

**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 (U904G) for Approval of Low-Income Assistance Programs and Budgets for Program Years 2012-2014.	Application 11-05-018 (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 Budget (U39M).	Application 11-05-019 (Filed May 16, 2011)
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**ANNUAL REPORT ACTIVITY OF SAN DIEGO GAS & ELECTRIC COMPANY
(U 902 M) ON LOW INCOME ASSISTANCE PROGRAMS FOR 2013**

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May 01, 2014

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(U 902 M) ON LOW INCOME ASSISTANCE PROGRAMS FOR 2013**

This report presents the results and expenditures for the San Diego Gas & Electric Company (SDG&E) California Alternate Rates for Energy (CARE) program and Energy Savings Assistance (ESA) Program for program year 2013. The purpose of this report is to consolidate activity for the CARE and ESA Programs, and provide the California Public Utilities Commission's Energy Division with all the necessary information to assist in analyzing the low-income programs.

Respectfully Submitted,

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May 01, 2014

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

LOW INCOME ENERGY EFFICIENCY PROGRAM ANNUAL REPORT

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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.) 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

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

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.*

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 2013. In 2013, the ESA Program treated 17,568 homes, which is 86% of the 2013 goal. The program spent \$17,874,649 representing 81% of its authorized 2013 budget. At year end, there was a total of \$4,265,893 in unspent 2013 gas and electric ESA Program funds. In addition, SDG&E has \$8,580,108 in unspent electric and gas funds from pre-2013 program year. The cumulative unspent electric and gas funds are \$12,846,001 which represents 2013 unspent funds and prior program years' unspent funds. These unspent funds represent \$7,136,087 in electric carryover funds and \$5,709,914 in gas carryover funds from 2013 and prior years which SDG&E plans to carryover 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"> Implement energy education designed to help customers understand and change behaviors in ways that support ESA savings. 	<ul style="list-style-type: none"> As part of the in home assessment, customers take part in energy education. The energy education booklet is used as a tool for this process. The review includes information on energy costs and behavioral changes that can lead to a reduction in energy costs.
1.2: Develop a recognizable and trustworthy Brand/Tagline for the programs.	<ul style="list-style-type: none"> Launch integrated EE/ESA/DSM brand. 	<ul style="list-style-type: none"> The development of the statewide program name was completed during the 2009-2011 program cycle. In 2011, the Commission directed the investor-owned utilities (IOUs) to commence using the new program name now known as Energy Savings Assistance Program. <p>Assigned Commissioner Ruling issued October 13, 2011 directed the IOUs to cease Engage 360 statewide branding efforts.</p> <p>In D.12-05-015, the Guidance Decision, it directed the utilities to discontinue the use of the Engage 360 brand and to develop a strategy and budget for transitioning toward the use of "Energy Upgrade California" (EUC) as a statewide umbrella brand. It also directed the utilities to utilize unspent funds from the Engage 360 campaign toward expenditures for EUC ME&O, web portal maintenance, and limited augmentation of</p>

Implementation Plan and Timeline		
Strategies	Term 2012 - 2014	IOU strategy employed this program year
		<p>programs related to EUC during 2012.</p> <p>During 2013 there were no additional efforts. However on December 19, 2013, the Commission issued D.13-12-038 which adopts a statewide ME&O plan for residential and small business energy management, to take effect immediately and extend through the end of 2015. The decision directs the California Center for Sustainable Energy (CCSE) to implement the plan that it submitted March 14, 2013, with the modifications.</p>
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 	<ul style="list-style-type: none"> • In 2013, a focus group was conducted with property owners to better understand reluctance to allow ESA Program services at rental units. Learnings and observations from the focus group will be used to strategize outreach efforts for this segment in 2014. • ESA Program leverages services with the California Department of Community Services and Development's Low Income Home Energy Assistance Program agencies (MAAC and Campesinos Unidos, Inc.) and overlapping customers with Southern California Gas Company, to serve customers under both programs, providing customers with more measures and driving efficiencies in the programs.
1.4: Promote the growth of a	<ul style="list-style-type: none"> • Implement Energy 	<ul style="list-style-type: none"> • SDG&E ESA Program

Implementation Plan and Timeline		
Strategies	Term 2012 - 2014	IOU strategy employed this program year
trained Energy Savings Assistance Program workforce.	<p>Savings Assistance Program workforce education and training.</p> <ul style="list-style-type: none"> • Coordinate resources for training related to ESA program needs to ensure delivery of ESA-trained resources to the program. 	<p>representatives attended outreach and assessment training sessions conducted by other IOUs and visited Proteus Inc. and the Center for Employment Training facilities, in an effort to gain knowledge and understanding of best practices and options for implementing a workforce education and training program in 2014.</p> <ul style="list-style-type: none"> • SDG&E ESA Program staff worked with the Energy Efficiency Workforce Education and Training Program to identify ESA Program training to be offered to program contractors in 2014.

