regarding the ESA Program online or through social networking. SDG&E recognizes social media as new way of

⁴ PRIZM codes are an area set of customer segmentation data widely used for marketing purposes in the United States. The data consist of demographic clusters that categorize every U.S. household into a segment. These segments were developed in part from the analysis of U.S. census data and categorize U.S. consumers into 14 distinct groups and 66 segments. The segments help marketers tailor content to consumers' needs and look at a variety of factors, including income, likes, dislikes, lifestyles and purchase behaviors.

Implementation Plan and Timeline		
Strategies	Term 2012 - 2014	IOU strategy employed this program year
		<p>communicating and continues to find ways to build on its effectiveness.</p> <ul style="list-style-type: none"> SDG&E continued to build a robust presence in the community by continued partnerships with Community Based Organizations (CBOs) who service the very difficult to reach customers.
1.2: Develop a recognizable and trustworthy Brand/Tagline for the programs.	<ul style="list-style-type: none"> Develop a statewide program name and description for Energy Savings Assistance Program which is coordinated with the ME&O efforts for energy efficiency, demand response and any other demand-side options. Implement branding. 	<ul style="list-style-type: none"> The development and implementation of the statewide program name (Energy Savings Assistance Program) was completed in 2009-2011 program cycle. No additional efforts were required in 2012.
1.3: Improve program delivery	<ul style="list-style-type: none"> Use information from segmentation analysis to achieve efficiencies in program delivery. Leverage with Local, State, and Federal agencies as well as other organizations to increase seamless coordination, efficiency and enrollment 	<p>SDG&E continued to utilize both segmentation analysis and targeted outreach tactics to drive awareness and enrollments in the ESA Program. SDG&E worked closely with its outreach and assessment contractors to help them identify specific areas with a high potential of eligible customers to target thereby decreasing windshield time and improving the lead conversion rate.</p> <p>SDG&E continued to work with the two Low Income Home Energy Assistance Program⁵ (LIHEAP)</p>

⁵ LIHEAP is administered by the California Department of Community Services and Development.

Implementation Plan and Timeline		
Strategies	Term 2012 - 2014	IOU strategy employed this program year
		contractors serving San Diego County. These contractors were able to serve customers under both programs with the intent of providing customers with more measures and driving efficiencies in both programs.
1.4: Promote the growth of a trained Energy Savings Assistance Program workforce.	<ul style="list-style-type: none"> • Incorporate Energy Savings Assistance Program training needs into the Workforce Training needs assessment. • Develop Training Roadmap which includes funding requirements and sources other than IOUs. • Implement Energy Savings Assistance Program workforce education and training. 	<p>In 2012, SDG&E continued to work with its Human Resources Department to coordinate activities related to Workforce Readiness. SDG&E also encouraged the ESA Program contractors to hire from the neighborhoods they serve. One of SDG&E's outreach contractors The Harris Group hires local residents to provide multicultural in-language outreach for SDG&E's CARE and ESA Programs.</p> <p>In accordance with direction from the Commission D.12-08-044 Ordering Paragraph (OP) 9, SDG&E worked with the other IOU's to develop a single uniform Workforce, Education & Training (WE&T) reporting template to be completed by the ESA Program contractors in 2013.</p>

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**1.1.2. Please identify the IOU strategies employed in meeting Goal 2:
Energy Savings Assistance Program is an Energy Resource**

Implementation Plan and Timeline		
Strategies	Term 2012 - 2014	IOU strategy employed this program year
2.1: Increase collaboration and leveraging of other low-income programs and services	<ul style="list-style-type: none"> • Identify key areas where data sharing would be possible and advantageous. • Develop partnerships with community organizations and other agencies to leverage resources available from local governments, federal, state, and private project funding sources. 	<p>SDG&E continued to increase the level of data sharing between programs within the utility including providing over-income ESA Program applicants to the Middle Income Direct Install (MIDI) program as well as receiving ESA Program leads from the MIDI program. System integration efforts between the Home Energy Assistance Tracking (HEAT) system and the CARE system began in 2012. This effort will allow for consolidated on-line interest forms where customers can request participation in both the ESA Program and/or CARE Program. Implementation of this on-line form is scheduled for 2013.</p> <p>In 2012, SDG&E continued working with California Department of Community Services and Development (CSD) to address customer confidentiality concerns associated with data sharing. Significant progress was made in the last quarter of 2012 on this issue. SDG&E expects to assist CSD with customer notification of CSD solar program for past participants in the ESA Program.</p>
2.2: Coordinate and communicate between Energy Savings Assistance Program, energy efficiency and DSM programs to achieve service offerings	<ul style="list-style-type: none"> • Ensure Energy Savings Assistance Program participants are aware of energy efficiency and DSM/EE programs. • Coordinate with CSI programs to provide Energy Savings 	<p>SDG&E continued to drive integration across the organization through an educational and cross training approach. In 2012, nine training classes were completed to educate employees on how to be an energy expert. In these training classes, employees from Energy</p>

Implementation Plan and Timeline		
Strategies	Term 2012 - 2014	IOU strategy employed this program year
that are seamless for the customer.	<p>Assistance Program services in qualified low income housing for both single family and multi-family CSI programs.</p> <ul style="list-style-type: none"> • Coordinate AMI delivery and Energy Savings Assistance Programs 	<p>Efficiency programs, Demand Response programs, CARE and the ESA Program were able to learn more about programs and services available to customers from all these areas. In addition, employees were able to walk away with tools that would help them educate and offer customers programs that would be most beneficial and valuable to them. SDG&E continued to work with the California Solar Initiative (CSI) to leverage offerings by the Single-family Affordable Solar Homes (SASH) Program with the ESA Program. The SASH Program is one of CSI's low income programs offering incentives on Photo Voltaic (PV) solar systems to qualifying low income homeowners. In order to offer customers the most energy savings benefit, customers that apply for CSI and are eligible for ESA Program are also referred to ESA Program for enrollment. This coordination has made the process easier for customers while also allowing a more comprehensive energy solution.</p>
2.3: Provide low income customers with measures that result in the most savings in the Energy Savings Assistance Program.	<ul style="list-style-type: none"> • Assess design of programs to ensure increasingly cost effective measures, while reducing low-income customers' bills and improving quality of life. • Continue to include measures that provide long term energy savings, such as refrigerators. 	<p>The ESA Program provided customers with major appliances such as refrigerators and high-efficiency (HE) clothes washers help to drive larger savings for customers. In-Home Education remains a key foundation in providing customers with information regarding targeted conservation behaviors and practices that can translate to more sustained savings.</p> <p>In addition, with the Commission's approval of the change in eligibility criteria for refrigerator replacements from pre-1993 to pre-1999, SDG&E</p>

Implementation Plan and Timeline		
Strategies	Term 2012 - 2014	IOU strategy employed this program year
		expects to find many more customers eligible for replacement of their older refrigerators with new energy efficient models.
2.4: Increase delivery of efficiency programs by identifying segmented concentrations of customers.	<ul style="list-style-type: none"> Identify and develop segmented approach to deliver services to households Improve use of CBOs in delivering services 	<ul style="list-style-type: none"> SDG&E continued to refine the segmentation analysis to drive enrollments across the low income population. Nielson PRIZM codes were added at a more granular level than the zip+4 level to identify households most likely to qualify for ESA Program services. Email campaigns were launched in 2012 using the refined codes with messages specific to the household segments. SDG&E's partnerships with CBOs continue to help drive enrollments in hard-to-reach populations. Cultural, language and ethnic barriers are more readily overcome by CBOs that serve these customers.

1.2. Energy Savings Assistance Program Overview

1.2.1. Provide a summary of the Energy Savings Assistance Program elements as approved in Decision 12-08-044:

Program Summary			
	Authorized / Planning Assumptions	Actual	%
Budget	\$ 21,716,006	\$ 21,046,806	97%
Homes Treated	20,306	22,415	110%
kWh Saved	8,256,818	8,962,474	109%
kW Demand Reduced	1,991	642	32%
Therms Saved	283,727	311,324	110%

1.3. Whole Neighborhood Approach Evaluation

1.3.1 Provide a summary of the geographic segmentation strategy employed, (i.e. tools and analysis used to segment “neighborhoods,” how neighborhoods are segmented and how this information is communicated to the contractor/CBO).

SDG&E continued to utilize PRIZM codes as the foundation for its geographic segmentation strategy used to support its Whole Neighborhood Approach (WNA). SDG&E’s service territory was initially segmented according to zip codes and further segmented by a residential customer profile. This segmentation allowed for targeted messaging to customers with high potential for eligibility, and the utilization of customer’s preferred channels of communication enabled SDG&E to drive customer enrollment. For the WNA, a series of communication tactics such as direct mail, outbound calling, and door-to-door canvassing were deployed to potentially eligible customers within specific neighborhoods. SDG&E coordinated these tactics in a multi-touch integrated approach to increase awareness and recall, and drive enrollment in the ESA Program.

1.3.2 Provide a summary of the customer segmentation strategies employed (i.e. tools and analysis used to identify customers based on energy usage, energy burden and energy insecurity) and how these customer segments are targeted in the Whole Neighborhood Approach to program outreach.

The majority of eligible ESA Program customers are low energy users. Because their gas and electric bills are so low, saving money on their SDG&E bill is not necessarily a top priority for them. Therefore as a way to gain customer interest in the program, SDG&E sent targeted electronic mails (e-mails) to young families highlighting the fact that one benefit of the program is making their homes more comfortable. SDG&E highlighted the energy savings benefits of the ESA Program in its communications including “in-language” messaging in Chinese, Vietnamese, and Filipino such as: “Save money on your

energy bill so you can have more money to spend on your family.” For households with high energy insecurity, who are 60 days or more behind on their bill, SDG&E continued outreach efforts at branch payment offices to work with past due customers who typically pay their bills in person. The SDG&E Energy Service Specialists (ES Specialists) reviewed the customer’s account and refer potentially eligible customers to apply for CARE and the ESA Programs. The ES Specialists are provided with a report that allows them to check the residence for previous program participation. This has resulted in an increase of enrollments from the branch offices. Since it is difficult to segment each of these specific groups by neighborhood, they became a subset of SDG&E’s WNA efforts.

1.3.3. Describe how the current program delivery strategy differs from previous years, specifically relating to Identification, Outreach, Enrollment, Assessment, energy Audit/Measure Installation, and Inspections.

SDG&E made no changes to the ESA Program delivery strategy in 2012.

1.4. Energy Savings Assistance Program Customer Enrollment Evaluation

1.4.1. Distinguish between customers treated as “go backs” and brand new customers so that the Commission has a clear idea of how many new customers the IOUs are adding to the Energy Savings Assistance Program.

Through its HEAT database, SDG&E maintains comprehensive records for customers served by the ESA Program going back to 1996. SDG&E does not actively market to past participants because the goal of the ESA Program is to serve as many new customers as possible during the program cycle. If a customer contacts the ESA Program and the dwelling has not been served by the program since 2002 or, has a qualifying “go back” measure (refrigerator, attic insulation, furnace) SDG&E will re-qualify and serve that customer. This approach results in customers receiving services they are eligible for

while keeping the program focused on new customers who have never received services.

In 2012, 1,033 customers (or 4.6%) were served as “go backs”.

1.4.2. Please summarize new efforts to streamline customer enrollment strategies, including efforts to incorporate categorical eligibility and self-certification.

SDG&E worked with outreach and assessment contractors to coordinate prompt receipt of leads collected from SDG&E’s outreach tactics, to expedite contact with customer.

SDG&E also shared canvassing lists with contractors, to support the Decision’s approval of continuation of categorical enrollment for ESA Program in targeted areas.⁶

1.4.3. If the IOU has failed to meet its annual goal of number of households served, please provide an explanation of why the goal was not met. Explain the programmatic modifications that will be implemented in order to accomplish future annual goals of number of households served.

SDG&E met its annual goal of number of households served during 2012.

1.5. Disability Enrollment Efforts

1.5.1. Provide a summary of efforts to which the IOU is meeting the 15% penetration goal.

The ESA Program disability enrollment penetration for 2012 measured 12%.

1.5.2. Describe how the Energy Savings Assistance Program customer segmentation for ME&O and program delivery takes into account the needs of persons with disabilities.

SDG&E’s Marketing, Education, and Outreach (ME&O) communications are designed to specifically address the communication needs of its customers with disabilities.

For customers with visual impairments, SDG&E provided:

- Large-font printed materials

⁶ D. 12-08-044 at pps. 310-311.

- Audio formatted communication on CD and cassette
- Program information booklets in Braille

For customers with hearing impairments, SDG&E provided:

- Videos in American Sign Language (ASL)
- ASL interpreters in the home when low-income energy efficiency services are being installed
- Closed-captioned videos
- Web link to SDG&E's programs through the Deaf and Disabled Telecommunications Program (DDTP)

1.5.3. Identify the various resources the IOUs utilize to target the disabled community and the enrollments as a result:

SDG&E actively marketed the ESA Program with outreach efforts to 20 different CBOs.

In addition to the CBOs partnered with in previous years, SDG&E provided outreach efforts to the American Cancer Society and The Disabled Services Advisory Council.

The diversity of these groups ensures coverage across the SDG&E service territory.

Information is shared with the hearing impaired communities through an active web link on the Deaf and Disabled Telecommunications Program. Video logs in American Sign Language are posted on the Deaf Community Services of San Diego website, and are also available in DVD format through other organizations serving the needs of the disabled communities such as the San Diego Regional Center and the San Diego Health and Human Services Administration - Aging and Independent Services.

Provided below is a list of organizations serving the disabled communities that promote Energy Savings Assistance program:

- Deaf Community Services of San Diego

- San Diego Center for the Blind
- Aging and Independent Services (San Diego In-Home Support Services Authority)
- San Diego Regional Center
- Access to Independence San Diego
- California Council of the Blind-San Diego Chapter
- National Federation of the Blind North San Diego Chapter
- Red Cross of San Diego
- Disability Rights California-San Diego Regional Office
- Elder Help of San Diego
- Southern Caregiver Resource Center
- American Cancer Society
- Department of Rehabilitation-San Diego District Office
- Toward Maximum Independence, Inc.
- Californians for Disability Rights-San Diego Chapter
- Employment and Community Options
- San Diego Mental Health Services
- Rebuilding Together San Diego
- San Diego Autism Society
- Disabled Services Advisory Council

Disability Enrollments			
Source	Enrollments	Disability Enrollments	% of Disability Enrollments
Bill Insert	365	57	16%
Branch Offices	1,031	127	12%
Calling Campaign	1,697	283	17%
Canvassing	12,310	1,249	10%
CBO	73	12	16%
City/Government Municipality	6	1	17%
Contractor Referral	1,481	195	13%
Customer Referral	2,455	409	17%
Direct Mail	363	51	14%
Email Campaign	1,035	97	9%
Employee Referral	753	149	20%
Energy Savings Assistance Program Capitation	223	38	17%
Energy Savings Center	179	14	8%
Internal SDGE Programs	110	18	16%
Media	118	19	16%
Online Web	602	68	11%
Outreach & Marketing Team	237	24	10%
Outreach Events	25	5	20%
Source Not Identified			
Utility Referral	74	9	12%
Total	23,342	2,863	12%

1.5.4. If participation from the disabled community is below the 15% goal, provide an explanation why:

At 12%, SDG&E is continuing to hone its marketing, outreach and enrollment strategies to target this unique community. SDG&E continues to build its network of partners who actively engage with the disabled community. SDG&E has a Customer Solutions Advisor who is specifically assigned to work with community-based organizations that serve the disabled community as a direct liaison to SDG&E programs and services. SDG&E also provides ESA Program information in large font and Braille versions to customers with visual impairments and provides videos in American Sign Language (ASL) for

customers with a hearing impairment. ASL interpreters are also available to customers at outreach events, and when the ESA Program measures are being installed if requested by the customer. Customers are made aware of this service through Deaf Community Services.

SDG&E also works directly with organizations serving the disabled community to ensure all eligible customers are provided program information and an opportunity to participate in the program if eligible. Organizations include but are not limited to the Deaf Community Services, Braille Institute, Center for the Blind, and Aging and Independent Services (see section 1.5.3 for comprehensive list of organizations).

1.6. Leveraging Success Evaluation, Including LIHEAP

Decision 08-11-031 defines leveraging as “an IOU’s effort to coordinate its LIEE programs with programs outside the IOU that serve low income customers, including programs offered by the public, private, non-profit or for-profit, local, state, and federal government sectors that result in energy efficiency measure installations in low income households”. Progress will be measured by tracking the following criteria:

- ***Dollars saved.*** Leveraging efforts are measurable and quantifiable in terms of dollars saved by the IOU (shared/contributed/ donated resources, elimination of redundant processes, shared/contributed marketing materials, discounts or reductions in the cost of installation, replacement, and repair of measures, among others are just some examples of cost savings to the IOU).
- ***Energy savings/benefits.*** Leveraging efforts are measurable and quantifiable in terms of home energy benefits/ savings to the eligible households.
- ***Enrollment increases.*** Leveraging efforts are measurable and quantifiable in terms of program enrollment increases and/or customers served.

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1.6.1. Describe the efforts taken to reach out and coordinate the Energy Savings Assistance Program with other related low income program offered outside the IOU that serve low income customers.

SDG&E continued working with its CBO community and its LIHEAP contractors to reach customers who may not have responded to other channels of marketing or for various reasons had reservations of enrolling in the program. To take advantage of these opportunities, SDG&E continued to train agency employees on how to engage customers in enrolling in the ESA Program during the customer's visit at the CBO office. Often the visit to a CBO is for another issue and the agency employee must work through the most pressing issue before addressing the utility programs with the customer. SDG&E has worked closely with its agencies to drive enrollments in the population they serve. SDG&E also continues to work on leveraging with the LIHEAP contractors to offer customers the benefit from both state and utility programs.

1.6.2. In addition to tracking and reporting whether each leveraging effort meets the above criteria in order to measure the level of success, please describe the Other Benefits resulting from this particular partnership not captured under the 3 criteria described above.