**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"> • Continue to expand partnerships with stakeholders and seek new opportunities for data sharing. 	<ul style="list-style-type: none"> • A referral process between the ESA Program and the Middle-Income Direct Install (MIDI) Program was implemented. ESA Program applicants who were identified as over-income were referred to the Middle-Income Direct Install Program and MIDI Program applicants who met the ESA Program guidelines were referred to the ESA Program. <p>ESA Program continues to collaborate with the Multi-Family</p>

Implementation Plan and Timeline		
Strategies	Term 2012 - 2014	IOU strategy employed this program year
		<p>Energy Efficiency Rebate (MFEER) program to better serve the qualifying customers in multi-family units and ensure they receive all feasible measures from both programs without overlap.</p> <p>Consolidated CARE/ESA Program online form to ease an income-qualifying customer to select participation in both programs by providing their personal information only once.</p> <p>Supported CSD with customer notification of CSD's solar water heating program, inviting previous ESA Program participants living in targeted employment areas to contact CSD for solar water heating rebates.</p>
<p>2.2: Coordinate and communicate between Energy Savings Assistance Program, energy efficiency and DSM programs to achieve service offerings that are seamless for the customer.</p>	<ul style="list-style-type: none"> Continually reevaluate and update programs to take advantage of new technologies. Explore in-home displays; home area networks and/or "pay-as-you-go" technology to assist low income customers manage their use. 	<ul style="list-style-type: none"> ESA Program participants are made aware of energy efficiency and other programs through an in-home education session during the initial visit, in addition to receiving an informational booklet "Extra help when you need it", which provides conservation information and other resources for saving energy. SDG&E continues to work with Grid Alternatives to serve qualifying low-income customers with the ESA Program who would also be participating in the Single-Family Affordable Solar Homes program (SASH). The SASH Program originated with California Assembly Bill 2723, which directed that a minimum of 10% of California Solar Initiative CSI funds be set aside for programs assisting low-income households

Implementation Plan and Timeline		
Strategies	Term 2012 - 2014	IOU strategy employed this program year
		in accessing solar technology.
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 opportunities to incorporate new energy efficiency measures into the ESA program, e.g., plug-load reduction, new HVAC technology. 	<ul style="list-style-type: none"> The ESA Program provided customers with major appliances such as refrigerators and high-efficiency (HE) clothes washers, and microwaves to drive larger savings for customers. The Smart Strip was also added in 2013. In addition, with the Commission's approval of the change in eligibility criteria for refrigerator replacements from pre-1993 to pre-1999, SDG&E replaced more eligible refrigerators as anticipated in 2013.
2.4: Increase delivery of efficiency programs by identifying segmented concentrations of customers.	<ul style="list-style-type: none"> Evaluate approach determine whether additional segments are needed. 	<ul style="list-style-type: none"> SDG&E conducted research on how to best reach the property manager, property owner segment, in order to infiltrate and successfully treat the renters. SDG&E also used Nielson segmentation information to tailor messaging to specific segments of its targeted population. SDG&E continued to cultivate its relationships with Community Based Organizations (CBOs) to further bridge the gap between the limited English proficient community and other cultural and ethnic barriers.

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	\$22,140,542	\$17,874,649	81%
Homes Treated	20,316	17,568	86%
kWh Saved	8,416,623	6,152,958	73%
kW Demand Reduced	2,017	628	31%
Therms Saved	283,727	319,007	112%
GHG Emissions Reduced (Tons)	6,290	5,250	83%

1.3. Marketing, Education, and Outreach

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. SDG&E’s service territory was segmented according to zip codes at the Zip+4 level. This segmentation allowed for targeted messaging to customers with high potential for eligibility, and the utilization of customers preferred channels of communication enabled SDG&E to drive customer enrollment. 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’s Branch Office locations provide customers with the ability to apply for the ESA Program. SDG&E coordinated these tactics in a multi-touch integrated approach to increase awareness and recall, and drive enrollments in the ESA Program. As part of its customer engagement outreach plan, SDG&E continued to build on earlier success with its community partners by educating and providing materials on the ESA

Program which included utilizing the new online process to facilitate program enrollments for customers. The ability of these neighborhood-based community partners to penetrate hard-to-reach customer segments also helped SDG&E to enroll customers where barriers of language, ethnic or cultural differences existed. In addition the continued expansion of SDG&E's Energy Solutions Partner Network allowed leveraging of both traditional messaging (e-mail, newsletters, direct mail) and social media (Facebook, Twitter, Pinterest) platforms to effectively deliver tailored messages to customers from organizations they are aligned with and trust. SDG&E worked with partners to provide education and engagement opportunities at more than 400 presentations and events in Southern Orange County and San Diego County. At the events with multicultural/multilingual partners or communities, SDG&E provided representatives who spoke the native languages, communicating more effectively with customers who often are representative of the hardest-to-reach population.

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.

Lower income customer segments tend to have energy use in Tiers 1 and 2. Marketing a “save money” message may not resonate with this segment as their bills are proportionate with Tier 1 or 2 use.

Some customers may feel the offer is “too good to be true”, being that free services and appliances are offered without a price to the customer. With the intent of breaking through the trust barrier, SDG&E took an approach that showed real customers, participating in the program, telling their story through multiple mediums. Email, print, television and online campaigns showcased a real family that participated in both the CARE and ESA Programs, carrying the comfort and saving money message.

SDG&E also utilized the target segmentation for the whole neighborhood approach by direct marketing through door-to-door and email efforts employed throughout 2013.

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 2013.

1.4. Energy Savings Assistance Program Customer Enrollment

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 2013, 597 customers (or 3.3%) 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 Commission's directive to continue categorical enrollment for ESA Program in targeted areas.⁴

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 achieved 86% of its annual goal in 2013. However, in combination of the annual goal for 2012 and 2013, SDG&E achieved 98% of the cumulative goal. Looking toward 2020, SDG&E has achieved 103% of its cumulative homes treated goal from program years 2009 through 2013. SDG&E has some challenges in ensuring that its annual goals are achieved and plans to make the appropriate changes. The requirement to obtain a copy of the agreement between property manager or landlord has been difficult and has created an obstacle which has greatly restricted SDG&E's ability to enroll customers residing in multi-family dwellings. SDG&E has expanded the array of measures installed by Outreach and Assessment (O&A) contractors which will enable contractors to achieve the three measure minimum installation upon enrollment and increase the number of households served, and reduce the number of visits required to treat the dwelling unit.

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 2013 measured 12%.

⁴ D. 12-08-044, Ordering Paragraph 2.

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) activities are designed to specifically support the needs of customers with disabilities. As an enhancement to customer segmentation efforts, SDG&E utilizes community-based organizations to provide education and engagement opportunities in support of the ESA Program. Partner segments include:

- Hearing & Vision
- Movement & Health Conditions
- Learning, Communicating & Remembering
- Mental Health

In addition, materials are developed on an as needed basis to help educate visually and hearing impaired customers. In 2013, large font printed collateral materials were updated.

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

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 has provided:

- Large-font printed materials
- Program information booklets in Braille

For customers with hearing impairments, SDG&E has provided:

- Videos in American Sign Language (ASL)
- Closed-captioned videos

SDG&E also actively promotes ESA Program with a variety of community-based organizations serving customers with special needs including:

- AARP
- Abled-Disabled Advocacy, Inc
- Access to Independence
- ARC – San Diego
- Braille Institute
- Burn Institute
- Challenged Athletes Foundation
- Deaf Community Services
- Developmental Disability Provider Network (DDPN)
- Disability Help Center
- Disabled Veterans of San Diego
- ElderHelp San Diego
- Meals on Wheels
- Mental Health Association
- National Alliance on Mental Illness
- San Diego Center for the Blind
- San Diego County – Aging & Independent Services
- San Diego Parks & Recreation – Disabled Services Advisory Council
- Southern Caregiver Resource Center
- Rehabilitation & Assisted Living Care Facilities
- Senior Centers

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

In 2013, SDG&E achieved 12% participation from the disabled community.

In an effort to reach the 15% goal, there are two primary components that contribute; programmatically from the outreach and assessment with program contractors and through marketing, education and outreach tactics.

Program contractors who did canvassing had the opportunity to identify disabled customers at the customer's request as part of the interview process/site visit. Program contractors mark this on the ESA Program assessment form.

Additionally, SDG&E continues to hone its marketing, outreach and enrollment strategies to target this unique community. SDG&E has expanded its network of partners who actively engage with the disabled community. SDG&E also has Customer Solutions Outreach Advisors who are specifically assigned to work with community based organizations that serve the disabled and special needs communities as direct liaisons to these SDG&E programs and services. SDG&E provides ESA Program information in large font and Braille versions to customers with visual impairments and provides videos in ASL for customers with a hearing impairment. ASL interpreters have also been made available to customers at select outreach events. 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.

1.6. Leveraging Success, 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.

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 community-based partner network and the Low Income Home Energy Assistance Program (LIHEAP) contractors to reach customers who may not have responded to other channels of marketing or for various reasons had reservations about 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. SDG&E also partnered with MAAC, a LIHEAP contractor to enroll customers who attended their Budget Management workshops.

In addition, SDG&E’s ESA Program collateral materials include program information advising customers that they may also be eligible for the programs offered by the California Department of Community Services and Development (CSD). Customers whose homes are not eligible for the ESA Program due to previous program participation

are referred to CSD for possible participation in their Weatherization Assistance Program.

Lastly, SDG&E has continued to work 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.

1.6.2. 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 the CSD partnership is the ability to provide 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.

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?

In 2013, SDG&E worked with CSD on the development and implementation of three pilots: Data Sharing, Bulk Procurement, and Solar Water Heating.

Data Sharing – Both the ESA Program and the LIHEAP Weatherization Program offer comparable services to similar households in overlapping areas. As a result of this overlap, resources are sometimes directed by both programs to the same customer. At best, this results in the customer receiving all eligible measures and services from each

program and at worst it results in duplication of some services and costs. The implementation of a CSD-IOU Data Sharing Tool will:

1. Minimize the possibility of customers being served by both programs
2. Facilitate leveraging opportunities between the IOUs and CSD
3. Maximize the opportunity for customer to received measures and services available through both program in the most efficient and cost-effective manner.

To date, the IOUs and CSD agreed to review and evaluate the SCE/SCG Data

Sharing Tool as a model for the IOU/CSD Data Sharing Tool.

Bulk Procurement – This initiative explored the opportunity for CSD’s Local Service Providers (LSP) to obtain the same pricing and appliance options available to IOU through existing IOU purchase orders. This would allow LSPs to incur costs for only those measures delivered and would enable better management of program funds and inventory by warehousing measures to address only their immediate need. The goals for this initiative were to:

1. Reduce overall costs associated with the purchase of appliances by CSD LSPs.
2. Maintain sufficient inventory of appliances available to LSPs thereby avoiding service disruption.
3. Provide reliable/timely delivery of inventory to LSP warehouses throughout the state.
4. Provide a comprehensive two-year all parts and labor warranty for all appliances purchased under the purchase order.

This effort did not demonstrate sufficient cost savings to be implemented at this time and the pilot was terminated at the end of November.