Other benefits resulting from this particular partnership not captured under the three criteria described above is providing customers with a better overall service by simplifying and streamlining enrollment processes for customers and programs involved. Customers do not have to contact individual programs separately, thereby improving the level of service offered to customers. This results in customers receiving all feasible measures from both the CSD and SDG&E programs. This is an administrative cost savings for the programs which may provide higher energy savings to the customers and allow delivery of qualified measures through the initial outreach and enrollment

contractor. Leveraging efforts is a challenge due to the high turnover of employees and the loss of expertise within the CSD agencies and each of the programs eligibility requirements for minimum number of measures.

**1.6.3. Please provide a status of the leveraging effort with CSD.
What new steps or programs have been implemented for this
program year? What was the result in terms of new
enrollments?**

SDG&E continued to work with its local LIHEAP agencies, Campesinos Unidos (CUI) and Maximizing Access to Advance Our Communities (MAAC) to leverage customer enrollments where feasible. SDG&E has continued to offer support when new hires are brought on or additional training is needed. However with the additional coaching and training provided, the results have continued to be dismal mostly in part due to excess funding from other sources allocated to the LIHEAP agencies in comparison to previous years and the need to use those funds within a specified period. This provided little to no motivation for the LIHEAP agencies to leverage with SDG&E's ESA Program. As a result, there were no leveraged enrollments in 2012.⁷

1.7. Integration Success Evaluation

According to Decision 08-11-031, "Integration constitutes an organization's internal efforts among its various departments and programs to identify, develop, and enact cooperative relationships that increase the effectiveness of customer demand side management programs and resources. Integration should result in more economic efficiency and energy savings than would have occurred in the absence of integration efforts."

⁷ In March 2009, the Commission and the California Department of Community Services and Development (CSD) executed a Memorandum of Understanding (MOU) with the mutual goal of effective leveraging to decrease duplications and increase the total number of low income households in California through increased coordination between agencies. The MOU is still in effect. Among other efforts, the Commission and CSD agreed to facilitate collaboration between the IOUs and the Local Service Providers. In D. 12-08-044 (at p. 45) the Commission reiterated its continued commitment to the objectives of the MOU, despite the challenges experienced during the 2009-2011 program cycle. .

1.7.1. Describe the new efforts in program year to integrate and coordinate the Energy Savings Assistance Program with the CARE Program.

In 2012, SDG&E's ESA Program and CARE worked jointly to ensure that all qualified CARE and/or ESA Program customers are fully aware of their eligibility for both programs and are assisted in enrollments. The Programs continued to jointly market the benefits of the programs to their similar target audiences. All mass media dollars were leveraged as a whole in order to maximize the media buys, all the while maintaining the separate program budgets. The pillar of SDG&E's marketing campaign in 2012 was using customer testimonials. SDG&E ensured testimonials were reflective of customers who participated in both the CARE and ESA Programs. SDG&E also took on initiatives to further integrate the CARE and ESA Program. The ESA Program began capturing the data from the customers who applied but did not qualify due to being previously served. ESA Program staff shared this information with the CARE Program because these customers were found to be eligible under CARE income limits. This initiative, lead to almost 450 CARE enrollments. The ESA Program and CARE Program continue to work towards leveraging customer applications for the use of both programs.

1.7.2. Describe the new efforts in program year to integrate and coordinate the Energy Savings Assistance Program with the Energy Efficiency Residential Program.

The SDG&E ESA Program continues to work closely with the SDG&E Residential Energy Efficiency (EE) program staff to integrate messaging to customers who may be able to participate in ESA Program services or EE rebate programs. SDG&E created a comprehensive *Guide for Energy Experts* and staff from the Customer Assistance, Commercial and Residential EE and Demand Response programs were cross-trained on

all programs as part of this Integrated Demand Side Management (IDSM) effort. More than 200 SDG&E employees were trained in 2012, increasing the awareness of the CARE Program and the ESA Program. This has raised the employee's to an "Ambassador" capacity allowing them to promote the programs to friends, family and neighbors across the SDG&E service territory.

The ESA Program also utilizes outreach to communities, CBOs, and branch office locations to promote the residential EE programs. In addition, the Residential EE Programs promote the Customer Assistance Programs in a number of ways. An interactive demonstration was given to promote the new Universal Audit Tool in July to the Environmental Health Coalition Organization. The staff of the organization can access the tool during their in-home visits to assist customers on ways to save energy and take advantage of the ESA Program and other EE programs and services. The CARE and ESA Programs are mentioned in the instructions of the Single Family Rebates Program Application. The *Whole House Energy Savings Guide* has a section on CARE, Family Electric Rate Assistance (FERA), ESA Program and the Medical Baseline Allowance Program.

The ESA Program has worked closely with the Energy Efficiency Programs to help launch the Energy Upgrade California MIDI Program which offers no-cost installation of weatherization measures to single family homeowners who do not meet ESA Program income guidelines.

The ESA Program has worked closely with Energy Upgrade California to develop a comprehensive plan to coordinate the installation of energy saving measures in multi-family dwellings (MUDs).

The ESA Program has also worked closely with the Mobile Home program to ensure that the contractor installs all feasible measures available under each program and is not double billing for measures installed under either program.

1.7.3. Describe the new efforts in program year to integrate and coordinate the Energy Savings Assistance Program with the Energy Efficiency Government Partnerships Program.

SDG&E continues to cross promote Residential Energy Efficiency's MicroGrid Program by distributing promotional literature during ESA Program outreach efforts. MicroGrid has a system in place to refer potentially eligible customers to the ESA Program.

1.7.4. Describe the new efforts in program year to integrate and coordinate the Energy Savings Assistance Program with any additional Energy Efficiency Programs.

The ESA Program staff participated in IDSM cross-training with the Energy Efficiency staff to raise awareness and increase the knowledge of all SDG&E employees working on Energy Efficiency and Demand Response programs, as described in 1.7.2 above.

In addition, integration efforts between the MIDI Program and the ESA Program generated 11 ESA Program enrollments in 2012.

1.7.5. Describe the new efforts in program year to integrate and coordinate the Energy Savings Assistance Program with the Demand Response Programs.

SDG&E submitted its Final Report on its Low Income In Home Display and Programmable Communicating Thermostat Pilot Programs in June 2012. The challenges and lessons learned identified in the report indicated the technology needs to become more reliable and accessible before it is ready to be provided on a large scale. Therefore, based on the findings from the pilot evaluation, SDG&E did not recommend providing Home Area Network technology to the low income customer segment through the ESA Program.

1.7.6. Describe the new efforts in program year to integrate and coordinate the Energy Savings Assistance Program with the California Solar Initiative Programs.

SDG&E has worked closely with Grid Alternatives to efficiently identify and serve any ESA Program eligible customers with all feasible measures to ensure that solar installations for single family homes can be accomplished as quickly as possible. The ESA Program enrolled customers may also be enrolled in the SASH program, which offer the low income homeowners incentives on PV solar systems.

1.8. Workforce Education & Training

1.8.1. Please summarize efforts to improve and expand Energy Savings Assistance Program workforce education and training. Describe steps taken to hire and train low income workers and how such efforts differ from prior program years.

SDG&E's workforce efforts are coordinated through SDG&E's Human Resources Department. The ESA Program worked with local agencies focused on workforce readiness to provide support to their hire-a-youth program and insights on preparing youth for future careers.

In 2012, SDG&E continued its education efforts through the Energy Innovation Center. SDG&E offers educational and technical seminars for businesses including topics such as, HVAC, lighting, motors, demand response, and sustainability. These workshops were targeted towards specific industries and associations which allow attendees to network and learn alongside others in their industry.

1.8.2. Please list the different types of training conducted and the various recruitment efforts employed to train and hired from the low income energy efficiency workforce.

SDG&E continued to encourage ESA Program contractors to have their workforce take advantage of on-going training opportunities offered by the SDG&E Energy Innovation Center. The type of training and number of contractor employees trained is listed below. ESA Program contractors perform their own recruitment and hire employees from the local communities in which they work.

Type of training or recruitment conducted	Employees trained	Employees hired
Safety & Operating Efficiency Seminars	368	Not Applicable
Technical Seminars	7,732	Not Applicable
Technical Training	164	Not Applicable
Total	8,264	

1.9. Legislative Lighting Requirements Status

1.9.1. Provide a summary on current and future CFL supply issues, as experienced by the IOU. Any current / future problems as well as potential solutions should be discussed in this paragraph.

SDG&E contractors procure CFLs under the agreement negotiated by Southern California Edison Company (SCE) for all of the electric utilities. SDG&E contractors have not reported any problems in procuring CFLs for the ESA Program.

1.9.2. Provide a summary explaining how IOU promotes the recycling/ collection rules for CFLs.

SDG&E provides information to each enrolled customer on the proper disposal of CFLs.

This information is reviewed with the customer during the enrollment process.

1.9.3. Complete Table 16 (in Appendix). In addition, please briefly summarize the CFL procurement process for the IOU, including manufacturers, distributors, warehousing, and contractor delivery.

SDG&E does not directly procure the CFLs used in its ESA Program for its contractors.

Contractors purchase directly from Lights of America, under a master contract negotiated by SCE on behalf of all of the electric IOUs as part of a statewide RFP.

1.9.4. Provide a summary of IOU activities in preparation for a draw down of CFL-supporting subsidies at the end of the 2009-2011 cycle, and where, as experienced by the IOU, they feel new lighting technologies could be used in the Energy Savings Assistance Program.

SDG&E understands that the continued subsidy of CFLs may be eliminated as the CFL product matures and is able to stand alone in the consumer market. SDG&E utilizes the CFL primarily as an offering to peak customer interest in participating in the ESA Program.

SDG&E introduced low-emitting diode (LED) nightlights a number of years ago to introduce residential customers to the new technology. Currently, the LED technology is still too expensive to be introduced into the ESA Program. If and when the technology becomes more affordable and is able to meet the Commission's adopted cost-effectiveness thresholds, SDG&E will consider adding this technology as a measure to the ESA Program.

1.10. Studies

1.10.1. For each Study, provide 1) a summary describing the activities undertaken in the study since its inception; 2) the study progress, problems encountered, ideas on solutions; and 3) the activities anticipated in the next quarter and the next year.

For the 2012 to 2014 program cycle, the ESA Program will support four statewide studies as directed in D. 12-08-044:

- An impact evaluation for program year 2011;
- A multifamily segment study;
- An energy education study; and,
- A low-income needs assessment.

During 2012, the RFPs for these studies were released and consultants were selected for each of the studies. All of the studies were scheduled to begin in 2013, so no study activity was completed in 2012. For 2013, the activity expected is described in the following table:

ESA Program Study Proposed Activity for 2013

Study	Deliverable	Expected Delivery Date
Impact Evaluation	Research Plan & Workshop	February 20, 2013
	Draft Report & Workshop	August 2013
	Final Report	August 31, 2013
Multifamily Segment Study	Research Plan & Workshop	March 5, 2013
	Phase I Draft Report & Workshop	June 2013
	Phase II Draft Report & Workshop	September 2013
Energy Education Study	Research Plan & Workshop	March 7, 2013
	Draft Report & Workshop	August 2013
	Final Report	August 31, 2013
Low-income Needs Assessment	Research Plan & Workshop	March 18, 2013
	Draft Report & Workshop	September 2013
	Final Report	October 2013

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1.10.2. If applicable, submit Final Study Report describing: 1) Overview of study; 2) Budget spent vs. authorized budget; 3) Final results of study; and 4) Recommendations.

There were no studies conducted during 2012 therefore no Final Study Reports were submitted during 2012.

1.11. Pilots

1.11.1. For each Pilot, provide 1) a summary describing the activities undertaken in the study since its inception; 2) the study progress, problems encountered, ideas on solutions; 3) the activities anticipated in the next quarter and the next year; and 4) Status of Pilot Evaluation Plan (PEP).

There were no pilot programs conducted in 2012.

1.11.2. If applicable, submit Final Pilot Report describing: 1) Overview of pilot; 2) Description of Pilot Evaluation Plan (PEP); 3) Budget spent vs. authorized budget; 4) Final results of pilot (including effectiveness of the program, increased customer enrollments or enhanced program energy savings); and 5) Recommendations.

Not applicable; there were no pilot programs in 2012.

1.11.3. “Add Back” Measures

For measures that fall below the cost effectiveness threshold under Decision 08-11-031, we require additional reporting to show the cost, energy savings impacts, and related metrics.

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1.11.4. If the "add-backs" compromise the IOUs' ability to meet the 2020 Plan goal that 100% of eligible and willing customers will have received all cost effective Energy Savings Assistance Program measures, how does the IOU propose to address the shortfall in other parts of the Energy Savings Assistance Program?

In Ordering Paragraph 38 of D. 12-08-044, the Commission directed the utilities to include in their annual reports the actual figures in the following four “add-back” measure categories:

- Measure type and climate zone;
- How many “add-back” measures were installed in each climate zone;
- The budget impacts of the “add-back” measures; and,
- The energy savings impacts of the “add-back” measures based on the assumption that the installation of measures that do not already exist in a home will increase, rather than decrease, energy usage.

The inclusion of “add backs” in the current program will not impact the utilities’ ability to meet the 2020 plan goal that 100% of eligible and willing customers will have received all cost effective ESA Program measures because the number of “add backs” in relation to the overall budget is small. Through effective program management, SDG&E is able to control program costs and deliver all feasible measures to customers. The actual figures in the four “add-back” measure categories outlined above are provided in Table 18. During 2012, SDG&E did not experience a shortfall in other parts of its ESA Program resulting from the installation of “add-back” measures and does not anticipate a shortfall for the remainder of the 2012-2014 program cycle. Therefore, SDG&E plans to continue to install “add-back” measures when feasible.

2. CARE EXECUTIVE SUMMARY

The CARE program, formerly known as the Low Income Ratepayer Assistance Program (or LIRA) was established through a legislative mandate and was implemented by the Commission in D. 89-07-062 and D. 89-09-044. The Commission expanded the program to qualified non-profit group living facilities such as women's shelters, homeless shelters in 1992. The program was further expanded to qualified agricultural employee housing facilities in D. 95.10-047. In 2005, D. 05-04-052 expanded the program to include authorized agricultural housing facilities managed by the Office of Migrant Services and other non-profit migrant farm worker housing centers.

Since 2005, income eligibility for CARE was set by the Commission at 200% of the Federal Poverty Guidelines⁸.

In 2010, the legislature enacted Senate Bill 695 which changed section 731.9 of the Public Utilities Code to state that eligibility for the CARE program should be no greater than 200% of the Federal Poverty Guidelines. In 2006, the Commission authorized utilities to implement: 1) Categorical Eligibility which allowed customers to qualify for CARE based on their participation in certain state or federal assistance programs; 2) four-year recertification for low income customers on a fixed income; 3) a process to enroll certain prospective CARE-qualified households by telephone; 4) a process to all customers to recertify their CARE eligibility through SDG&E's Interactive Voice Recognition system (IVR); and, 5) internet-based CARE enrollment and recertification.

⁸ D. 05-10-044.

In D. 08-11-031 the Commission expanded the list of categorical eligible programs to align with the program-based eligibility programs adopted for the Commission's California Lifeline Program and established an enrollment goal for CARE at 90% of the estimated eligible population.

In D. 12-08-044, the Commission approved SDG&E's CARE Program initiatives and budget for Program Years (PY) 2012-2014. In the Decision, the Commission focused on developing controls to ensure that customers enrolled for the program are truly eligible for the benefits and on enrolling the hard-to-reach customers, such as Limited English Proficient (LEP), hearing-impaired or visually-impaired customers. Some of the key initiatives included were: 1) High Usage Verification for customers exceeding 400% and above of baseline allowance, 2) Updates to the utilities probability model to include more indicators, such as method of enrollment and household size, 3) A process to review the list of Categorical programs annually to ensure only programs aligned with the CARE guidelines are included; and, 4) Approval of Outreach and Marketing funds focused on targeting multi-cultural/multi-lingual and LEP customers. The Commission also retained a goal of reaching a 90% participation rate and enrolling all eligible and willing customers into the program.

This report provides information on SDG&E's CARE program accomplishments and expenditures for PY 2012. At year-end 2012, the CARE Program had enrolled over 65,000 customers with an overall penetration rate of 85%.

2.1. Participant Information

2.1.1. Provide the total number of residential CARE customers, including sub-metered tenants, by month, by energy source, for the reporting period and explain any variances of 5% or more in the number of participants.

TABLE 1					
Residential CARE Program Electric Customers by Month			Residential CARE Program Gas Customers by Month		
PY2012	CARE Customers	Percentage Change	PY2012	CARE Customers	Percentage Change
Jan	308,496	-0.03%	Jan	206,831	-0.84%
Feb	308,257	-0.08%	Feb	208,399	0.76%
Mar	309,625	0.44%	Mar	209,308	0.44%
Apr	311,110	0.48%	Apr	210,247	0.45%
May	311,499	0.13%	May	210,447	0.10%
Jun	311,605	0.03%	Jun	210,726	0.13%
Jul	312,101	0.16%	Jul	211,254	0.25%
Aug	313,206	0.35%	Aug	212,002	0.35%
Sep	313,729	0.17%	Sep	212,039	0.02%
Oct	311,427	-0.73%	Oct	210,386	-0.78%
Nov	310,811	-0.20%	Nov	209,721	-0.32%
Dec	309,605	-0.39%	Dec	208,634	-0.52%

2.1.2. Describe the methodology, sources of data, and key computations used to estimate the utility's CARE penetration rates by energy source

2.1.2.1. Describe how the estimates of current demographic CARE-eligibility rates, by energy source for the pre-June 1st periods, were derived.

SDG&E and the other IOUs use the joint utility methodology adopted by the Commission in D. 01-03-028 to develop quarterly and monthly penetration rates for 2012. This method entails annual estimation of eligibility for CARE and the ESA Program, and other income-by-household size parameters at the small block area (block group, census tract, zip) for each IOU service territory and for the state as a whole.

Sources for this information include the Commission's current income eligibility guidelines, current year small area vendor distribution on household characteristics, Monthly Current Population Survey data ("CPS Monthly", U.S. Census); Census Public Use MicroData Sample (PUMS); 2005-2009 American Community Survey (ACS/UMS," U.S. Census); and Integrated Public Use MicroData Services ("IPUMS-CPS," Minnesota Population Center, University of Minnesota); Labor Market Information Data ("EDD/LMID"); California Employment Development Department and additional vendor data sources, including projected small area unemployment data from Synergos Technologies, Inc., and Environmental Systems Research Institute, Inc.