Solar Water Heating – The CSI low-income thermal program began offering substantial rebates in March 2012, however one year later there were no single-family applicants in the program. This lack of participation may indicate two key problems with the program:

1. Low-income families are unable or unwilling to pay the difference between the average cost of solar water heating, leaving a \$5,000 - \$6,000 funding gap
2. The design of the CPUC decision makes it difficult to identify qualifying customers because, in part, it requires ESA Program participation data from the IOUs that triggers customer consent issues.
3. SDG&E supported the Solar Water Heating effort by sending customers' information of CSD's solar water heating program, inviting previous ESA Program participants living in targeted employment areas to contact CSD for solar water heating rebates. SDG&E began mailing letters in September. In 2013, 600 letters were sent.

SDG&E continued to work with its local LIHEAP agencies, CUI and MAAC to leverage customer enrollments where feasible. However 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 leverage enrollments in 2013.

1.7. Integration Success

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."

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

In 2013, the programs further integrated in order to ease the customer experience and maximize leveraging potentially eligible customers. All mass media dollars were leveraged as a whole in order to maximize the media buys but also maintain the separate program budgets. Marketing campaigns took on dual program messaging such as dual program bill inserts which co-promoted both programs. Using customer experiences in the form of testimonials, experiences from customers participating in both programs were highlighted as much as possible. With the integration of the CARE and ESA program online enrollment process, tactical efforts such as email campaigns incorporated a dual program message as well. Email campaigns promoted both the programs, using testimonials from customers participating in both programs. Digital campaigns such as banner ads also co-promoted both programs. The marketing advisors that support the individual programs work side by side on all campaign strategy and tactics, ensuring continuity and integration overall.

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. As a result of the IDSM training conducted with hundreds of SDG&E employees last program year, each employee continues to serve in 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. SDG&E held trainings for over 100 community partners on the Home Assessment tool behind My Account. 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 Residential Direct Install (RDI) Program which offers no-cost installation of weatherization measures to single family homeowners who do not meet ESA Program income guidelines but fall into the next income bracket which is considered “middle income” whose household incomes fall between 201% and 300% of Federal Poverty Guidelines. As a result of this collaboration, the ESA Program referred over 900 customers to the RDI Program.

The ESA Program has worked closely with Energy Upgrade California Home Upgrade Program (EUC) to develop a comprehensive plan to coordinate the installation of energy saving measures in multi-family dwellings. In 2013, one EUC housing project was identified as having the potential of integrating with the ESA Program. The building is undergoing a gut rehabilitation of 172 units which will be receiving EUC-eligible measures. Once the rehabilitation work is complete, the units will be assessed for ESA Program eligibility. The estimated completion date for rehabilitation project is May 1, 2014.

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.

The ESA Program worked with the City of Chula Vista to integrate ESA Program literature into Chula Vista's residential outreach program and helped Chula Vista integrate their referral process with the ESA program requirements.

The ESA Program and the EE Government Partnership program have also started to work on integrating the ESA Program marketing materials and referral process into all residential outreach campaigns conducted by local government partners.

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.

Integrated marketing, outreach and program efforts, as described in 1.7.2 above, helped to increase the awareness of the CARE and ESA Programs amongst the Energy Efficiency program staff. In 2013, the marketing and outreach teams were organized under one internal team. This structure allowed for more cohesion and integration, centralized marketing efforts and better opportunities for cross-collaboration.

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 pursue specific efforts in 2013 related to the Energy Savings Assistance Program and Home Area Network devices.

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 continued to work 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.

In 2013, SDG&E continued its education efforts through the Energy Innovation Center. SDG&E offered 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. In addition, SDG&E began collaborating with Proteus, Inc., La Coopertiva and the Center for Employment and Training to develop a training program for low income workers in the neighborhoods served by the program as potential new hires for the ESA Program as Residential Outreach Specialists.

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 hosted the Business Industry Council's (BIC) San Diego Workforce Partnership at the ESA Program's contractor's quarterly meeting to promote their "Connect to Careers" summer program. The program prepares high school and college-aged students with businesses that align to their career interests and prepares the youth

with skills to enter the workforce. At least three contractors demonstrated interest in supporting BIC's effort in addition to contractors joining the Council.

Outreach contractor, The Harris Group, continues to hire local residents to provide multicultural and multilingual outreach support for the CARE and ESA Programs.

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. ESA Program contractors perform their own recruitment and hire employees from the local communities in which they work.

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 15 (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 under a master contract negotiated by SCE on behalf of all of the electric IOUs as part of a statewide RFP.

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.

Four statewide studies were authorized for the 2012-2014 ESA Program cycle.

These included: (1) an impact evaluation of the 2011 ESA Program; (2) an ESA Program energy education study; (3) a low-income needs assessment study; and (4) a low-income multifamily segment study. Each of these is described below.

D.12-08-044 (the decision authorizing these four studies) was adopted at the end of August 2012. Consultants for each study were selected through bid processes conducted during the last quarter of 2012. Contracts were awarded and work on each study began in first quarter 2013.

All studies were completed in 2013, in time to be used to inform the 2015-2017 ESA Program Applications. The delay in the issuance of D.12-08-044, combined with the logistics and technical requirements required to execute each of the studies according to the objectives outlined in the Decision, posed some challenges for each of the studies given the budgets allocated and their extremely aggressive schedules. Table 1.10.2 (directly below) provides an overview of the 2012-2014 studies, and a more expansive description of each study is provided further below.