Estimates from the block group level are aggregated to county/utility and whole utility level among other aggregations. Annually, the utility applies count/utility level eligibility fractions to a new set of "technical eligibility counts" (for CARE these are metered and sub-metered occupied housing units) obtaining an estimate of income/demographic in household count form.

Every month, SDG&E counts the number of households (by small area, by county, and overall) that are enrolled in CARE. The CARE household total, including individually metered and sub-metered occupied housing units, is divided by the total income/demographic eligibility to provide the monthly penetration rate.

In D.12-08-044, the Commission granted the Joint Utilities' request to file the annual CARE eligibility estimates on December 31 of each year. The updated CARE eligibility estimates for 2012 was submitted to the Commission on February 16, 2012 and as amended on March 20, 2012 by Southern California Edison Company on behalf of itself and the other IOUs.

2.1.2.2 Describe how the estimates of current CARE-eligible meters were derived. Explain how total residential meters were adjusted to reflect CARE-eligible meters (i.e., master meters that are not sub-metered or other residential meter configurations that do not provide residential service.).

To derive the estimates of current CARE-eligible meters, SDG&E counted all residential meters and residential sub-metered units and excluded the residential accounts with billing tariffs that do not qualify for CARE. This result equals the number of eligible residential meters for the CARE program in SDG&E's service territory.

2.1.2.3. Discuss how the estimates of current CARE-eligible households were developed.

See SDG&E's response in Section 2.1.2 above. The methodology is based on estimating small area (block group) level household size, by income and householder-age tabulations for the current year and connecting these estimates with small area counts of households that are individually metered or sub-metered. Block group/utility specific estimates are then disaggregated/aggregated to various geographic levels within a given utility area: zip + 2, zip, tract, county, territory, etc. Statewide estimates, regardless of utility boundaries, are also provided at small and large area levels.

2.1.2.4 Describe how current CARE customers were counted.

Current CARE customers were counted by tallying the number of individually metered residential customers with an active CARE enrollment status, plus the number of sub-metered tenants receiving service through residential master-metered accounts participating in the CARE program.

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2.1.2.5 Discuss how the elements above were used to derive the utility's CARE participation rates by energy source.

The formula for calculating CARE-penetration rates is:

$$\frac{\text{Number of CARE Customers}}{\text{Number of Estimated CARE-Eligible Households}}$$

2.1.3. Provide the estimates of current demographic CARE-eligibility rates by energy source at year-end.

Electric - 29.35%

Gas - 28.00%

2.1.4. Provide the estimates of current CARE-eligible sub-metered tenants of master-meter customers by energy source at year-end.

Electric - 20,542

Gas - 13,663

2.1.5. Provide the current CARE sub-metered tenant counts by energy source at year-end.

Electric – 16,523

Gas – 13,909

2.1.6. Provide the current CARE sub-metered penetration rates by energy source at year-end

Electric - 80.44%

Gas - 101.8%

2.1.7. Discuss any problems encountered during the reporting period administering the CARE program for sub-metered tenants and/or master-meter customers.

SDG&E did not encounter any problems administering the Submetered CARE program during the reporting period.

2.2. CARE Program Summary

2.2.1. Please provide CARE program summary costs.

CARE Budget Categories	Authorized Budget	Actual Expenses	% of Budget Spent
Outreach	\$2,125,410	\$1,657,122	78%
Proc., Certification and Verification	\$1,032,415	\$326,855	32%
Information Tech./Programming	\$1,245,390	\$343,667	28%
Pilots	\$108,000	\$88,873	82%
Measurement and Evaluation	\$42,500	\$11,432	27%
Regulatory Compliance	\$154,917	\$154,564	100%
General Administration	\$492,559	\$428,000	87%
CPUC Energy Division Staff	\$49,535	\$20,259	41%
Cooling Centers	\$0	\$0	0%
Total Expenses	\$5,250,726	\$3,030,892	58%
Subsidies and Benefits	\$73,857,625	\$63,894,160 ⁹	87%
Total Program Costs and Discounts	\$79,108,351	\$66,925,052	85%

2.2.2. Please provide the CARE program penetration rate to date.

CARE Penetration			
Participants Enrolled	Eligible Participants	Penetration rate	Target Met?
309,605	364,424	85%	No

⁹ See Section 2.3.1.2 regarding CARE Subsidy.

2.2.3. Report the number of customer complaints received (formal or informal, however and wherever received) about their CARE recertification efforts, and the nature of the complaints.

CARE Recertification

Month	Complaints Received	Nature of Complaint	Cases Resolved
July	Not Tracked	SDG&E experienced technical difficulties with the AVM recertification campaign. Several customers indicated the calls were dropping off as soon as they answered the phone. SDG&E immediately ceased the campaign and began to investigate the issue. Working with our AVM vendor, Soundbite, it was discovered to be a telephone carrier issue, meaning the carrier, whether it be AT&T, Cox, etc., was having technical issues at the Time. SDG&E resumed the campaign and no further issues occurred.	Yes
December	1	Customer was upset they no longer qualified due to revisions to the CARE income eligibility guidelines for one-person households. Customer was referred to 211 San Diego to determine if there were other assistance programs available to them.	Yes

2.3. CARE Program Costs

2.3.1. Discount Cost

2.3.1.1. State the average monthly CARE discount received, in dollars, per CARE customer by energy source.

Average Monthly Gas Discount: \$4.77

Average Monthly Electric Discount: \$13.93

2.3.1.2 State the annual subsidy (discount) for all CARE customers by energy source

Gas Subsidy - \$11,092,121

Electric Subsidy - \$52,802,039

In mid-April SDG&E discovered an accounting error in the electric subsidy totals reported in prior years' Annual Reports. SDG&E is in the process of determining the effective date of the error and will file amendments to the affected Annual Reports as soon as possible.

2.3.2. Administrative Cost

2.3.2.1. Show the CARE Residential Program's administrative cost by category.

See Section 2.2.1 above or CARE Table 1 attached to this report.

2.3.2.2. Explain what is included in each administrative cost category.

Outreach: This category represents all costs for printing and mailing of CARE applications/documents, printing and mailing of the annual notification, postage, bill inserts, brochures and flyers, advertising, targeted direct mail and telephone campaigns, community event sponsorships and support, distribution of collateral materials, outreach staff labor, and other outreach and enrollment efforts. Capitation payments¹⁰ and any agency-related outreach support efforts are also included in this category.

¹⁰ Capitation payments are compensation fees paid to third-parties and community-based organizations that facilitate CARE enrollment for eligible hard-to-reach customers.

Processing, Certification and Verification: These costs include the CARE Administration Group labor and data entry costs. The function of the CARE Administration Group includes: 1) opening and sorting CARE application forms; 2) processing/data entering all CARE applications; 3) initiating and responding to customers' inquiries regarding CARE applications/program; 4) fielding telephone calls related to CARE program participation; and, 5) resolving billing issues related to CARE program enrollment.

Information Technology (IT) /Programming: This category represents all IT support costs to maintain the CARE billing system, CARE documents, CARE database, system reports, data exchange with other utilities, undertaking system enhancements to comply with Commission mandates, and improving operational efficiencies.

Measurement and Evaluation: Costs for measurement and evaluation includes contract and staff labor expenses for CARE participant eligibility updates are tracked in this category.

Regulatory Compliance: These costs include labor and non-labor costs related to the preparation of various regulatory filings, including program applications, advice letter filings, regulatory reports, comments, tariff revisions, attendance at working group meetings, public input meetings and other Commission hearings or meetings.

General Administration: General Administration costs include office supplies; market research; and program management labor and expenses.

Commission Energy Division Staff Funding: This category of expenses reflects costs incurred by the Commission's Energy Division staff in support of the Commission's authorized low-income program.

2.3.3. Provide the year-end December 31 balance for the CARE balancing account.

Electric CARE - \$13,774,048 under-collected balance.

Gas CARE – \$2,002,085 over-collected balance.

In mid-April, SDG&E discovered an accounting error in the CARE electric balancing account totals and expects to make an adjustment to the balancing account at the end of May 2013 to correct the error. In addition, SDG&E is determining the effective date of the error and will submit an amendment to any prior years' Annual Reports affected by the error as quickly as possible.

2.3.4 Describe which cost categories are recorded to the CARE balancing account and which are included in base rates.

The general cost categories recorded to the CARE gas and electric balancing accounts include the CARE discount and the program specific administrative expenses as described in section 2.3.2.1. No CARE costs are charged to base rates.

2.3.5. Provide a table showing, by customer class, the CARE surcharge paid, the average bill paid, the percentage of CARE surcharge paid relative to the average bill, the total CARE surcharge collected, and the percentage of total CARE revenues paid.

See CARE Table 10 in the Attachments.

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2.4. Outreach

2.4.1. Discuss utility outreach activities and those undertaken by third parties on the utility's behalf.

Direct Marketing

Targeted communication channels that seek to drive a specific call to action from customers.

In 2012, SDG&E's direct marketing efforts included targeted email and automated voice messaging (AVM) campaigns, bill inserts, direct mail and door to door campaigns.

Email campaigns

SDG&E conducted monthly email campaigns, targeting customers with different campaigns which contained dynamic content, creative, and subject lines. Email campaigns were designed to mirror congruent print campaigns in order to resonant familiarity with customers. Almost 7,000 enrollments were generated by email campaigns in 2012.

Automated Voice Messaging (AVM) Campaigns

Ten AVM campaigns took place in 2012. SDG&E administered the calls through an outbound dialing system, provided by a third party. The system allowed SDG&E to contact thousands of customers during time frames SDG&E designated. The campaigns utilized a script that was developed by SDG&E to capture customer information including household size, household income and enrollment in any public assistance programs. In 2012, almost 4,000 customers chose to enroll in the program using the AVM dialer. SDG&E also used the AVM to recertify customers in advance of the

automated renewal letter sent to customers due to recertify their eligibility with the program. In 2012, almost 10,000 customers chose to renew their eligibility using the AVM dialer. Customers who chose not to use the AVM to renew continued down the path of regular recertification and were given the option to renew by mail.

Bill inserts

SDG&E's annual notification to all non-CARE customers took place in July. All customers not already enrolled in the CARE program, received a bilingual program application inside their SDG&E bills. In addition to July's insert, SDG&E bills contained an English only CARE application during the months of April and October. In 2012, all bill inserts contributed approximately 1,500 enrollments for the program.

Direct mail

In the past SDG&E used targeted direct mailings to generate a call to action from customers. Typical mailings included a letter detailing the program benefits and qualifications, a program application, and paid business reply envelope. In seeking lower cost solutions that would also alleviate application processing time, SDG&E began using email campaigns with more frequency, as well as sending lower cost postcard type mailings that encouraged customers to apply online or call. Calculating returns on these types of mailings wasn't possible due to the fact that customers were not required to send something back to SDG&E. In 2012, SDG&E sent a postcard notification to customers encouraging them to apply online or call the CARE program for enrollment. SDG&E also sent a direct mail package containing both a letter and CARE application in

December, 2012. Before the year concluded, 15 enrollments were obtained as a result, and responses are continuing to trickle in.

Door-to-Door

Targeting hard to reach neighborhoods, SDG&E worked with a third party to train, collaborate, and strategize a door-to-door campaign. The door-to-door contractors interacted with customers face to face and were able to further explain the program qualifications and benefits, and enroll customers on the spot. In 2012, over 8,000 customers were enrolled through door-to-door efforts.

Integration Efforts

Represents the combined efforts of internal resources to raise program awareness and create a positive customer experience.

In 2012, SDG&E's integration efforts included; interactive voice response, ES Specialists, branch offices, field collection and calls, and informational brochures.

Interactive voice response (IVR)

SDG&E's Energy Service Center assists customers with a variety of inquiries on a daily basis. While waiting to speak with an ES Specialist, customers are provided information about the CARE program in both English and Spanish. Customers are also provided the option to request a CARE application through this process. In 2012, 4,331 applications were requested in English and 742 were requested in Spanish. The CARE program has a specific IVR system dedicated to the program in which customers may call and enroll

over the phone using their touchtone keypad to answer the program eligibility questions. The system, available in English and Spanish, collected over 5,000 enrollments in 2012.

Energy Service Specialists

SDG&E's customer contact center continues to advise and provide customers with enrollment options for the CARE program. ES Specialists advise customers with high bills or those inquiring about past due amounts of resources available to them such as the CARE program. Customers indicating eligibility or interest are referred to the Internet application, the CARE enrollment IVR, or are mailed a CARE application to their home. SDG&E is not currently able to track the enrollment the ES Specialist referred to the Internet or the IVR, however, SDG&E tracked over 7,000 enrollments through source coded paper applications generated through the ES Specialists efforts.

Branch Offices

Customer Assistance leverages the resources of all five of SDG&E's bill payment locations to enroll customers in the CARE Program and ESA Program. Customer service representatives offer program benefits to customers as they come in to pay their bills. In 2012, the collaboration with the branch offices generated over 7,000 new CARE enrollments and 1,000 new ESA Program enrollments.

Field Collection

SDG&E field collectors deliver notices to customers facing disconnection. During this process, the collectors leave CARE program information for customers.

Collection Call

SDG&E provides an additional outbound telephone call with a follow up letter to customers facing collection activity on their accounts. Information about the availability of payment arrangements and assistance programs is detailed in the letter.

Informational Brochures

New residential customers entering SDG&E's service territory for the first time receive a welcome packet. The packet includes information for the first time customer as well as a CARE application. The application is included in both the English welcome packet and the Spanish welcome packet. In 2012 over 80,000 English welcome packets and almost 4,000 Spanish welcome packets were mailed to new customers.

Mass Media

Diversified communication mediums designed to reach large masses of audiences and serve as the overall awareness driver. Examples include print, TV, radio, and online media.

In 2012, SDG&E used print, TV, radio and online media campaigns as the primary awareness source for the programs.

Print Campaigns

SDG&E developed culturally relevant print ads for the African-American and Hispanic audiences and were placed in publications such as San Diego Voice & Viewpoint, The Monitor, Enlace and Vida Latina. SDG&E also developed an employee testimonial campaign that centered on reaching the Asian American segments, specifically the

Chinese, Vietnamese and Filipino communities. SDG&E employees gave their thoughts on how the programs relate to their communities. The ads ran in various Chinese, Vietnamese, and Filipino publications. These print ads were modified for online banner ads as well.

TV Spots

SDG&E used thirty and fifteen second commercials to target the Hispanic and general market audiences. The commercials aired on various English and Spanish television channels and explained the benefits of the program including options for applying.

Radio Traffic IDs

Fifteen and ten second traffic IDs ran on various English and Spanish language radio stations. The ID's highlighted the program benefits and how to apply. In addition, SDG&E took part in an interview with Spanish radio station, Televisa (XEWT/XHUA). The program Notivisa Buenos Dias, the morning news program, featured an interview with SDG&E which highlighted both the CARE and ESA Programs.

Online Campaigns

SDG&E's online strategy was threefold; 1) increase awareness for the programs, 2) drive online submissions, and 3) geo-target SDG&E's service territory and target lower income segments. The nine month campaign took place in three phases, using paid search, ad networks, Spanish language networks, and news publishers. The paid search approach used Google AdWords to target users searching for assistance programs. Paid search had a click through rate (CTR) of 2.42%. CTR is defined as the percentage of times a paid

search ad is clicked on out of the total number of paid search ad views within a given time period. While industry standards in the utility industry aren't established, this is an improvement upon last year's performance. Ad networks were used for behavioral targeting or geo-targeting. SDG&E used pre-roll video on networks like TubeMogul and ValueClick. There were over 19,000 clicks from the ValueClick page to the SDG&E web site containing program information. The campaign also used Spanish language network, Alcance to target the Spanish speaking demographic. The campaign had a CTR of .38% which improved upon last year's CTR of .013%. News networks remained the back bone of the campaign, using local and community networks like U-T Tribune, CBS8, and 10news.com for pre-roll video. Display ads continued in 2012 with ads containing a match and save type creative game, in both English and Spanish, as well as newly developed creative ads consistent with the campaign print ads. Display ads had an overall CTR of .30%.

Ethnic Marketing

In D. 12-08-044, the Commission directed the utilities to embrace and recognize the importance of community local, regional, ethnic as well as ethnically-owned media as ways of effectively reaching and penetrate some of the most difficult to reach pockets of the low income communities and directed the utilities to track and report on the progress of these outreach and enrollment efforts in their annual reports. D. 12-08-044 further states that the reporting should indicate specific activities and contracts, actual expense as well as qualitative and quantitative attributes of resulting program enrollments from each

effort.¹¹ SDG&E reached out to different ethnic segments such as Hispanic, African American, Chinese, Vietnamese, and Filipino with an array of mass media tactics. In total, \$191,806 was spent on reaching ethnic audiences. This included online media – paid search and display ads, as well as print ads in ethnic publications.

Ethnic Online (paid search/display ads)		
Audience	Impressions	Total Spent
Spanish	3,670,165	\$38,078
Chinese	3,066,667	\$27,400
Vietnamese	3,475,000	\$10,355
Filipino	2,300,000	\$20,700

Ethnic Print Media		
Audience	Readership	Total Spent
Spanish	1,735,000	\$21,282.00
Chinese	2,350,000	\$33,764.00
Vietnamese	487,500	\$7,200.00
Filipino	515,000	\$10,600.00
African American	797,500	\$9,482.00

2.4.2. Discuss the most effective outreach method, including a discussion of how success is measured.

SDG&E’s most effective outreach method is measured by the volume of applications submitted for enrollment, the conversion rate of application to enrollment, and by the cost associated with the outreach effort. In 2012, SDG&E continued to focus efforts with internal partners to leverage customer contact opportunities with CARE enrollments.

These efforts include greater involvement by Branch Office personnel in enrolling

¹¹ D. 12-08-044, Conclusions of Law 7 and 8.

customers on the spot versus providing customers with applications to submit back to the utilities. Prior to offering CARE enrollment, the customer account was reviewed to determine if the customer was not already participating in the program. Over 8,600 applications were received by the branch offices and 86% were converted to eligible enrollments. There was no additional cost to the program for this leveraging effort.