TABLE 1.10.2: 2012-2014 ESA PROGRAM STUDIES

Study	Lead Consultant	Managing Utility	Project Initiation	Public Meetings	Final Report
Multifamily Segment Study	The Cadmus Group, Inc.	PG&E	1/18/2013	3/5/2013 9/25/2013 11/13/2013	12/4/2013
ESA Energy Education Study	Hiner & Partners, Inc.	SCE	1/24/2013	3/7/2013 10/17/2013	10/31/2013
Low Income Needs Assessment Study	Evergreen Economics	SCE	2/22/2013	3/19/2013 12/3/2013	12/16/2013
ESA PY2011 Impact Evaluation	Evergreen Economics	SDG&E	1/23/2013	2/20/2013 8/7/2013	8/31/2013

Joint Utility⁵ Low Income Multifamily (MF) Segment Study

PG&E was the contract manager for the MF Segment Study. The research contractor for this study was The Cadmus Group.

The central goal of the Multifamily Segment Study was to develop market segment profile information to investigate promising comprehensive multifamily segment strategies for the ESA Program to help develop and advance long-term plans to meet the needs of low income customers living in California multifamily housing as either owners or renters.

There were six key activities in this Study designed to meet the Decision's research objectives:

1. Gather California multifamily housing data relevant for low income customer programs.
2. Catalog existing multifamily energy efficiency programs relevant for low income customers.

⁵ The Joint Utilities are Pacific Gas & Electric (PG&E), Southern California Edison (SCE), Southern California Gas Company (SCG), and San Diego Gas and Electric Company (SDG&E).

3. Review and evaluate multifamily programs and research relevant for low income customers.
4. Identify and assess alternative program designs and delivery strategies.
5. Identify financing and funding options.
6. Solicit Public comment at key decision points.

The study performed a literature review of low income MF programs to look at program design options being successfully implemented in other jurisdictions. Other data sources included a review of financing opportunities, and analyses of census and demographic data. Interviews were conducted with IOU program managers and multifamily stakeholders, and a phone survey was conducted with property owners and operators.

The study findings included the following. Statewide, 30% of all California residential households qualify for the ESA Program; low income multifamily households represent approximately 9% of total California residential households. Seven percent of these low income multifamily households live in market-rate buildings, 2% in affordable housing, and less than one percent own their unit. Changing the focus to *all* low income households, the study found that 32% of low income households reside in multifamily buildings with five or more units. The percentage of low income multifamily households varies across the four IOUs, ranging from 39% to 27%. Furthermore, when viewed across the spectrum of all California *multifamily* households, 42% qualify as low income.

This study focused on the needs and issues of multifamily property owners and operators in their role as the ultimate decision-makers responsible for program participation in a whole building approach. This focus was a response to the Decision directive to explore a whole building approach.

One drawback to the study was the difficulty in getting property owners to participate in the survey. This was especially true with market rate multifamily building owners, who own the

majority of CA multifamily properties. These building owners, representing the majority of multifamily properties, were much harder to reach than owners and operators of affordable housing properties, who have more incentive to want to participate in energy efficiency upgrade programs due to federal requirements and tax incentives. This may be indicative of the challenges that may be expected in designing a program to reach low income tenants of all multifamily dwellings.

A public workshop to discuss the Research Plan was held on March 5, 2013 in San Francisco. Two additional workshops were held to solicit public comments on the preliminary results (September 25, 2013) and the draft report (November 13, 2013). The Final Report was issued and posted on December 4, 2013. The Joint Utilities will use the results from this study in developing the 2015-2017 ESA Program Applications.

Joint Utility ESA Energy Education Study

The prime research contractor for the energy education study was Hiner and Partners with KEMA as a subcontractor. SCE was the contract manager.

The overall purpose of the Energy Education Study was to identify ways to optimize and/or improve the educational component of the program. Along these lines, the two primary objectives of the Energy Education Study were to find improvement opportunities concerning: (1) how energy education is provided, and (2) what materials and content are provided. The study examined current and potential practices across the IOUs and comparable efforts done elsewhere to inform potential improvements to this component of the program.

Overall, the study found that energy education as delivered through the ESA program's assessment process assisted participants by providing information that helped them save money on their energy bill and addressed some of the barriers to reducing energy consumption in their homes.

In terms of overall delivery of the education component, the study found that the interactive customer specific delivery process is effective and follows best practices. In addition, assessor recruitment, selection, and retention processes as well as training were reported to be largely effective; though varied across the IOUs. Recommendations for potential improvements were offered around the use of some of the “best practices” that may be adopted across the joint utilities. In addition, the study found that the benefits of the education component are such that it may be prudent to support the provision of education at the time of the assessment even if the home does not qualify for other measures.

Regarding educational content, the study found that while the materials were relatively comprehensive, some suggestions for modifications and improvements were offered. Most notably, the study found that customers reported seeking more information on specific and practical appliance cost of use information.

The final study results were presented at a public workshop on October 17, 2013. The final report was issued and posted on October 31, 2013.

Joint Utility Low Income Needs Assessment Study

The Low Income Needs Assessment (LINA) Study was a statewide study managed by SCE. Evergreen Economics was the research contractor.

The previous low income needs assessment study was completed over five years ago and was based on data collected nearly 10 years ago.