2.4.3. Discuss barriers to participation encountered during the reporting period and steps taken to mitigate them.

SDG&E struggles with increasing enrollments in order to exceed the ongoing attrition rate. In 2012, combined outreach efforts produced over 65,000 eligible CARE applications. Concurrently, almost 64,000 CARE customers were lost to attrition. Of the customer losses through attrition, approximately 2,500 CARE customers were removed at the customer's request, the highest total number of removals in the last 3 years. The remaining customers were removed primarily due to customers moving or not responding to post enrollment verification requests and recertification requests. As the economy continues to improve, the expectation is more customers will continue to improve their financial situations and no longer need the program. As for the attrition rate, SDG&E will continue to aggressively market the program, and work on offering more options for renewal and verification in order to increase the retention rate for those who still need the program.

The improving economy and ever shrinking pool of eligible customers continues to be a challenge. Tactics, such as AVM, are no longer producing high results. While AVM was relied upon as a top enrollment producer, results have waned in the past year. SDG&E adapted to the change by introducing email campaigns on a regular basis.

2.4.4. Discuss how CARE customer data and other relevant program information is shared by the utility with other utilities sharing its service territory.

SDG&E and Southern California Gas Company (SoCalGas) exchange a data file of the shared services territory in Southern Orange County. SDG&E conducts a data match of all CARE customers in that shared territory. If a customer is enrolled in the CARE program at SoCalGas and not at SDG&E, they will then automatically be enrolled. The reverse is done for SDG&E CARE customers. SDG&E enrolled 670 customers through its data sharing efforts with SoCalGas.

2.4.5 Discuss how CARE customer data and other relevant program information is shared within the utility, for example, between its Energy Savings Assistance Program and other appropriate low-income programs.

SDG&E's ESA Program offers CARE information to program recipients as part of its in-home energy education, and provides customers an opportunity to apply for CARE through that process. A check box is located on the weatherization assessment form that allows the customer to "opt in" to the CARE program. The CARE program was able to extract customer data from the ESA database for those customers indicating an interest in CARE and were determined eligible for participation based on income documentation provided as part of qualifying for the ESA Program. SDG&E also leveraged information received from customers applying online for the ESA Program. CARE new enrollments from the ESA Program totaled 3,817 in PY2012.

2.4.6 Describe the efforts taken to reach and coordinate the CARE program with other related low income programs to reach eligible customers.

The CARE outreach team has developed relationships and partnerships with various CBOs that serve the low income population. Leveraging the services they already provide, lower income clients were able to learn about and enroll in the CARE program.

SDG&E's Multi-Cultural and Multi-Lingual partner, The Harris Group leveraged their relationships with organizations specializing in reaching out to diverse communities – including immigrant and senior communities. Leveraging the already established relationship eliminated the trust barrier and allowed education on the CARE program to take place.

2.4.7. Describe the process for cross-referral of low-income customers between the utility and CSD. Describe how the utility's CARE customer discount information is provided to CSD for inclusion in its federal funds leveraging application. (Note: These agreements are limited to sharing 1-800 phone numbers with customers and providing CARE benefit information for the federal fiscal year, October 1 of the current year through September 30 of the subsequent year. There are no tracking mechanisms in place to determine how many customers contact the other programs or actually become enrolled in other program(s) as a result of these agreements.)

As part of SDG&E's leveraging agreement with the CSD, SDG&E continues to promote the CSD's LIHEAP bill payment assistance and weatherization services. SDG&E provides, on its applications and other program materials, CSD's telephone number for customers to call for additional information. SDG&E CARE Processing staff also assists customers calling regarding the CARE discount with information on how to receive bill assistance through CSD's HEAP program. In addition, SDG&E's agreement with 2-1-1 San Diego calls for part of the customer screening to include referral to LIHEAP agencies (CUI and MAAC), as appropriate. In 2012, 2-1-1 San Diego handled over 28,000 utility-related calls and referred 22,000 of those to LIHEAP agencies.

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2.4.8. Discuss any recommendations to improve cost-effectiveness, processing of applications, or program delivery. Discuss methods investigated or implemented by the utility or third parties under contract to the utility to improve outreach and enrollment services to non-participating households in the prior year. Provide cost-effectiveness assessments, if available.

SDG&E continuously looks at areas for improvement for CARE enrollment and processing. In 2012, SDG&E implemented several system enhancements to improve program processes and support regulatory changes. SDG&E simplified tracking for applications processed from tenants of submetered facilities, and a new application processing function was added at the individual unit level versus the application processing screen. Prior to this enhancement, processors were required to create a unit for the submetered facility (if not already available) in one screen, then move to another screen to create a new application. The processors are now able to select the new CARE Application icon on the unit screen and have the unit information prepopulated on the application.

2.5. Processing CARE Applications

2.5.1. Describe the utility's process for recertifying sub-metered tenants of master-meter customers.

Tenants of sub-metered facilities follow similar recertification guidelines as those set for the CARE participants. Tenants are provided with a two-year or a four-year recertification period, depending on whether they can be identified as fixed income tenants. Once tenants are due to recertify, they are provided with a mailed renewal request. If no response is received within 60-days, SDG&E will mail a second request to the tenants prior to removal.

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2.5.2. Describe any contracts the utility has with third parties to conduct certification, recertification and/or verification on the utility's behalf. Describe how these third-party efforts compare to the utility's efforts in comparable customer segments, such as hard-to-reach or under-served. Include comparisons of effectiveness and cost-effectiveness of comparable customer segments, if available.

SDG&E contracts with an organization, The Harris Group, for enrollment purposes.

SDG&E believes leveraging the efforts of The Harris Group, an organization with an established relationship with the community and key stakeholders is an asset for the utility. At a cost of \$15 per enrollment, it's a lower cost option that pays larger dividends as community stakeholders, senior organizations, immigrant organizations and schools have a long standing relationship with The Harris Group. The Harris Group's unique multicultural/multilingual component instills trust in harder to reach segments as customers are more apt to trust the culturally diverse workforce.

2.6. Program Management

2.6.1. Discuss issues and/or events that significantly affected program management in the reporting period and how these were addressed.

In May 2012, the CARE income guidelines were updated and adjusted to reflect the requirements of Section 739.1 of the Public Utilities Code which states that for CARE, total household income should be no greater than 200% of the Federal Poverty Guidelines. Prior to the 2012 update, the income guidelines for a single or two person household were combined and provided the benefit of using the guideline of a two person household for a single person household. The change created a significant adjustment downward in the income requirement for a single person household. Additionally, the two person household income was also slightly reduced downward.

The change posed a couple of challenges for program management. The first challenge was handling customer applications for single member households who were eligible on

May 31, but no longer eligible on June 1. To mitigate the issue, SDG&E ensured all applications received prior to June 1st were processed with the effective guidelines, ensuring compliance with the program and consistency with the application. Customers applying after the June 1st cut-off were notified by SDG&E that they were no longer eligible according to the new income guidelines.

The second challenge was how best to procedurally renew or income verify customers.

The challenge concerned customers who may receive the first renewal or verification notice with the May guidelines and later receive a second notice with a different guideline. To reduce customer confusion, SDG&E temporarily suspended the process for renewal and income verification. Both processes resumed once all documents were updated with the new guidelines in June.

Interim Post-Enrollment Verification and Recertification Model

In D. 12-08-044, the Commission ordered the utilities to review their past post enrollment and re-certification records and to develop and implement interim probability models using the following income factors:

- High energy use
- Annual bill amounts
- Household size
- PRIZM or ZIP code
- Enrollment method
- Previously indicated customers ineligibility
- Customer previously de-enrolled from the CARE program
- Length of program enrollment
- Length of time lapse since previously income verified

The purpose of the new model was to: (1) ensure meaningful size in sampling to yield the necessary results to aid in the development of effective long-term models for the Utilities; (2) ensure the integrity of the CARE program; (3) provide assurance that the CARE

discount rates are received only by those lawfully intended to receive them; (4) remove any fraud and abuse; and (5) properly factor in potential program disruptions as well as administrative cost. The utilities were to review the data obtained from the interim model in order to develop long-term models in 2013.

In November 2012, SDG&E completed the design of the interim probability model and began requesting income verification using the new model. Results of the 2012 verification requests can be found in the CARE Table 3, included in this report. SDG&E is currently in the process of reviewing the initial results to determine if enough information is available at this time to make adjustments to the interim model.

CHANGES Pilot Program

In D. 12-12-011 (CHANGES Decision), the Commission approved the continued funding for the Community Help and Awareness with Natural Gas and Electricity Services Pilot Program¹² (CHANGES) through the CARE program budget for the remainder of the 2012-2014 program cycle or until alternate or complementary funding can be put into place, whichever is sooner. The CHANGES Decision also directed the utilities to work with the Commission's Consumer Service and Information Department, the Pilot Program's contractor and community-based organizations, as necessary, to develop pilot program success criteria and to facilitate and improve the tracking, monitoring and oversight of the CHANGES Pilot Program efforts consistent with the directives provided in the CHANGES Decision and D. 12-08-044. The overall objectives of the

¹² On November 19, 2010, the Commission approved Resolution CSID-004 and approved the CHANGES Pilot Program and authorized CARE funding for the one-year Pilot Program for one-year. On November 10, 2011, the Commission issued Resolution CSID-005 which authorized continued CARE funding for the CHANGES Pilot Program. CSID did not authorize funding for the Pilot beyond December 31, 2012.

collaborative efforts are to: 1) identify and eliminate unnecessarily duplicative efforts between the CARE Program's marketing, education and outreach activities and the CHANGES Pilot Program's activities; 2) improve the utilities marketing, outreach, and education activities, where appropriate; and, 3) ensure effectiveness of the CHANGES activities, relating to the CARE Program, in furthering the CARE Program objectives. The CHANGES Decision also directed the utilities to submit the set of pilot program success criteria and a plan for improving the pilot program tracking as ordered in the CHANGES Decision by March 26, 2013 for review by the Administrative Law Judge.¹³ On March 26, 2013, SCE, on behalf of itself, SDG&E, Southern California Gas Company, and Pacific Gas and Electric Company requested a 90-day extension to allow parties to continue working on and reach agreement on a few outstanding issues. SDG&E anticipates that it will be able to report on the progress of the CHANGES Pilot Program in its 2013 Annual Report if the Administrative Law Judge is able to authorize the utilities' proposed success criteria and improved pilot program tracking in a timely manner.

3. CARE EXPANSION PROGRAM

3.1. Participant Information

3.1.1. Provide the total number of residential and/or commercial facilities by month, by energy source for the reporting period.

See CARE- Table 12- CARE Expansion Program.

¹³ D. 12-12-011, Ordering Paragraphs 3 and 9.

3.1.1.1. State the total number of residents (excluding caregivers) for residential facilities, and for commercial facilities, by energy source, at year-end.

<u>Facility Type</u>	<u>Electric</u>	<u>Gas</u>
Commercial	5,474	2,938
Residential	1,621	1,064

3.2. Usage Information

3.2.1. Provide the average monthly usage by energy source per residential facility and per commercial facility.

<u>Commodity</u>	<u>Residential</u>	<u>Commercial</u>
Gas	33	310
Electric	518	4,918

3.3 Program Costs

3.3.1 Administrative Cost (Show the CARE Expansion Program's administrative cost by category).

Expanded CARE program cost totaled \$5,378. These costs are associated with application processing. Costs for Program Management and Outreach are insignificant and are accounted for the general CARE program budget.

3.3.1.1. Discount Information

3.3.1.2. State the average annual CARE discount received per residential facility by energy source

Residential Facility Gas Discount - \$81.70

Residential Facility Electric Discount - \$229.40

3.3.1.3. State the average annual CARE discount received per commercial facility by energy source.

Commercial Facility Gas Discount - \$484.31

Commercial Facility Electric Discount - \$2,140.85

3.4 Outreach

3.4.1 Discuss utility outreach activities and those undertaken by third parties on the utility's behalf.

SDG&E employees are the most effective outreach source for providing program information. Through their regular interaction with non-profit organizations, SDG&E Market Advisors are able to identify opportunities to provide organizations with the information regarding program participation.

3.4.2. Discuss each of the following:

3.4.2.1. Discuss the most effective outreach method including a discussion of how success is measured.

SDG&E partners with non-profit organizations throughout the community for CARE enrollment purposes. SDG&E's Market Advisors visit these partners regularly to promote all Customer Assistance programs. This provides the advisors with the opportunity to promote the Expanded CARE program for qualifying facilities. The cost for such outreach is insignificant to the program, making these efforts efficient and effective for participations.

3.4.3.2. Discuss how the CARE facility data and relevant program information is shared by the utility with other utilities sharing service territory.

SDG&E does not have any participating Expanded CARE facilities in its shared service territory with SoCalGas.

3.4.2.3 Discuss barriers to participation encountered in the prior year and steps taken to mitigate these, if feasible, or not, if infeasible.

There were no barriers to participation encountered within the reporting period.

3.4.3 Discuss any recommendations to improve the cost-effectiveness, processing of applications, or program delivery. Discuss methods investigated or implemented by the utility or third parties on the utility's behalf to improve outreach and enrollment services to non-participating facilities in the prior year. Provide cost-effectiveness assessments, if available.

Expanded CARE processing is a complicated and time consuming process. Each facility needs to be reviewed in great detail to ensure all eligible satellite accounts have been included as part of the application. Often, accounts previously listed are excluded during the application process. To ensure this was not done in error, SDG&E contacts the applicant to verify the completeness of the applications. SDG&E also reviews the appropriateness of the inclusion of certain accounts, ensuring the accounts are not being used as office space. SDG&E implemented improvements to help the long-term linking of the facilities by creating one main facility with all the accounts listed under it. When one of the accounts close, the account is automatically updated with the current list of linked accounts. This helped streamline the process significantly, however the process still remains complicated. SDG&E will continue to look for areas of improvement over the next program year in preparation for the 2014 renewal process.

3.5 Program Management

3.5.1. Discuss issues and/or events that significantly affected program management in the reporting period and how these were addressed.

SDG&E conducted the bi-annual renewal process for facilities participating in the Expanded CARE program. The renewal poses a challenge in that often the contact person may change from year-to-year and the renewal information is not received by the new contact. To mitigate the issues, SDG&E conducted phone calls to non-responding agencies to verify the contact information. This made a significant impact in ensuring a successful outcome for the renewal process.

4. FUND SHIFTING

4.1.1. Report Energy Savings Assistance Program fund shifting activity that falls within rules laid out in Section 20.1 of D. 08-11-031

On December 20, 2012, an Assigned Administrative Law Judge Ruling¹⁴ was issued granting SDG&E's Amended Motion to Shift \$4.2 million in unspent 2011 electric department funds to the 2012 gas department budget, and \$3,227,895 from its 2012 authorized electric department funds to its 2012 gas department budget.¹⁵

4.1.2. Report CARE fund shifting activity that falls within rules laid out in Section 20.1 of D. 08-11-031.

There was no CARE fund shifting activity during 2012.

¹⁴ Administrative Law Judge's Ruling Granting San Diego Gas & Electric Company Authority To Shift Funds

¹⁵ Amended Motion Of San Diego Gas & Electric Company (U902M) To Shift Energy Savings Assistance Program Funds, dated December 10, 2012.

4.1.3. Was there any Energy Savings Assistance Program or CARE fund shifting activity that occurred that falls OUTSIDE the rules laid out in Section 20.1 of D. 08-11-031? No fund shifting occurred outside of the rules laid out in Section 20.1 of D. 08-11-031

There was no ESA Program or CARE fund shifting activity which occurred that was outside of the rules established in Section 20.1 of D. 08-11-031 during 2012.