The overall study objective for the 2013 study was to provide information on the needs of the low-income customers eligible for ESA and CARE programs. In particular, the study was expected to report estimates of eligible households; inform updates of remaining energy savings potential; assess customer perceptions and accessibility of the programs along with willingness

and barriers to participate; evaluate energy burden and insecurity; and identify energy-related needs and non-energy benefits.

The study's key findings included the following:

- Roughly 32% of California IOU households are eligible for CARE and ESA programs. Of these, 95% were enrolled in CARE as of the end of 2012⁶, and 59% of eligible households have been treated by ESA program.
- Both the CARE and ESA programs have been effectively reaching households in areas with key markets in need. The programs have been less successful reaching areas with more renters, extreme poverty and higher energy usage.
- Key barriers to ESA program participation include lack of customer trust of contractors; difficulty getting the landlord's approval for renting customers; customers having to be home for appointments; and homes needing measures the program offers. The requirement to provide income documents was not found to be a barrier.
- Roughly 52% of non-participants are willing to participate in ESA program. This is significantly less than the estimate reported by the previous Needs Assessment (95%).
- The mean energy burden is estimated at 8%.⁷ This is statistically unchanged from 2005 data collected for the prior Needs Assessment study.
- Single-family renters have greater energy-related needs and barriers to participation than single-family homeowners and multi-family dwellers.
- The average CARE customer saves \$29 per month (33% savings) on their electric bill and \$6 per month (18% savings) on their gas bill.
- 81% of ESA participants reported noticing a reduction in their energy bills and between 44 to 64% reported noticing improvements in health, comfort and safety.
- Customers reported that HVAC and weatherization measures are more likely to generate savings and improvements in health, comfort and safety. The next most beneficial measure reported was a refrigerator.

⁶ Note that as the IOUs increase post-enrollment verification, the penetration rate is going down as more households are removed from the program.

⁷ Based on taking the mean of customer-level ratios of energy burden.

The final study results were presented at a public workshop on December 3, 2013. The final report was issued in three volumes and posted on December 16, 2013.

Joint Utility 2011 ESA Program Impact Evaluation

The Impact Evaluation was a statewide study managed by SDG&E. The prime research contractor for the 2011 ESA Program Impact evaluation was Evergreen Economics.

The primary objective of this evaluation was to estimate first-year electric and gas savings and coincident peak demand reduction attributable to the 2011 ESA program. The results are used to quantify the 2011 program achievements, document the relative value of various measures in producing energy savings, produce savings forecasts, and meet filing and reporting requirements (including informing the development of the 2015-2017 ESA program application).

The methodology used in the study was a fixed effects billing regression model. Savings estimates were developed at the measure and household level. The study also conducted a customer phone survey of 602 participants whose billing data indicated increased usage in the period directly after program intervention. In an effort to find the best fit, various model specifications were used in the analysis. The final measure-level estimate values were chosen based on whether or not the ex-ante value fell within the resulting 95 percent confidence interval of the impact estimate; if not, evaluator judgment was used to assign a value from either an alternate model or the ex-ante value.

The impact study found that savings from the ESA Program measures was a small fraction of overall household energy consumption and that a significant number of ESA participant households are actually using more energy after their participation in the ESA Program. Evergreen Economics posited that customers may be unaware that they are using more energy.

The final impact estimates were generally consistent with the ex-ante savings values, although there is some deviation from the previous evaluation and from DEER values. Some natural variation across years was expected due to a variety of factors; including weather, measure mix and participant demographics.

The final study results were presented at a public workshop on August 7, 2013. The final report was issued in two volumes and posted on August 30, 2013.

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.

All four Statewide Joint IOU studies were completed in 2013 and final reports are available at www.energydataweb.com as well as www.calmac.org. Budgets spent compared to authorized budgets are included in Table 1.10.3.

**TABLE 1.10.3: 2012-2014 ESA PROGRAM STUDIES:
AUTHORIZED VS. EXPENSED BUDGETS**

Study	Lead Consultant	Managing Utility	Budget Authorized ⁸	Budget Expensed	%
Multifamily Segment Study	The Cadmus Group, Inc.	PG&E	\$400,000	\$399,340	100%
ESA Energy Education Study	Hiner & Partners, Inc.	SCE	\$300,000	\$217,195 ⁹	72%
Low Income Needs Assessment Study	Evergreen Economics	SCE	\$700,000	\$699,997	100%
ESA PY2011 Impact Evaluation	Evergreen Economics	SDG&E	\$600,000	\$489,364	82%

⁸ This amount represents the total authorized Joint Utility study budget. The authorized Joint Utility budget split is: PG&E--30%, SCE--30%, SCG--25%, and SDG&E--15%.

⁹ The expensed amount reported does not include the final invoice which is expected to bring the total to the contracted amount of \$250,764 for the Energy Education Study.

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 2013.

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 2013.

1.12. “Add Back” MeasuresFor 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.

1.12.1. 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 16. During 2013, 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.

1.13. Low Income Working Groups

D.12-08-044 authorized Energy Division to form three Working Groups, the: (a) Energy Savings Assistance Program Cost-effectiveness Working Group, (b) Energy Savings Assistance Program Workforce, Education and Training Working Group, and (c) Mid-Cycle Working Group to review those components of the Commission’s ESA and CARE Programs to make recommendations for refinements to improve, wherever possible, the design, administration, delivery and ultimate success of these programs.

SDG&E participated in each of the three Working Groups. The following is a brief summary describing SDG&E’s participation in each Working Group.

ESA Program Cost Effectiveness Working Group - In 2013, SDG&E participated in the ESA Program Cost Effectiveness Working Group. The Working Group submitted a White Paper to the Commission with cost effectiveness recommendations on February 14, 2013. Following further research, the Working Group submitted an Addendum on July 15, 2013. The Working Group recommended using a new program-level ESA Cost Effectiveness Test (“ESACET”) as well as a Resource

Measure TRC to assess cost effectiveness for the ESA Program. The Working Group recommended that additional time and stakeholder input is needed to identify an appropriate threshold to use for the cost effectiveness test. In addition, the Working Group recommended that an adder be developed for non energy benefits.

ESA Program Workforce, Education, and Training Working Group - In 2013, SDG&E participated in the ESA Program Workforce, Education, and Training (WE&T) Working Group, established in D.12-08-044. Between November 15, 2012 and July 15, 2013 the WE&T Working Group convened a total of ten meetings. The Working Group evaluated workforce data gathered by the IOUs from their ESA Program contractors and reported by the IOUs in compliance with D.12-08-044. The Working Group developed a list of researchable questions and recommendations pertaining to collecting and tracking demographic data. This information was submitted to the Commission on July 17, 2013.

Mid-Cycle Working Group - SDG&E participated in the Mid-Cycle Working Group. The Working Group met fifteen times between November 2012 to July 2013 to solicit input on the proposed updates and revisions to (a) the Statewide ESA Program Policy and Procedures Manual (P&P Manual); (b) the Statewide Installation Standards Manual (Installation Manual); (c) Streamlining of the Utilities' Reporting Requirements; (d) the Utilities' Best Practices; (e) General Mid-cycle Program and Process Improvements; and (f) Potential 2015-2017 Application and Cycle Issues, including whether the next cycle applications could benefit from bifurcation of California Alternate Rates for Energy Program issues from Energy Savings Assistance Program issues. On February 15, 2013, the Working Group submitted a Progress Report to the Commission including redlined updates to the P&P Manual.

On July 15, 2013, the Working Group submitted its Final Report, including a summary of the Final P&P Manual Updates, and a summary of proposed updates to the California Installation Standards Manual.

1.14. Annual Public ESAP and CARE Meeting

D.12-08-044 ordered the IOUs to convene a minimum of one public meeting per year, within 60 days of their filing of the annual report, and other public meetings as deemed necessary by the IOUs, the Energy Division, the ALJ, or the Commission. Additionally, IOUs were directed to use these meetings as a forum to host the working groups.

In compliance with D.12-08-044, SDG&E along with the other IOUs held a public forum in San Diego on June 7, 2013. The IOUs presented an overview of 2012 ESAP and CARE results, and discussed the CARE High Usage Post Enrollment Verification process, preliminary results of the CSD Pilots, the CHANGES Program, the Statewide Measurement & Evaluation Studies, and planning for the 2015-2017 ESAP and CARE Program cycle. In addition, the IOUs hosted the three Working Groups meetings and public workshops discussed above in Section 1.13.

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 Guidelines¹⁰.

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.

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.

¹⁰ D. 05-10-044.

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 2013. At year-end 2013, the CARE Program had enrolled over 57,000 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		
PY2013	CARE Customers	Percentage Change	PY2013	CARE Customers	Percentage Change
Jan	310,083	0.15%	Jan	208,779	0.07%
Feb	309,693	-0.12%	Feb	208,481	-0.14%
Mar	309,777	0.03%	Mar	208,528	0.02%
Apr	308,543	-.40%	Apr	207,672	-0.41%
May	307,842	-0.23%	May	205,228	-0.21%
Jun	305,195	-0.87%	Jun	202,341	-0.92%
Jul	301,101	-1.36%	Jul	202,871	-1.22%
Aug	301,477	0.12%	Aug	202,961	0.04%

TABLE 1					
Residential CARE Program Electric Customers by Month			Residential CARE Program Gas Customers by Month		
PY2013	CARE Customers	Percentage Change	PY2013	CARE Customers	Percentage Change
Sep	300,847	-0.21%	Sep	202,147	-0.40%
Oct	303,675	0.93%	Oct	203,970	0.89%
Nov	302,965	-0.23%	Nov	203,296	-0.33%
Dec	300,554	-0.80%	Dec	201,671	-0.81%

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 2013. 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. On December 21, 2012, the Joint Utilities requested an extension to file.¹¹ The updated CARE eligibility estimates for 2013 was submitted to the Commission on February 11, 2013 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

¹¹ On December 21, 2012, SCE on behalf of itself and the other IOUs requested an extension to file the CARE eligibility annual estimates for 2013 program year.

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.

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:

Number of CARE Customers

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 - 29.34%

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 - 21,755

Gas - 14,048

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

Electric –14,814

Gas – 12,411

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

Electric - 68.10%

Gas - 88.35%

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 Sub-metered 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	\$2,283,170	\$1,927,709	84%
Proc., Certification and Verification	\$636,188	\$259,463	41%
Post Enrollment Verification	\$403,200	\$156,019	39%
Information Tech./Programming	\$1,224,036	\$474,251	39%
Pilots	\$108,000	\$101,715	94%
Measurement and Evaluation	\$42,500	\$37,953	89%
Regulatory Compliance	\$160,136	\$102,428	64%
General Administration	\$505,430	\$353,385	70%
CPUC Energy Division Staff	\$53,002	\$16,612	31%
Cooling Centers	\$34,329	\$24,236	71%
Total Expenses	\$5,449,991	\$3,453,771	63%
Subsidies and Benefits ¹²	\$82,630,988	\$64,079,640	78%
Total Program Costs and Discounts	\$88,080,979	\$67,533,411	77%

¹² Represents the 20 percent discount to CARE customers' bills.