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5. COMMONLY USED ACRONYMS

CARE	California Alternate Rates for Energy
CBO	Community-Based Organization
CFL	Compact Fluorescent Lamp
CPUC	California Public Utilities Commission
CSI	California Solar Initiative
D.	Decision
CSD	California Department of Community Services & Development
DDTP	Deaf and Disabled Telecommunications Program
DRP	Demand Response Program
DSM	Demand Side Management
EE	Energy Efficiency
ESA	Energy Savings Assistance
FERA	Family Electric Rate Assistance
HEAT	Home Energy Assistance Tracking
IHD	In Home Display
IOU	Investor-Owned Utility
kW	Kilowatt
kWh	Kilowatt Hour
LIEE	Low Income Energy Efficiency
LIHEAP	Low Income Home Energy Assistance Program
MOU	Memorandum of Understanding
mW	Megawatt
mWh	Megawatt Hour
NGAT	Natural Gas Appliance Testing
OP	Ordering Paragraph
PCT	Programmable Communicating Thermostat
PEV	Post Enrollment Verification
PFM	Petition for Modification
PG&E	Pacific Gas & Electric Company
PPP	Public Purpose Program
PY	Program Year
SCE	Southern California Edison
SDG&E	San Diego Gas & Electric Company
SoCalGas	Southern California Gas Company
TDD	Telecommunications Device for the Deaf
TRC	Total Resource Cost Test
UC	Utility Costs
SSI	Supplemental Security Income
SSD	Supplemental Security Disability
SSP	Social Security Pension

6. APPENDIX: ENERGY SAVINGS ASSISTANCE PROGRAM TABLES AND CARE TABLES

Energy Savings Assistance Program- Table 1- Energy Savings Assistance Program
Overall Program Expenses

Energy Savings Assistance Program- Table 2- Energy Savings Assistance Program
Expenses & Energy Savings by Measures Installed

Energy Savings Assistance Program- Table 3- Energy Savings Assistance Program
Cost Effectiveness

Energy Savings Assistance Program- Table 4- Energy Savings Assistance Program
Penetration

Energy Savings Assistance Program- Table 5- Energy Savings Assistance Program
Direct Purchases & Installation Contractors

Energy Savings Assistance Program- Table 6- Energy Savings Assistance Program
Installation Cost of Program Installation Contractors

Energy Savings Assistance Program- Table 7- Expenditures by Cost Elements

Energy Savings Assistance Program- Table 8- Detail by Housing Type and Source

Energy Savings Assistance Program- Table 9- Life Cycle Bill Savings by Measure

Energy Savings Assistance Program- Table 10- Energy Rate Used for Bill Savings
Calculations

Energy Savings Assistance Program- Table 11- Bill Savings Calculations by Program
Year

Energy Savings Assistance Program- Table 12- Whole Neighborhood Approach

Energy Savings Assistance Program- Table 13- Categorical Enrollment

Energy Savings Assistance Program- Table 14- Leveraging

Energy Savings Assistance Program- Table 15- Integration

Energy Savings Assistance Program- Table 16- Lighting

Energy Savings Assistance Program- Table 17- Studies & Pilots

Energy Savings Assistance Program- Table 18- “Add Back” Measures

Energy Savings Assistance Program- Table 19- Energy Savings Assistance Program
Fund Shifting

CARE- Table 1- CARE Overall Program Expenses

CARE- Table 2- CARE Enrollment, Recertification, Attrition, and Penetration

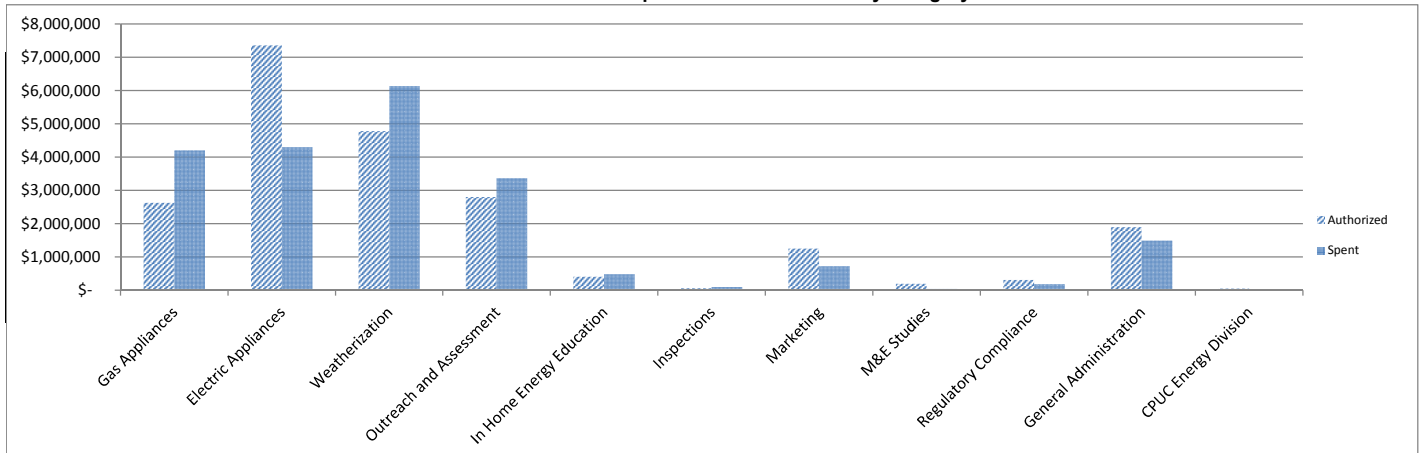
CARE- Table 3- CARE Verification
CARE- Table 4- Self Certification and Re-Certification
CARE- Table 5- Enrollment by County
CARE- Table 6- Recertification Results
CARE- Table 7- Capitation Contractors
CARE- Table 8- Participants per Month Fund Shifting
CARE- Table 9- Average Monthly Usage & Bill
CARE- Table 10- CARE Surcharge & Revenue
CARE- Table 11- CARE Capitation Applications
CARE- Table 12- CARE Expansion Program
CARE- Table 13- CARE Fund Shifting

PY2012 Energy Savings Assistance Program Annual Report
Energy Savings Assistance Program Table 1
Energy Savings Assistance Program Overall Program Expenses
San Diego Gas & Electric Company

Energy Savings Assistance Program:	2012 Authorized Budget ¹			2012 Annual Expenses			% of 2012 Budget Spent		
	Electric	Gas	Elec & Gas - Authorized	Electric	Gas	Elec & Gas - Spent	Electric	Gas	Elec & Gas
Energy Efficiency									
- Gas Appliances		\$ 2,626,325	\$ 2,626,325	\$ -	\$ 4,201,557	\$ 4,201,557	0%	160%	160%
- Electric Appliances	\$ 7,361,534		\$ 7,361,534	\$ 4,302,956	\$ -	\$ 4,302,956	58%	0%	58%
- Weatherization	\$ 1,428,577	\$ 3,353,045	\$ 4,781,622	\$ -	\$ 6,135,445	\$ 6,135,445	0%	183%	128%
- Outreach and Assessment	\$ 1,399,746	\$ 1,399,746	\$ 2,799,492	\$ 1,685,156	\$ 1,685,156	\$ 3,370,312	120%	120%	120%
- In Home Energy Education	\$ 202,988	\$ 202,988	\$ 405,976	\$ 241,022	\$ 241,022	\$ 482,045	119%	119%	119%
- Education Workshops			\$ -			\$ -	0%	0%	0%
- Pilot			\$ -			\$ -	0%	0%	0%
Energy Efficiency TOTAL	\$ 10,392,845	\$ 7,582,104	\$ 17,974,949	\$ 6,229,134	\$ 12,263,181	\$ 18,492,315	60%	162%	103%
Training Center			\$ -			\$ -	0%	0%	0%
Inspections	\$ 27,873	\$ 27,873	\$ 55,745	\$ 51,631	\$ 51,631	\$ 103,262	185%	185%	185%
Marketing	\$ 626,141	\$ 626,141	\$ 1,252,282	\$ 357,461	\$ 357,461	\$ 714,922	57%	57%	57%
M&E Studies	\$ 95,000	\$ 95,000	\$ 190,000	\$ 43,793	\$ 1,607	\$ 45,400	46%	2%	24%
Regulatory Compliance	\$ 153,277	\$ 153,277	\$ 306,554	\$ 92,354	\$ 92,354	\$ 184,709	60%	60%	60%
General Administration	\$ 945,738	\$ 945,738	\$ 1,891,476	\$ 747,683	\$ 749,832	\$ 1,497,515	79%	79%	79%
CPUC Energy Division	\$ 22,500	\$ 22,500	\$ 45,000	\$ 4,341	\$ 4,341	\$ 8,682	19%	19%	19%
TOTAL PROGRAM COSTS	\$ 12,263,374	\$ 9,452,633	\$ 21,716,006	\$ 7,526,399	\$ 13,520,407	\$ 21,046,806	0.61	1.43	97%
Funded Outside of LIEE Program Budget									
Indirect Costs				\$ 500,801	\$ 539,641	\$ 1,040,442			
NGAT Costs				\$ -	\$ 334,963	\$ 334,963			

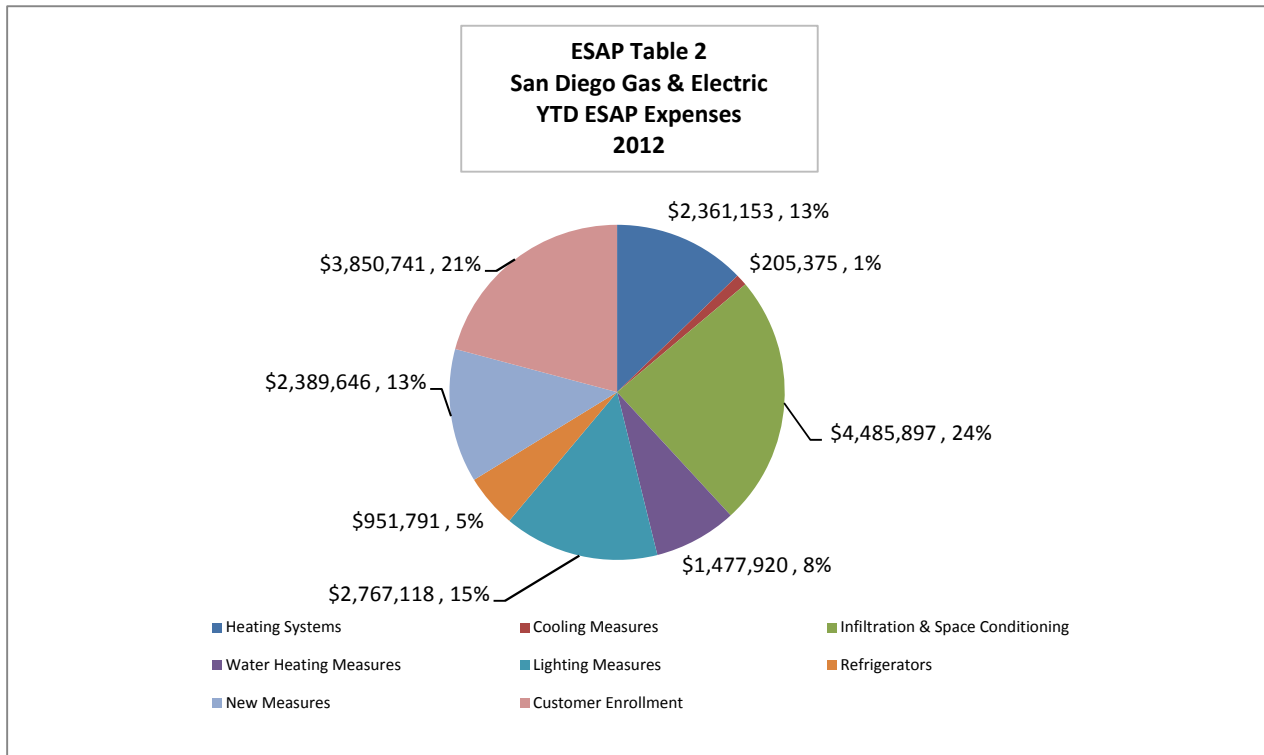
¹ The funding levels in the Authorized Budget columns do not reflect the total gas and electric unspent funds of \$7,910,908 at year end 2011 which were carried forward into 2012. D.08-11-031, as modified by D.10-10-008, and reaffirmed in D.12-08-044 authorized the IOUs to carry forward any unspent funds into the next year or program cycle to be used to fund ESA Program activities. In addition, the 2012 authorized budget does not reflect the fund shifting from the electric to the gas which was authorized by ALJ Ruling dated 12/20/2012 granting SDG&E's request to shift funds. ESA Program Table 19 depicts the funds that were shifted for 2012.

Bar Chart 1- Total Spent versus Authorized by Category



	A	B	C	D	E	F	G	H
	PY 2012 Energy Savings Assistance Program Annual Report Energy Savings Assistance Program Table 2 Energy Savings Assistance Program Expenses and Energy Savings by Measures Installed San Diego Gas & Electric Company							
1								
2				PY Completed & Expensed Installations				
3	Measures	Units	Quantity Installed	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses	% of Expenditure
4	Heating Systems							
5	Furnaces	Each	3,909	-	-	-	2,361,153	13%
6	Cooling Measures							
7	A/C Replacement - Room	Each	210	8,106	2.6	-	204,500	1%
8	A/C Replacement - Central	Each	-	-	-	-	-	0%
9	A/C Tune-up - Central	Each	7	1,789	-	-	875	0%
10	A/C Services - Central	Each	-	-	-	-	-	0%
11	Heat Pump	Each	-	-	-	-	-	0%
12	Evaporative Coolers	Each	-	-	-	-	-	0%
13	Evaporative Cooler Maintenance	Each	-	-	-	-	-	0%
14	Infiltration & Space Conditioning							
15	Envelope and Air Sealing Measures	Home	15,260	134,995	-	45,696	3,582,049	19%
16	Duct Test and Sealing	Home	634	-	-	-	100,150	1%
17	Attic Insulation	Home	754	8,565	7.1	6,418	803,698	4%
18	Water Heating Measures							
19	Water Heater Conservation Measures	Home	16,705	40,161	9.0	136,353	1,256,806	7%
20	Water Heater Replacement - Gas	Each	243	-	-	-	221,114	1%
21	Water Heater Replacement - Electric	Each	-	-	-	-	-	0%
22	Tankless Water Heater - Gas	Each	-	-	-	-	-	0%
23	Tankless Water Heater - Electric	Each	-	-	-	-	-	0%
24	Lighting Measures							
25	CFLs	Each	102,974	1,772,269	205.9	-	709,833	4%
26	Interior Hard wired CFL fixtures	Each	13,284	535,836	57.8	-	952,925	5%
27	Exterior Hard wired CFL fixtures	Each	4,259	200,982	-	-	225,309	1%
28	Torchiere	Each	9,201	1,757,391	184.0	-	879,051	5%
29	Refrigerators							
30	Refrigerators -Primary	Each	1,489	1,032,122	175.7	-	951,791	5%
31	Refrigerators - Secondary	Each	-	-	-	-	-	0%
32	Pool Pumps							
33	Pool Pumps	Each	-	-	-	-	-	0%
34	New Measures							
35	Forced Air Unit Standing Pilot Change Out	Each	170	-	-	7,179	50,660	0%
36	Furnace Clean and Tune	Each	6,071	-	-	-	398,278	2%
37	High Efficiency Clothes Washer	Each	1,631	45,673	-	57,239	1,023,691	6%
38	Microwave	Each	3,843	2,683,951	-	-	345,860	2%
39	Thermostatic Shower Valve	Each	6,676	107,331	-	58,439	375,965	2%
40	LED Night Lights	Each	61,967	633,303	-	-	195,193	1%
41	Occupancy Sensor	Each	-	-	-	-	-	0%
42	Smart Power Strips	Each	-	-	-	-	-	0%
43								
44								
45								
46								
47								
48	Pilots							
49	A/C Tune-up Central	Home	-	-	-	-	-	0%
50	Interior Hard wired CFL fixtures	Each	-	-	-	-	-	0%
51	Ceiling Fans	Each	-	-	-	-	-	0%
52	In-Home Display	Each	-	-	-	-	-	0%
53	Programmable Controllable Thermostat	Each	-	-	-	-	-	0%
54	Forced Air Unit	Each	-	-	-	-	-	0%
55	Microwave							
56	High Efficiency Clothes Washer							
57								
58	Customer Enrollment							
59	Outreach & Assessment	Home	23,448				3,370,312	18%
60	In-Home Education	Home	22,797				480,429	3%
61	Education Workshops	Participant						
62								
63								
64	Total Savings & Expenditures ²			8,962,474	642.2	311,324	18,489,641	100%
65								
66	Homes Weatherized	Home	16,324					
67								
68	Homes Treated							
69	- Single Family Homes Treated	Home	11,061					
70	- Multi-family Homes Treated	Home	10,009					
71	- Mobile Homes Treated	Home	1,345					
72	- Total Number of Homes Treated	Home	22,415					
73	# Eligible Homes to be Treated for PY ¹	Home	20,316					
74	% OF Homes Treated	%	110%					
75								
76	- Total Master-Metered Homes Treated	Home	140					
77								
78	¹ Based on Appendix F of D.12-08-044.							
79	² There are additional expenditures of \$2,674.36 for CFL bulbs, and ballasts that were directly purchased and installed by SDG&E's ESA Field Specialists in customer homes that were served by SDG&E's ESA Program.							

PIE CHART 1- Expenses by Measures Category For 2012



PY 2012 Energy Savings Assistance Program Annual Report
Energy Savings Assistance Program Table 3
Energy Savings Assistance Program COST-EFFECTIVENESS
San Diego Gas & Electric Company

	PY - Recorded ¹					
	Ratio of Benefits Over Costs			Net Benefits; \$ Millions		
Program Year	Utility Cost Test	Total Resource Cost Test	Modified Participant Test	Utility Cost Test	Total Resource Cost Test	Modified Participant Test
2012	0.68	0.53	0.86	\$ (6,858,625)	\$ (10,037,753)	\$ (2,953,674)
2011	0.45	0.33	0.90	(11,090,027)	(13,403,509)	(2,139,522)
2010	0.50	0.38	0.95	(9,449,217)	(11,642,291)	(1,079,270)
2009	0.54	0.42	0.83	(7,204,451)	(9,201,740)	(2,809,076)
2008	0.64	0.52	0.77	(6,120,166)	(8,121,185)	(4,070,011)
2007	0.41	0.32	0.62	(7,781,493)	(8,954,377)	(4,866,416)
2006	0.33	0.54	0.61	(9,883,548)	(6,602,546)	(5,837,643)
2005	0.45	0.7	0.99	(7,115,009)	(3,896,685)	(66,902)
2004	0.47	0.73	1.07	(7,584,889)	(3,905,982)	938,847

¹Source of Data

	A	B	C	D	E
1	PY 2012 Energy Savings Assistance Program Annual Report Energy Savings Assistance Program Table 4 Energy Savings Assistance Program PENETRATION San Diego Gas & Electric Company				
2					
3	Customer	Housing Type	# Homes Treated	Current Year Penetration Rate for Homes Treated	
4	Gas and Electric Customers				
5	Owners - Total		6,283		
6		Single Family	4,578		
7		Multi Family	427		
8		Mobile Homes	1,278		
9	Renters - Total		15,276		
10		Single Family	6,006		
11		Multi Family	9,215		
12		Mobile Homes	55		
13	Electric Customers (only)				
14	Owners - Total		275		
15		Single Family	235		
16		Multi Family	29		
17		Mobile Homes	11		
18	Renters - Total		581		
19		Single Family	242		
20		Multi Family	338		
21		Mobile Homes	1		
22	Gas Customers (only)				
23	Owners - Total		-		
24		Single Family			
25		Multi Family			
26		Mobile Homes			
27	Renters - Total		-		
28		Single Family			
29		Multi Family			
30		Mobile Homes			
31					
32	Total Homes Treated in PY		22,415		
33	Total Homes Eligible in PY¹		20,316		110%
34					
35	¹ Based on Appendix F of D.12-08-044.				
36					
37	Penetration History				
38	Year²	Homes Treated	Ineligible & Unwilling³	Estimated Eligible in Current Year	Current Year Penetration Rate for Homes Treated
39	2002	14,089	-		
40	2003	15,706	-		
41	2004	14,897	-		
42	2005	11,254	-		
43	2006	13,771	-		
44	2007	13,074	-		
45	2008	20,804	-		
46	2009	20,927	6,685		
47	2010	21,593	8,690		
48	2011	22,575	8,423		
49	2012	22,415	7,871	20,316	110.33%
50	2013				
51	2014				
52	2015				
53	2016				
54	2017				
55	2018				
56	2019				
57	2020				
58	Total Homes Treated since 2002	191,105	31,669		
59					
60	² Homes treated since 2002 are reported to track progress toward meeting the 2020 Programmatic Initiative				
61	³ Includes refused, over income and customers unable to provide income documentation. SDG&E began tracking ineligible and unwilling in 2009.				
62					
63					
64					
65	Year	Utility in Shared Service Territory	Eligible Households in Shared Service Territory	Eligible households treated by both utilities in shared service territory	
66	2012	SCG	17,087	140	
67					
68					

PY2012 Energy Savings Assistance Program Annual Report
Energy Savings Assistance Program Table 5
Energy Savings Assistance Program Direct Purchases & Installation Contractors
San Diego Gas & Electric Company

Contractor	County ¹	Contractor Type (Check one or more if applicable)				PY Annual Expenditures
		Private	CBO	WMDVBE	LIHEAP	
AMERICAN INSULATION INC	San Diego	x		x		\$ 2,142,834
AMERIMEX	San Diego	x		x		\$ 215,526
CAL-WEST AIR CONDITIONING INC	San Diego	x				\$ 602,261
CAMPESINOS UNIDOS INC	San Diego		x	x	x	\$ 576,817
CAPITAL STATE CONTRUCTION	San Diego	x				\$ 1,753,453
EAGLE SYSTEMS INTERNATIONAL INC	San Diego					\$ 790,818
JERRY'S HEATING & AIR CONDITIONING, INC	San Diego	x				\$ 935,127
JJ HEAT & AIR	San Diego	x				\$ -
MAAC PROJECT	San Diego		x	x	x	\$ 979,028
R&B WHOLESALE DISTRIBUTOR INC	San Diego	x				\$ 1,996,117
RANCHO ENERGY SERVICES	San Diego	x		x		\$ 2,330,015
RELIABLE ENERGY MANAGEMENT INC	San Diego			x		\$ 85,973
RICHARD HEATH & ASSOCIATES INC	San Diego, Orange	x		x		\$ 5,215,403
THA HEATING AND AIR CONDITIONING INC	San Diego	x				\$ 738,475
TOWN & COUNTRY PROPERTY	San Diego			x		\$ 127,794
Total Contractor Expenditures						\$ 18,489,641

¹ Counties where contractor provides services.

|

		A		B		C		D		E		F		G		H		I		J		K		L		M		N		O		P		Q		R		S	
1		PY2012 Energy Savings Assistance Program Annual Report Energy Savings Assistance Program Table 6 Energy Savings Assistance Program Installation Cost of Program Installation Contractors San Diego Gas & Electric Company																																					
2			Unit of Measure	CBO/WMDVBE						Non-CBO/WMDVBE						2012 Program Total																							
3				Installations		Dwellings		Costs		Installations		Dwellings		Costs		Units Installed	Households	Costs	Cost/ Unit	Cost/ Household																			
4				Units	%	Units	%	\$	%	Units	%	Units	%	\$	%																								
5	Dwellings	Each	1,058,141	81%	21,586	94%	11,678,558	63%	242,541	19%	1,432	6%	6,811,083	37%	1,300,682	23,018	18,489,641	14.22	803.27																				
6																																							
7	Heating Systems																																						
8	Furnaces	Each	2,674	68%	2,653	68%	446,320	19%	1,235	32%	1,224	32%	1,914,834	81%	3,909	3,877	2,361,153	604	609																				
9	Cooling Measures																																						
10	A/C Replacement - Room	Each	210	100%	202	100%	204,500	100%	-	0%	-	0%	-	0%	210	202	204,500	973.81	1,012.38																				
11	A/C Replacement - Central	Each	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-																				
12	A/C Tune-up - Central	Each	-	0%	-	0%	-	0%	7	100%	7	100%	875	100%	7	7	875	125.00	125.00																				
13	A/C Services - Central	Each	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-																				
14	Heat Pump	Each	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-																				
15	Evaporative Coolers	Each	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-																				
16	Evaporative Cooler Maintenance	Each	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-																				
17	Infiltration & Space Conditioning																																						
18	Envelope and Air Sealing Measures	Home	108,206	72%	10,378	68%	2,564,297	72%	41,574	28%	4,882	32%	1,017,751	28%	149,780	15,260	3,582,049	23.92	234.73																				
19	Duct Test and Sealing	Home	503	79%	503	79%	46,175	46%	131	21%	131	21%	53,975	54%	634	634	100,150	157.97	157.97																				
20	Attic Insulation	Home	679,217	82%	626	83%	653,397	81%	151,148	18%	128	17%	150,301	19%	830,365	754	803,698	0.97	1,065.91																				
21	Water Heating Measures																																						
22	Water Heater Conservation Measures	Home	42,214	73%	11,408	70%	916,438	73%	15,938	27%	4,783	30%	340,368	27%	58,152	16,191	1,256,806	21.61	77.62																				
23	Water Heater Replacement - Gas	Each	20	8%	20	8%	16,231	7%	225	92%	225	92%	204,884	93%	245	245	221,114	902.51	902.51																				
24	Water Heater Replacement - Electric	Each	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-																				
25	Tankless Water Heater - Gas	Each	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-																				
26	Tankless Water Heater - Electric	Each	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-																				
27	Lighting Measures																																						
28	CFLs	Each	92,017	89%	15,435	91%	634,249	89%	10,957	11%	1,611	9%	75,584	11%	102,974	17,046	709,833	6.89	41.64																				
29	Interior Hard wired CFL fixtures	Each	8,901	67%	3,710	68%	650,642	68%	4,383	33%	1,735	32%	302,283	32%	13,284	5,445	952,925	71.73	175.01																				
30	Exterior Hard wired CFL fixtures	Each	3,323	78%	2,163	76%	175,787	78%	936	22%	666	24%	49,522	22%	4,259	2,829	225,309	52.90	79.64																				
31	Torchiere	Each	7,364	80%	4,978	79%	705,916	80%	1,837	20%	1,332	21%	173,135	20%	9,201	6,310	879,051	95.54	139.31																				
32	Refrigerators																																						
33	Refrigerators -Primary	Each	(9)	-1%	(9)	-1%	(5,650)	-1%	1,498	101%	1,498	101%	957,441	101%	1,489	1,489	951,791	639.21	639.21																				
34	Refrigerators - Secondary	Each	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-																				
35	Pool Pumps																																						
36	Pool Pumps	Each	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-																				
37	New Measures																																						
38	Forced Air Unit Standing Pilot Change Out	Each	103	61%	103	61%	29,254	58%	67	39%	67	39%	21,406	42%	170	170	50,660	298.00	298.00																				
39	Furnace Clean and Tune	Each	4,863	80%	4,707	79%	330,628	83%	1,208	20%	1,214	21%	67,650	17%	6,071	5,921	398,278	65.60	67.27																				
40	High Efficiency Clothes Washer	Each	(22)	-1%	(22)	-1%	(13,805)	-1%	1,653	101%	1,653	101%	1,037,496	101%	1,631	1,631	1,023,691	627.65	627.65																				
41	Microwave	Each	2,876	75%	2,876	75%	258,830	75%	967	25%	967	25%	87,030	25%	3,843	3,843	345,860	90.00	90.00																				
42	Thermostatic Shower Valve	Each	3,398	51%	2,331	51%	197,158	52%	3,278	49%	2,237	49%	178,807	48%	6,676	4,568	375,965	56.32	82.30																				
43	LED Night Lights	Each	59,274	96%	20,481	94%	186,715	96%	2,693	4%	1,356	6%	8,478	4%	61,967	21,837	195,193	3.15	8.94																				
44	Occupancy Sensor	Each	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-																				
45	Smart Power Strips	Each	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-																				
46																																							
47																																							
48																																							
49																																							
50																																							
51	Pilots																																						
52	A/C Tune-up Central	Home																																					
53	Interior Hard wired CFL fixtures	Each																																					
54	Ceiling Fans	Each																																					
55	In-Home Display	Each																																					
56	Programmable Controllable Thermostat	Each																																					
57	Forced Air Unit	Each																																					
58	Microwave																																						
59	High Efficiency Clothes Washer																																						
60																																							
61	Customer Enrollment																																						
62	Outreach & Assessment	Home	21,586	94%	21,586	94%	3,228,488	96%	1,432	6%	1,432	6%	141,824	4%	23,018	23,018	3,370,312	146.42	146.42																				
63	In-Home Education	Home	21,423	94%	21,423	94%	452,989	94%	1,374	6%	1,374	6%	27,440	6%	22,797	22,797	480,429	21.07	21.07																				
64	Education Workshops	Participant	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-																				
65																																							
66																																							

PY 2012 Energy Savings Assistance Program Annual Report
Energy Savings Assistance Program Table 7
Expenditures by Cost Elements
San Diego Gas & Electric Company

	2012 Expenditures Recorded by Cost Element			
Energy Savings Assistance Program:	Labor¹	Non-Labor²	Contract³	Total
Energy Efficiency				
- Gas Appliances	\$ -	\$ -	\$ 4,201,557	\$ 4,201,557
- Electric Appliances	\$ -	\$ 1,327	\$ 4,301,629	\$ 4,302,956
- Weatherization	\$ -	\$ (269)	\$ 6,135,714	\$ 6,135,445
- Outreach and Assessment	\$ -	\$ -	\$ 3,370,312	\$ 3,370,312
- In Home Energy Education	\$ -	\$ 1,616	\$ 480,429	\$ 482,045
- Education Workshops	\$ -	\$ -	\$ -	\$ -
- Pilot	\$ -	\$ -	\$ -	\$ -
Energy Efficiency TOTAL	\$ -	\$ 2,674	\$ 18,489,641	\$ 18,492,315
Training Center	\$ -	\$ -	\$ -	\$ -
Inspections	\$ 102,621	\$ 642	\$ -	\$ 103,262
Marketing	\$ -	\$ 714,922	\$ -	\$ 714,922
M&E Studies	\$ -	\$ 45,400	\$ -	\$ 45,400
Regulatory Compliance	\$ 150,004	\$ 34,704	\$ -	\$ 184,709
General Administration	\$ 1,233,445	\$ 264,070	\$ -	\$ 1,497,515
CPUC Energy Division	\$ -	\$ 8,682	\$ -	\$ 8,682
TOTAL PROGRAM COSTS	\$ 1,486,070	\$ 1,071,095	\$ 18,489,641	\$ 21,046,806

¹Define Labor: Utility staff labor including labor indirects (vacation and sick leave, payroll taxes, and affiliate labor indirects).

²Define Non-Labor: All other non-labor costs excluding contractor costs defined below.

³Define Contractor: Expenses associated with contractor installations, Weatherization, Outreach and Assessment, and In-Home Energy Education services.

[illegible]

	A	B	C	D	E	F
1	PY 2012 Energy Savings Assistance Program Annual Report Energy Savings Assistance Program Table 9 Life Cycle Bill Savings by Measure San Diego Gas & Electric Company					
2	Measure Description	PY Number Installed	Per Measure Electric Impact - Average (kWh)	Per Measure Gas Impact (Therms)	Effective Useful Life (EUL)	2012 Total Measure Life Cycle Bill Savings
3						
4	Heating Systems					
5	Furnaces	3,909	-	-	13	-
6	Cooling Measures					
7	A/C Replacement - Room	210	39	-	15	9,556
8	A/C Replacement - Central				-	
9	A/C Tune-up - Central	7	256	-	10	1,566
10	A/C Services - Central				-	
11	Heat Pump				-	
12	Evaporative Coolers				-	
13	Evaporative Cooler Maintenance				-	
14	Infiltration & Space Conditioning					
15	Envelope and Air Sealing Measures	15,260	23	4	5	154,072
16	Duct Sealing	634	-	-	25	-
17	Attic Insulation	754	57	9	25	57,179
18	Water Heating Measures					
19	Water Heater Conservation Measures	16,705	58	10	8	623,752
20	Water Heater Replacement - Gas	243	-	-	13	-
21	Water Heater Replacement - Electric				-	
22	Tankless Water Heater - Gas				-	
23	Tankless Water Heater - Electric				-	
24	Lighting Measures					
25	CFLs	102,974	16	-	9	1,315,403
26	Interior Hard wired CFL fixtures	13,284	40	-	16	658,544
27	Exterior Hard wired CFL fixtures	4,259	47	-	-	284,031
28	Torchiere	9,201	191	-	9	1,416,505
29	Refrigerators					
30	Refrigerators -Primary	1,489	693	-	15	1,214,862
31	Refrigerators - Secondary				-	
32	Pool Pumps					
33	Pool Pumps				-	
34	New Measures					
35	Forced Air Unit Standing Pilot Change Out	170	-	42	18	47,324
36	Furnace Clean and Tune	6,071	-	-	13	-
37	High Efficiency Clothes Washer	1,631	550	37	14	372,524
38	Microwave	3,843	698	-	15	3,159,153
39	Thermostatic Shower Valve	6,676	399	14	10	500,578
40	LED Night Lights	61,967	10	-	9	510,459
41	Occupancy Sensor					
42	Smart Power Strips					
43						
44						
45						
46	Pilots					
47	A/C Tune-up Central					
48	Interior Hard wired CFL fixtures					
49	Ceiling Fans					
50	In-Home Display					
51	Programmable Controllable Thermostat					
52	Forced Air Unit					
53	Microwave					
54	High Efficiency Clothes Washer					
55						
56	Total Homes Served By the Program					22,415
57	Life Cycle Bill Savings Per Home					\$460.65

	A	B	C
1	PY2012 Energy Savings Assistance Program Annual Report Energy Savings Assistance Program Table 10 Energy Rate Used for Bill Savings Calculations San Diego Gas & Electric Company		
2	Year	\$/kWh [1]	\$/Therm
3	2012	0.1081	0.5362
4	2013	0.1114	0.5523
5	2014	0.1147	0.5689
6	2015	0.1181	0.5860
7	2016	0.1217	0.6035
8	2017	0.1253	0.6217
9	2018	0.1291	0.6403
10	2019	0.1330	0.6595
11	2020	0.1370	0.6793
12	2021	0.1411	0.6997
13	2022	0.1453	0.7207
14	2023	0.1497	0.7423
15	2024	0.1541	0.7646
16	2025	0.1588	0.7875
17	2026	0.1635	0.8111
18	2027	0.1684	0.8355
19	2028	0.1735	0.8605
20	2029	0.1787	0.8863
21	2030	0.1841	0.9129
22	2031	0.1896	0.9403
23	2032	0.1953	0.9685
24	2033	0.2011	0.9976
25	2034	0.2072	1.0275
26	2035	0.2134	1.0583
27	2036	0.2198	1.0901
28	^[1] - for 2012 average cost per kWh paid by participants. Cost is escalated 3% annually in 24 subsequent years		
29			
30			

	A	B	C	D	E
1	PY2012 Energy Savings Assistance Program Annual Report Energy Savings Assistance Program Table 11 Bill Savings Calculations by Program Year San Diego Gas & Electric Company				
2	Program Year	Program Costs	Program Lifecycle Bill Savings	Program Bill Savings/ Cost Ratio	Per Home Average Lifecycle Bill Savings
3	2009	\$ 16,200,403	\$ 9,105,659	0.56	\$ 435
4	2010	\$ 18,890,522	\$ 11,227,334	0.59	\$ 520
5	2011	\$ 20,950,509	\$ 11,372,235	0.54	\$ 504
6	2012 ^[1]	\$ 21,046,806	\$ 10,325,509	0.49	\$ 461
7					
8					
9					
	^[1] - report activity for the 3 prior years				

	A	B	C	D	E	F
1	PY 2012 Energy Savings Assistance Program Annual Report Energy Savings Assistance Program Table 12 Whole Neighborhood Approach San Diego Gas & Electric Company					
2						
3						
4						
5	A	B	C	D	E	F=(D+E)/C
6	Neighborhood (County, Zipcode, Zip+7 etc.)	Total Residential Customers	Total Estimated Eligible	Total Treated 2002-2011	Total Treated This Year	Penetration Rate
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						
17						
18						
19						
20						
21						
22						
23						
24						
25						
26						
27						
28						
29						

	A	B
1	PY2012 Energy Savings Assistance Program Annual Report Energy Savings Assistance Program Table 13 Categorical Enrollment San Diego Gas & Electric Company	
2		
3		
4		
5		
6	Type of Enrollment	Number of customers enrolled
7	Standard Enrollment	6,132
8	Categorical Eligibility	3,929
9	Self-Certification	12,354
10	Other (please list)	-
11	Total number of customers enrolled	22,415

	A	B	C	D	E	F	G	H	I
1	PY 2012 Energy Savings Assistance Program Annual Report Energy Savings Assistance ProgramTable 14 Leveraging San Diego Gas & Electric Company								
2	Partner	Relationship outside the IOU?	MOU Present?	Amount of Dollars Saved [1]	Amount of Energy Savings [2]	Other Measureable Benefits [2]	Enrollments Resulting from Leveraging Effort [3]	Meets all Criteria	If not, Explain
3	No enrollments resulted in leveraging activity	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
4									
5									
6									
7									
8									
9									
10									
11									
12									
13									
14									
15									
16									
17									
18	[1] Dollars saved. Leveraging efforts are measurable and quantifiable in terms of dollars saved by the IOU (Shared/contributed/donated resources, elimination of redundant processes, shared/contributed								
19	[2] Energy savings/benefits. Leveraging efforts are measurable and quantifiable in terms of home energy benefits/ savings to the eligible households.								
20	[3] Enrollment increases. Leveraging efforts are measurable and quantifiable in terms of program enrollment increases and/or customers served.								
21	N/A = Not Applicable								

	A	B	C	D	E	F
1	PY 2012 Energy Savings Assistance Program Annual Report					
2	Energy Savings Assistance Program Table 15					
3	Integration					
4	San Diego Gas & Electric Company					
5						
6	Integration Efforts					
7	Coordination Type	New Integration Efforts in PY 2012	Results			
8			Cost and/or Resource Savings			
9	Interdepartmental, Program Coordination, Data Sharing, ME&O, etc.	[Brief description of effort]	Estimated \$ Savings	Methodology [1]	Other Results	
10	Interdepartmental	Lead Sharing between ESA Program and MIDI Program	None. Too few enrollments to overcome administrative cost	ESA Program over income leads are given to MIDI program, and MIDI Program Leads with lower income levels are given to the ESA Program.	MIDI Program Leads produced 11 ESA Program enrollments.	
11	Program Coordination	Worked with California Solar Initiative (CSI)	None.	Expedited homes treated in order for customers to participate in CSI programs	None	
12	Interdepartmental	CARE/Energy Savings Assistance Program combined message in all marketing material	None.	No dollar impact. Integration effort was designated to increase awareness.	None	
13	Interdepartmental	CARE/Energy Savings Assistance Program combined message to be included in general energy efficiency collateral as appropriate	None.	No dollar impact. Integration effort was designated to increase awareness.	None	
14	Data Sharing	Marketing to customers enrolled in CARE and/or Medical Baseline	None.	No dollar impact. Effort provided targeted lead generation.	None	
15						
16						
17						
18						
19						
20						
21						
22	[1] Integration efforts are measurable and quantifiable in terms of dollars saved by the IOU (Shared resources, shared marketing materials, shared					
23	information technology, shared programmatic infrastructure, among others are just some examples of cost and/or resource savings to the IOU). In					
24	footnotes, provide information on methodology used to calculate cost and/or resource savings.					
25						

	A	B	C	D	E	F
1	PY 2012 Energy Savings Assistance Program Energy Savings Assistance Program Table 16 Lighting San Diego Gas & Electric Company					
2						
3						
4						
5	Energy Savings Assistance Program CFL Tracking Table 1¹					
6	<i>Instructions: Please identify the CFL bulbs used within your program and fill in the remaining columns for each</i>					
7	Bulb Name / Identification	Bulb Description (wattage, lumens)	Bulb Cost (material)	Admin Cost (overhead, contractor fee, marketing, etc.)	Total Bulb Cost (material + admin)	AB 1109 Compliant?²
8	CFL Bulb	14 Watt	5.00	1.90	6.90	Yes
9	CFL Bulb	15 Watt	5.00	1.90	6.90	Yes
10	CFL Bulb	19 Watt	5.00	1.90	6.90	Yes
11	CFL Bulb	20 Watt	5.00	1.90	6.90	Yes
12	CFL Bulb	23 Watt	5.00	1.90	6.90	Yes
13						
14	1) Established through Section 9.3.4, D. 08-11-031 2) Compliant in regards to: 1) Do bulbs meet or exceed CEC energy efficiency standards for general purpose lighting? 2) Do all models comply with Europe's RoHS standards on toxicity?					
15						
16						
17						
18						
19						
20						
21						
22						
23						
24						
25	Year	Number of Homes Treated in LIEE Program	Number of Homes Provided CFLs	Avg. # of CFL bulbs given per home	Est. total energy savings from installed CFLs	
26						
27	2009	20,927	17,653	6	1,796,496	
28	2010	21,593	21,593	7	1,772,896	
29	2011	22,575	17,246	6	1,697,568	
30	2012	22,415	17,046	6	1,772,269	

PY 2012 Energy Savings Assistance Program Annual Report
Energy Savings Assistance Program Table 17
Studies & Pilots Status
San Diego Gas & Electric Company

	PY Authorized Budget				PY Actual Expenses				% of Budget Spent	% of Project Completed	On Schedule?	Energy Savings Measured
	2012	2013	2014	Total	2012 [3]	2013	2014	Total				
Studies [1][3]												
Energy Education Assessment Study	\$ 15,000	\$ 15,000	\$ 15,000	\$ 45,000	\$ -			\$ -	0%	0%	Yes	Not Applicable
Impact Evaluation of the 2012 ESA Program	\$ 30,000	\$ 30,000	\$ 30,000	\$ 90,000	\$ -			\$ -	0%	0%	Yes	Not Applicable
Needs Assessment	\$ 35,000	\$ 35,000	\$ 35,000	\$ 105,000	\$ -			\$ -	0%	0%	Yes	Not Applicable
Multifamily Consultant Study	\$ 20,000	\$ 20,000	\$ 20,000	\$ 60,000	\$ -			\$ -	0%	0%	Yes	Not Applicable
Pilots [2]												

[1] All Studies were authorized in D.12-08-044 for the 2012-2014 ESA Program cycle.

[2] No Pilots were requested or directed in D.12-08-044 for the 2012-2014 ESA Program cycle.

[3] Since D.12-08-044 was issued late in 2012, these studies were in the Request for Proposal (RFP) process at the end of 2012. There were no invoices billed or paid in 2012.

PY 2012 Energy Savings Assistance Program Annual Report
Energy Savings Assistance Program Table 18
"Add Back" Measures
San Diego Gas & Electric Company

Measure	Fuel	House Type	Climate Zone	Ratio of Benefits Over Costs			Quantity Installed	Budget Impact of "add Back" ¹	First Year Energy Bill Savings Impact
				Utility Cost Test	Modified Participant Test	Total Resource Cost Test			
Duct Test & Seal	Gas	MH	7	0.00	0.00	0.00	4	\$ 3,200	\$ -
Duct Test & Seal	Gas	MH	10	0.00	0.00	0.00	12	\$ 8,800	\$ -
Duct Test & Seal	Gas	SF	7	0.00	0.00	0.00	236	\$ 33,666	\$ -
Duct Test & Seal	Gas	SF	10	0.00	0.00	0.00	301	\$ 53,959	\$ -
Furnace repair / replace	Gas	MH	7	0.00	0.00	0.00	555	\$ 789,281	\$ -
Furnace repair / replace	Gas	MH	10	0.00	0.00	0.00	946	\$ 909,379	\$ -
Furnace repair / replace	Gas	MH	14	n/a	n/a	n/a	0	\$ -	\$ -
Furnace repair / replace	Gas	MH	15	n/a	n/a	n/a	0	\$ -	\$ -
Furnace repair / replace	Gas	MF	7	0.00	0.00	0.00	408	\$ 25,797	\$ -
Furnace repair / replace	Gas	MF	10	0.00	0.00	0.00	657	\$ 32,122	\$ -
Furnace repair / replace	Gas	MF	14	n/a	n/a	n/a	0	\$ -	\$ -
Furnace repair / replace	Gas	MF	15	n/a	n/a	n/a	0	\$ -	\$ -
Furnace repair / replace	Gas	SF	7	0.00	0.00	0.00	3,732	\$ 789,281	\$ -
Furnace repair / replace	Gas	SF	10	0.00	0.00	0.00	4,220	\$ 909,379	\$ -
Furnace repair / replace	Gas	SF	14	n/a	n/a	n/a	0	\$ -	\$ -
Furnace repair / replace	Gas	SF	15	n/a	n/a	n/a	0	\$ -	\$ -
Room AC	Elec	SF	10	0.13	0.15	0.12	51	\$ 46,609	\$ 2,321
Room AC	Elec	MH	10	n/a	n/a	n/a	0	\$ -	\$ -
Room AC	Elec	MF	10	0.12	0.14	0.11	159	\$ 157,891	\$ 7,235
Water heater repair / replace	Gas	All	all	0.00	0.00	0.00	243	\$ 221,114	\$ -

¹ Dollars spent on these Add Back Measures

PY 2012 Energy Savings Assistance Program Annual Report
Energy Savings Assistance Program Table 19
Energy Savings Assistance Program Fund Shifting
San Diego Gas & Electric Company

Program Year 2012	Total Authorized	Total Shifted ^{1,2}	% of Authorized Total	Carried Forward/Carried Back	To/From Year		Advice Letter Number
Energy Savings Assistance Program :	<i>ex. \$x,xxx,xx</i>	<i>(\$x,xxx)</i>	<i>x%</i>	Carried Forward	From 2008	From In-Home Energy Education	G-xxxx
Energy Efficiency							
- Gas Appliances	\$ 2,626,325	\$ 1,799,318	8.3%	2012 Authorized	From 2012	From 2012 Authorized Electric Appliances funds shifted to Gas Appliances \$1,799,318.	Approved per ALJ Ruling dated 12/20/2012 granting SDG&E authority to shift funds.
- Electric Appliances	\$ 7,361,534	\$ (1,799,318)	-8.3%	2012 Authorized	From 2012	To 2012 Authorized Gas Appliances (\$1,799,318)	Approved per ALJ Ruling dated 12/20/2012 granting SDG&E authority to shift funds.
- Weatherization	\$ 4,781,622	\$ 1,353,823	6.2%	[1] 2012 Authorized [2] Carried Forward	[1] From 2012 Wx Electric to 2012 Wx Gas [2] From 2011	[1] From 2012 Authorized Weatherization electric funding (1,428,577) shifted to 2012 Authorized Weatherization gas funding \$1,428,577. (- \$1,428,577 + \$1,428,577 = \$0). [2] From 2011 unspent gas funds carried forward \$1,353,823.	[1] Approved per ALJ Ruling dated 12/20/2012 granting SDG&E authority to shift funds. [2] Authorized by D.08-11-031, as modified by D.10-10-008, and reaffirmed in D.12-08-044.
- Outreach and Assessment	\$ 2,799,492	\$ 570,820	2.6%	Carried Forward	From 2011	From 2011 unspent electric and gas funds carried forward totalling \$570,820. (\$285,410 electric funds + \$285,410 gas funds = \$570,820)	Authorized by D.08-11-031, as modified by D.10-10-008, and reaffirmed in D.12-08-044.
- In Home Energy Education	\$ 405,976	\$ 76,068	0.4%	Carried Forward	From 2011	From 2011 unspent electric and gas funds totalling \$76,068. (\$38,034 electric funds + \$38,034 gas funds = \$76,068)	Authorized by D.08-11-031, as modified by D.10-10-008, and reaffirmed in D.12-08-044.
- Education Workshops							
- Pilot							
Energy Efficiency TOTAL	\$ 17,974,949	\$ 2,000,711					
Training Center	\$ -						
Inspections	\$ 55,745	\$ 47,518	0.2%	Carried Forward	From 2011	From 2011 unspent electric and gas funds carried forward totalling \$47,518. (\$23,759 electric funds + \$23,759 gas funds = \$47,518)	Authorized by D.08-11-031, as modified by D.10-10-008, and reaffirmed in D.12-08-044.
Marketing	\$ 1,252,282						
M&E Studies	\$ 190,000						
Regulatory Compliance	\$ 306,554						
General Administration	\$ 1,891,476						
CPUC Energy Division	\$ 45,000						
TOTAL PROGRAM COSTS	\$ 21,716,006	\$ 2,048,229					

1) Numbers reported in standard accounting format, with negative amounts displayed in parentheses (\$xxx.xx).

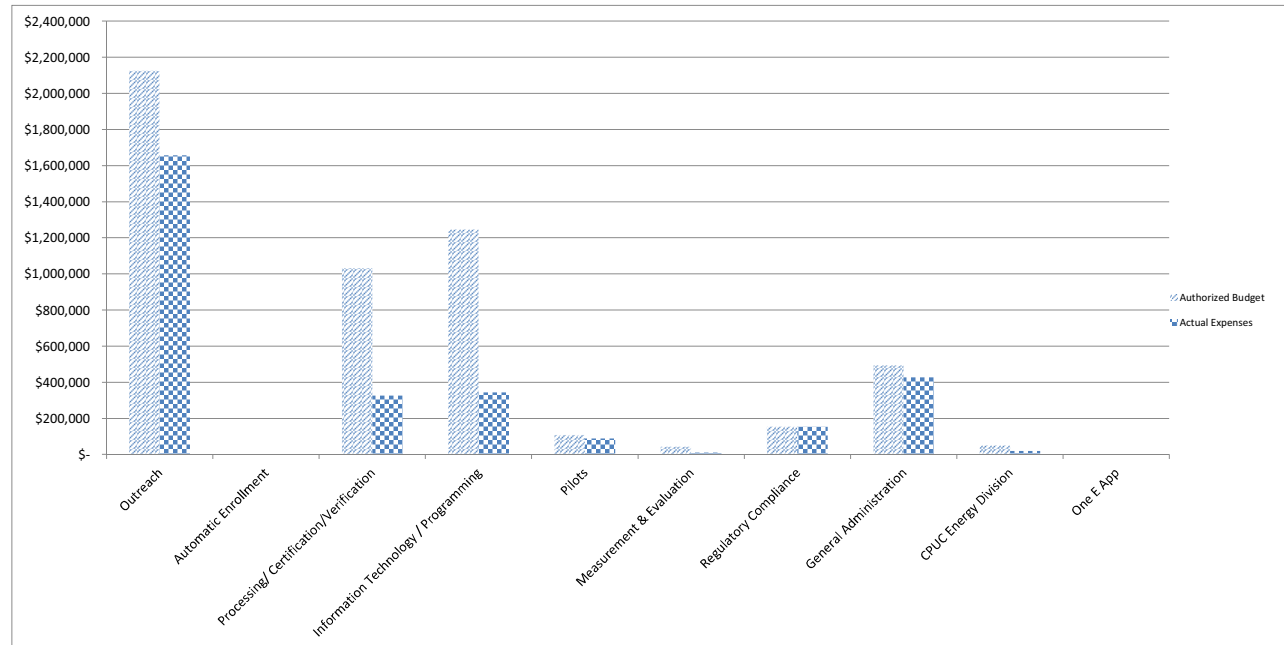
2) In order for the ESA Program to continue to meet the Commission's directive to install all feasible measures during the 2012-2014 program cycle, SDG&E requested and the Commission granted its request to shift \$9,398,216

2012 CARE Annual Report
CARE Table 1 - Overall Program Expenses
San Diego Gas & Electric Company

Standardized CARE Administrative Cost Reporting Categories 2012 Costs by Energy Source							
Category	Residential		Expanded*		Total	Authorized Budget	% Budget Spent
	Electric	Gas	Electric	Gas			
Outreach	\$1,339,795	\$317,327	\$0	\$0	\$1,657,122	\$2,125,410	78%
Automatic Enrollment	\$0	\$0	\$0	\$0	\$0	\$0	0%
Processing/ Certification/Verification	\$262,622	\$64,233	\$0	\$0	\$326,855	\$1,032,415	32%
Information Technology / Programming	\$277,527	\$66,140	\$0	\$0	\$343,667	\$1,245,390	28%
Pilots	\$72,302	\$16,571	\$0	\$0	\$88,873	\$108,000	82%
Measurement & Evaluation	\$9,153	\$2,279	\$0	\$0	\$11,432	\$42,500	27%
Regulatory Compliance	\$124,129	\$30,525	\$0	\$0	\$154,654	\$154,917	100%
General Administration	\$344,072	\$83,958	\$0	\$0	\$428,030	\$492,559	87%
CPUC Energy Division	\$16,057	\$4,202	\$0	\$0	\$20,259	\$49,535	41%
One E App	\$0	\$0	\$0	\$0	\$0	\$0	0%
TOTAL Program Costs	\$2,445,657	\$585,235	\$0	\$0	\$3,030,892	\$5,250,726	58%
CARE Rate Discount	\$52,802,039	\$11,092,121	\$0	\$0	\$63,894,160	\$73,857,625	87%
Service Establishment Charge Discount	\$0	\$0	\$0	\$0	\$0	\$0	0%
TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	\$55,247,696	\$11,677,356	\$0	\$0	\$66,925,052	\$79,108,351	85%

*Due to the immaterial dollar amount, SDG&E does not track the CARE Expansion Program's cost separately from the Residential CARE Program costs.

Bar Chart 1 - Total Authorized Budget vs. Actual Expenses by Category



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	2012 CARE Annual Report																	
2	CARE Table 2 - Enrollment, Recertification, Attrition, & Penetration																	
3	San Diego Gas & Electric Company																	
4																		
5		Gross Enrollment										Attrition (Drop Offs)	Enrollment		Total CARE Participants	Estimated CARE Eligible	Penetration Rate % (P/Q)	
6		Automatic Enrollment					Capitation	Other Sources ⁵	Total (G+H+I)	Recertification	Total Adjusted (J+K)		Net (L-M)	Net Adjusted (N-K)				
7		Inter- Utility ¹	Intra- Utility ²	Leveraging ³	One-e-App ⁴	SB580												Combined (B+C+D+E+F)
8	2012																	
9	January	0	83	0	0	0	83	79	4,706	4,868	5,327	10,195	4,968	5,227	-100	308,496	362,325	85.1%
10	February	0	915	0	0	0	915	212	4,137	5,264	3,664	8,928	5,503	3,425	-239	308,257	362,325	85.1%
11	March	0	367	0	0	0	367	257	5,344	5,968	4,631	10,599	4,600	5,999	1,368	309,625	362,325	85.5%
12	April	439	252	0	0	0	691	250	5,365	6,306	4,006	10,312	4,821	5,491	1,485	311,110	363,133	85.7%
13	May	0	205	0	0	0	205	216	5,501	5,922	2,333	8,255	5,533	2,722	389	311,499	363,133	85.8%
14	June	0	418	0	0	0	418	132	3,945	4,495	1,285	5,780	4,389	1,391	106	311,605	363,133	85.8%
15	July	0	245	68	0	0	313	152	4,454	4,919	3,676	8,595	4,423	4,172	496	312,101	363,967	85.7%
16	August	0	237	1	0	0	238	193	5,831	6,262	5,912	12,174	5,157	7,017	1,105	313,206	363,967	86.1%
17	September	0	388	0	0	0	388	198	5,035	5,621	5,508	11,129	5,098	6,031	523	313,729	363,967	86.2%
18	October	0	346	24	0	0	370	135	5,480	5,985	5,371	11,356	8,287	3,069	-2,302	311,427	364,424	85.5%
19	November	0	248	24	0	0	272	320	4,984	5,576	3,797	9,373	6,192	3,181	-616	310,811	364,424	85.3%
20	December	231	113	0	0	0	344	324	3,745	4,413	5,043	9,456	5,619	3,837	-1,206	309,605	364,424	85.0%
21	Total for 2012	670	3,817	117	0	0	4,604	2,468	58,527	65,599	50,553	116,152	64,590	51,562	1,009	309,605	364,424	85.0%
22	Enrollments via data sharing between the IOUs.																	
23	Enrollments via data sharing between departments and/or programs within the utility.																	
24	Enrollments via data sharing with programs outside the IOU that serve low-income customers.																	
25	One-E-App is a pilot program set up by The Center to Promote Healthcare Access (the Center) and PG&E. The pilot will occur within two PG&E counties and looks to implement a strategy of automatic enrollment for low-income customers into the CARE program based on the customers' applications or reapplications for related low-income health and social welfare services. (e.g. MediCAL, Healthy Families, CALKids, etc.) The goal is to develop another means by which low income families can be introduced into the CARE program and, depending on the success of the pilot, possibly expand this pilot to other counties within PG&E's territory as well as to the other IOUs.																	
26	Not including Recertification.																	

2012 CARE Annual Report
CARE Table 3 - Standard Random Verification Results
San Diego Gas & Electric Company

2012	Total CARE Population	Participants Requested to Verify ¹	% of Population Total	Participants Dropped (Due to no response) ^{2,3}	Participants Dropped (Verified as Ineligible)	Total Dropped	% Dropped through Random Verification ⁴	% of Total Population Dropped
January 2012	308,496	1,071	0.35%	426	104	530	49.49%	0.17%
February 2012	308,257	1,041	0.34%	422	116	538	51.68%	0.17%
March 2012	309,625	769	0.25%	328	93	421	54.75%	0.14%
April 2012	311,110	1	0.00%	1	0	1	100.00%	0.00%
May 2012	311,499	0	0.00%	0	0	0	0.00%	0.00%
June 2012	311,605	1	0.00%	0	0	0	0.00%	0.00%
July 2012	312,101	1,114	0.36%	488	168	656	58.89%	0.21%
August 2012	313,206	1,223	0.39%	570	180	750	61.32%	0.24%
September 2012	313,729	1,090	0.35%	550	166	716	65.69%	0.23%
October 2012	311,427	1,552	0.50%	812	177	989	63.72%	0.32%
November 2012	310,811	464	0.15%	275	43	318	68.53%	0.10%
December 2012	309,605	788	0.25%	252	76	328	41.62%	0.11%
Total for 2012	309,605	9,114	2.94%	4,124	1,123	5,247	57.57%	1.69%

¹ Participants were randomly selected for verification process through the SDG&E probability model. Participants verified number does not include customers who passed the SDG&E's CARE eligible probability model.

² Verification results are tied to the month initiated and the verification process allows customers 90 days to respond to the verification request. Results may be pending due to the time permitted for a participant to respond. Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

³ Verification was temporarily suspended from April until July 1, 2012 to allow for implementation of structure change in 2012 Income Guidelines that separated household sizes 1 and 2.

⁴ Percentage of customers dropped compared to the total participants requested to verify in that month.

2012 CARE Annual Report
CARE Table 4 - CARE Self-Certification and Self-Recertification Applications¹
San Diego Gas & Electric Company

	Provided	Received	Approved	Denied	Pending/Never Completed	Duplicates
Total	580,708	129,737	119,651	9,201	121	764
Percentage		22.3%	92.2%	7.1%	0.1%	0.6%

¹ Includes sub-metered customers.

2012 CARE Annual Report
CARE Table 5 - Enrollment by County
San Diego Gas & Electric Company

County	Estimated Eligible			Total Participants			Penetration Rate		
	Urban ¹	Rural	Total	Urban	Rural	Total	Urban	Rural	Total
San Diego County Electric	339,373	8,586	347,959	289,449	6,702	296,151	85.1%	78.1%	85.1%
Orange County	16,465	--	16,465	13,454	--	13,454	81.7%	0.0%	81.7%
Total	355,838	8,586	364,424	302,903	6,702	309,605	85.0%	78.1%	85.0%

¹ Rural includes ZIP Codes classified as such according to the Goldsmith modification that was developed to identify small towns and rural areas within large metropolitan counties.

	A	B	C	D	E	F	G	H	I
1	2012 CARE Annual Report CARE Table 6 - Recertification Results San Diego Gas & Electric Company								
2									
3									
4									
5	2012	Total CARE Population	Participants Requested to Recertify ¹	% of Population Total	Participants Recertified ^{2,3}	Participants Dropped	Recertification Rate % (E/C) ⁴	% of Total Population Dropped (F/B)	
6	January	308,496	2,526	0.82%	1,373	485	54.35%	0.16%	
7	February	308,257	2,573	0.83%	1,408	540	54.72%	0.18%	
8	March	309,625	4,072	1.32%	2,583	665	63.43%	0.21%	
9	April	311,110	936	0.30%	549	198	58.65%	0.06%	
10	May	311,499	2	0.00%	1	0	50.00%	0.00%	
11	June	311,605	0	0.00%	0	0	0.00%	0.00%	
12	July	312,101	6,405	2.05%	3,560	1,735	55.58%	0.56%	
13	August	313,206	8,862	2.83%	4,698	2,707	53.01%	0.86%	
14	September	313,729	3,095	0.99%	1,693	971	54.70%	0.31%	
15	October	311,427	3,749	1.20%	2,063	1,203	55.03%	0.39%	
16	November	310,811	3,554	1.14%	2,094	1,130	58.92%	0.36%	
17	December	309,605	2,756	0.89%	1,533	989	55.62%	0.32%	
18	Total for 2012	309,605	38,530	12.44%	21,555	10,623	55.94%	3.43%	
19									
20									
21	¹ Participants were randomly selected for recertification process through the SDG&E probability model. Participants recertified number does not include customers who passed the SDG&E's CARE eligible probability model.								
22	² Recertification results are tied to the month initiated and the recertification process allows customers 90 days to respond to the recertification request. Results may be pending due to the time permitted for a participant to respond. Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.								
23	³ Recertification was temporarily suspended from May until July 1, 2012 to allow for implementation of structure change in 2012 Income Guidelines that separated household sizes 1 and 2.								
24	⁴ Percentage of customers dropped compared to the total participants requested to recertify in that month.								

2012 CARE Annual Report
CARE Table 7 - Capitation Contractors
San Diego Gas & Electric Company

Contractor Name	Contractor Type (Check one or more if applicable)				Enrollments		
	Private	CBO	WMDVBE	LIHEAP	Rural	Urban	Total
211 PHONE ENROLLMENT		X			0	513	513
AFRICAN ALLIANCE		X			0	17	17
AKA HEAD START		X			0	1	1
AMERICAN RED CROSS		X	X		0	587	587
BLACK CONTRACTORS ASSOCIATION INC		X			0	2	2
CASA FAMILIAR		X			0	3	3
CASH PLUS	X				0	2	2
CATHOLIC CHARITIES		X			0	114	114
CHILDREN'S INITIATIVE		X			0	3	3
CHINESE SERVICE CENTER		X			0	4	4
CHULA VISTA COMMUNITY COLLABORATIVE		X			0	20	20
CITY HEIGHTS COMMUNITY DEVELOPMENT CORP		X			0	1	1
CRISIS HOUSE		X			0	19	19
ELDER HELP OF SAN DIEGO		X			0	1	1
FEEDING AMERICA SAN DIEGO		X			0	5	5
FOSTER LIFT		X			0	7	7
HEARTS AND HANDS TOGETHER		X			0	7	7
HOME START		X			0	5	5
HORN OF AFRICA		X			0	5	5
KURDISH HUMAN RIGHTS WATCH		X			0	2	2
LA MAESTRA FAMILY CLINIC		X			0	48	48
MAAC PROJECT		X		X	0	108	108
NEIGHBORHOOD HEALTH CARE		X			0	93	93
NORTH COUNTY HEALTH PROJECT		X			0	67	67
NORTH COUNTY INTERFAITH COUNCIL - ESCONDIDO		X			0	6	6
PAZZAZ, INC.		X			0	4	4
REBUILDING TOGETHER SAN DIEGO		X			0	0	0
SALVATION ARMY		X			0	0	0
SAN DIEGO FOOD BANK		X			0	2	2
SAN DIEGO STATE UNIVERSITY - WIC		X			0	483	483
SAY SAN DIEGO		X			0	8	8
SCRIPPS HEALTH WIC		X			0	32	32
SERVICENTRO SAN CLEMENTE, INC	X				0	120	120
SOMALI FAMILY SERVICE OF SAN DIEGO		X			0	2	2
SOUTHERN CALIFORNIA TRIBAL CHAIRMEN'S ASSOCIATION		X			0	4	4
THE HARRIS GROUP	X				0	216	216
UNION OF PAN ASIA COMMUNITIES COUNSEL & TREATMENT		X			0	8	8
VISTA COMMUNITY CLINIC		X			0	35	35
YMCA YOUTH AND FAMILY SERVICES		X			0	20	20
Total Enrollments					0	2,574	2,574

2012 CARE Annual Report
CARE Table 8 - Participants per Month
San Diego Gas & Electric Company

2012	Gas and Electric	Gas Only	Electric Only	Total	Eligible Households	Penetration	% Change¹
January	206,831	N/A	101,665	308,496	362,325	85.1%	0.0%
February	208,399	N/A	99,858	308,257	362,325	85.1%	-0.1%
March	209,308	N/A	100,317	309,625	362,325	85.5%	0.4%
April	210,247	N/A	100,863	311,110	363,133	85.7%	0.2%
May	210,447	N/A	101,052	311,499	363,133	85.8%	0.1%
June	210,726	N/A	100,879	311,605	363,133	85.8%	0.0%
July	211,254	N/A	100,847	312,101	363,967	85.7%	-0.1%
August	212,002	N/A	101,204	313,206	363,967	86.1%	0.3%
September	212,039	N/A	101,690	313,729	363,967	86.2%	0.1%
October	210,386	N/A	101,041	311,427	364,424	85.5%	-0.7%
November	209,721	N/A	101,090	310,811	364,424	85.3%	-0.2%
December	208,634	N/A	100,971	309,605	364,424	85.0%	-0.3%
Total for 2012	208,634	N/A	100,971	309,605	364,424	85.0%	2.8%

¹Explain any monthly variance of 5% or more in the number of participants.

2012 CARE Annual Report

CARE Table 9 - Average Monthly Usage & Bill

San Diego Gas & Electric Company

Average Monthly Gas / Electric Usage			
Residential Non-CARE vs. CARE Customers¹			
	Gas Therms	Gas Therms	
Customer	Tier 1	Tier 2	Total
Non-CARE	20	6	26.25
CARE	17	4	23.00
	Electric KWh	Electric KWh	
Customer	Tier 1	Tier 2	Total
Non-CARE	280	231	511
CARE	289	147	437

Average Monthly Gas / Electric Bill		
Residential Non-CARE vs. CARE Customers¹		
(Dollars per Customer)		
Customer	Gas	Electric
Non-CARE	\$ 28.99	\$ 98.35
CARE	\$ 19.42	\$ 52.57

1 Excludes master-meter usage.

2012 CARE Annual Report
CARE Table 10- CARE Surcharge & Revenue
San Diego Gas & Electric Company

Electric					
CARE Surcharge and Revenue Collected by Customer Class					
				Total CARE	Percentage of
Customer	Average Monthly		CARE Surcharge	Surcharge Revenue	CARE Surcharge
Class	CARE Surcharge	Monthly Bill	as Percent of Bill	Collected	Revenue Collected
Residential*	\$1.56	\$96	1.60%	\$17,645,395	31.98%
Commercial	\$13.50	\$632	2.10%	\$23,476,430	42.55%
Agricultural	\$21.08	\$940	2.20%	\$987,818	1.79%
Large/Indust	\$1,623.02	\$45,105	3.60%	\$13,058,811	23.67%

* Excludes CARE customers

GAS					
CARE Surcharge and Revenue Collected by Customer Class					
				Total CARE	Percentage of
Customer	Average Monthly		CARE Surcharge	Surcharge Revenue	CARE Surcharge
Class	CARE Surcharge	Monthly Bill	as Percent of Bill	Collected	Revenue Collected
Residential	\$0.97	\$25	3.90%	\$7,128,325	46.10%
Commercial	\$17.25	\$219	7.90%	\$6,228,539	40.28%
Natural Gas Vehicle	\$1,259.65	\$7,203	17.50%	\$444,657	2.88%
Industrial	\$2,258.47	\$5,530	40.80%	\$1,662,234	10.75%

NOTES:

Industrial includes both G-NT(D) and G-NT(T) and is net of volumes qualifying for G-COG.

2012 CARE Annual Report
CARE Table 11 - CARE Capitation Applications
San Diego Gas & Electric Company
CARE Capitation Applications
January 1, 2012 through December 31, 2012

Entity	Total Received	Approved	Denied	Pending/ Never Completed	Duplicate
211 PHONE ENROLLMENT	644	566	20	-	58
AFRICAN ALLIANCE	28	25	1	-	2
AKA HEAD START	2	1	-	-	1
AMERICAN RED CROSS	1,028	911	50	2	65
BLACK CONTRACTORS ASSOCIATION INC	6	6	-	-	-
CASA FAMILIAR	16	15	1	-	-
CASH PLUS	3	3	-	-	-
CATHOLIC CHARITIES	585	378	58	-	149
CHICANO FEDERATION	1	1	-	-	-
CHILDREN'S INITIATIVE	6	6	-	-	-
CHINESE SERVICE CENTER	21	21	-	-	-
CHULA VISTA COMMUNITY COLLABORATIVE	55	49	-	-	6
CITY HEIGHTS COMMUNITY DEVELOPMENT CORP	2	2	-	-	-
CRISIS HOUSE	94	82	3	-	9
ELDER HELP OF SAN DIEGO	1	1	-	-	-
FEEDING AMERICA SAN DIEGO	8	8	-	-	-
FOSTER LIFT	19	19	-	-	-
HEARTS AND HANDS TOGETHER	41	34	2	-	5
HOME START	10	8	-	-	2
HORN OF AFRICA	73	70	-	-	3
KURDISH HUMAN RIGHTS WATCH	6	5	1	-	-
LA MAESTRA FAMILY CLINIC	151	125	6	-	20
LEGAL AID SOCIETY OF SAN DIEGO, INC.	1	1	-	-	-
MAAC PROJECT	247	203	16	-	28
NEIGHBORHOOD HEALTH CARE	227	195	7	-	25
NORTH COUNTY HEALTH PROJECT	229	191	11	-	27
NORTH COUNTY INTERFAITH COUNCIL - ESCONDIDO	16	14	1	-	1
PAZZAZ, INC.	16	15	-	-	1
REBUILDING TOGETHER SAN DIEGO	1	-	1	-	-
SALVATION ARMY	-	-	-	-	-
SAN DIEGO FOOD BANK	5	3	-	-	2
SAN DIEGO STATE UNIVERSITY - WIC	865	775	36	-	54
SAY SAN DIEGO	11	11	-	-	-
SCRIPPS HEALTH WIC	118	106	5	-	7
SERVICENTRO SAN CLEMENTE, INC	145	138	4	-	3
SOMALI FAMILY SERVICE OF SAN DIEGO	1	1	-	-	-
SOMALI YOUTH UNITED, INC.	2	2	-	-	-
SOUTHERN CALIFORNIA TRIBAL CHAIRMEN'S ASSOCIATION	14	14	-	-	-
THE HARRIS GROUP - Outreach	695	558	52	18	67
UNION OF PAN ASIA COMMUNITIES COUNSEL & TREATMENT	11	7	-	-	4
UNION OF PAN ASIA COMMUNITIES ECONOMIC DEVELOPMENT	4	4	-	-	-
UNION OF PAN ASIA COMMUNITIES HEADQUARTERS	6	6	-	-	-
VISTA COMMUNITY CLINIC	111	101	3	1	6
YMCA YOUTH AND FAMILY SERVICES	34	32	1	-	1
Total	5,559	4,713	279	21	546

2012 CARE Annual Report
CARE Table 12 - CARE Expansion Program
San Diego Gas & Electric Company

CARE Expansion Program						
	Participating Facilities by Month (Gas)			Participating Facilities by Month (Electric)		
2012	CARE Residential	CARE Commercial		CARE Residential	CARE Commercial	
	Facilities	Facilities	Total	Facilities	Facilities	Total
January	246	129	375	365	186	551
February	244	128	372	366	185	551
March	246	128	374	370	185	555
April	276	128	404	400	184	584
May	298	130	428	431	195	626
June	321	138	459	458	211	669
July	293	137	430	428	204	632
August	293	137	430	428	203	631
September	293	136	429	427	205	632
October	302	137	439	436	205	641
November	302	137	439	436	205	641
December	303	137	440	435	205	640

CARE Expansion Program		
Average Monthly Gas / Electric Usage ¹		
	Gas	Electric
Customer	Therms	KWh
Residential Facilities	33	518
Commercial Facilities	301	4,918

¹ Excludes master meter usage.

CARE Expansion Program					
CARE Expansion Self-Certification and Self-Recertification Applications					
	Received	Approved	Denied	Pending/Never Completed	Duplicates
Total	760	642	0	0	118
Percentage		84%	0.00%	0.00%	16%

2012 CARE Annual Report
CARE Table 13 - Fund Shifting
San Diego Gas & Electric Company

CARE Program Fund Shifting by Category 2012				
Program Year: 2012	Total Authorized	Total Shifted¹	% of Authorized Total	Shifted to/from?
CARE Budget Categories:	ex. \$x,xxx.xx	\$x,xxx	x%	To outreach
Outreach	\$ 2,125,410	\$0	0%	
Processing, Certification, and Verification	\$ 1,032,415	\$0	0%	
Information Tech./Programming	\$ 1,245,390	\$0	0%	
Pilots	\$ 108,000	\$0	0%	
Measurement and Evaluation	\$ 42,500	\$0	0%	
Regulatory Compliance	\$ 154,917	\$0	0%	
General Administration	\$ 492,559	\$0	0%	
CPUC Energy Division Staff	\$ 49,535	\$0	0%	
Cooling Centers	\$ -	\$0	0%	
Total Expenses	\$ 5,250,726	\$0	0%	
Subsidies and benefits	\$ 73,857,625	\$0	0%	
Total Program Costs and Discounts	\$ 79,108,351	\$ -	0%	

1) Please report this number in standard accounting format, with negative amounts displayed in parentheses (\$xx,xxx.xx).