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

CARE Penetration			
Participants Enrolled	Eligible Participants	Penetration rate	Target Met?
300,554	353,997	85%	No

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.

SDG&E conducted an additional review of customer contact records regarding CARE recertification efforts not previously reported in 2013 monthly reports. SDG&E identified two complaint records regarding the renewal process.

CARE Recertification			
Month	Complaints Received	Nature of Complaint	Cases Resolved
February	1	Informal complaint. Customer believes they were improperly removed for non-response to renewal process.	Yes
August	1	Informal complaint. Customer believes they were improperly removed during renewal.	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: \$5.73

Average Monthly Electric Discount: \$14.36

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

Gas Subsidy - \$13,060,690

Electric Subsidy - \$51,018,950

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 payments¹³ and any agency-related outreach support efforts are also included in this category.

Processing, Certification and Recertification: 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.

Verification:

This category includes: 1) processing labor for CARE income verification and CARE High Usage Verification processes; 2) responding to customers' inquiries regarding CARE income verification; and 3) resolving customer issues related to income verification.

¹³ Capitation payments are compensation fees paid to third-parties and community-based organizations that facilitate CARE enrollment for eligible hard-to-reach customers.

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.

Pilots: Included are the cost associated with the administration of the Community Help and Awareness with Natural Gas and Electricity Services (CHANGES) Pilot Program.

Cool Centers: Included are costs to support Cool Zone collateral pieces and staffing for the fan distribution to home-bound low-income seniors.

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 - \$8,615,221 under-collected balance.

Gas CARE – \$613,527 over-collected balance.

In April 2013, SDG&E made a \$1,099,424 adjustment to its Electric CARE balancing account in order to include auto enroll discounts not recorded from November 2008-March 2013 due to an internal reporting error.

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. There are no CARE costs related to the 20% discount charged in 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.

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 initiate a specific action from customers. In 2013, SDG&E's direct marketing tactics included email campaigns, automated voice messaging (AVM) campaigns, bill inserts and door-to-door efforts.

Email campaigns

Campaigns were leveraged with the ESA program and contained an integrated message, directing customers to the online application process. Customer testimonials were the featured concept while subject lines and content were modified based on results. Unique open rates, defined as how many people opened the email, were as high as 32%, indicating the subject lines were compelling to customers. By comparison, industry

standard open rates hover around 26%. Email campaigns were designed in tandem with the corresponding awareness campaigns that featured the same customer testimonials in order to reinforce messaging and generate familiarity amongst customers. See Appendix 1 for sample of email creative.

AVM Campaigns

Approximately 140,000 contacts took place using the AVM platform in 2013. Calls were administered by a third party vendor via an automated outbound dialing system. The campaign strategy was designed by SDG&E, including the development of the script. Customers were able to interact with the system and provide pertinent information in order for SDG&E to procure the enrollment. Approximately 985 customers enrolled using the AVM system. This number represents a sharp decline from previous years and SDG&E is considering the options for this tactic due to the low return on investment (ROI). Considering automated calls have a tendency to be seen as bothersome, SDG&E does not want to jeopardize the relationship with our customers, even though the intent is to offer program services.

In addition, SDG&E used the AVM system to renew CARE customers, offering the option of recertification by phone. This additional renewal option occurred before the customer's auto scheduled renewal letter, thus reducing the number of renewals sent by mail. The success of the campaign was measured by the number of customers who chose to take part in this renewal option. Because 6,807 customers chose this option, SDG&E deemed renewal by phone a success. SDG&E believes renewal by AVM a strong alternative to renewing by mail. We believe CARE customers are more apt to take part in the call because of their current state of participation, and therefore have less resistance compared to AVM enrollment calls to non-CARE customers.

Bill inserts

The mandated annual CARE bilingual notification took place in July. All residential customers not enrolled in the program received the bilingual application in their SDG&E bill. In addition, another CARE insert took place in March. In November, a bilingual insert promoting both programs occurred. Customers were directed to the new dual online application process for both CARE and the ESA program. See Appendix 2 for sample of bill insert.

Door-to-Door

In order to target the harder to reach neighborhoods, SDG&E collaborated with a third party, Diverse Business Enterprise (DBE) vendor, The Harris Group, to identify, strategize and implement door to door campaigns. Contractors canvassed neighborhoods that were harder to reach using traditional tactics and were able to interact with customers, in-language when necessary, to enroll them in the programs. In 2013, door-to-door efforts contributed 8,642 customers for the program.

Integration Efforts

Represents the combined efforts of internal resources to raise program awareness and create a positive customer experience. In 2013, integration efforts included SDG&E's interactive voice response (IVR) system, Energy Service Specialists (ESS), branch offices, field collectors, collection calls, and informational brochures.

Interactive Voice Response (IVR)

SDG&E's Energy Service Center assists thousands of customers with a variety of energy inquiries. While waiting to speak with an Energy Service Specialist (ESS), customers are provided information about the CARE and ESA programs in both English and Spanish. Customers are provided an option of requesting a CARE application through this process as well. In 2013, there were 3,451 requests for English applications

and 682 requests for Spanish applications coming through the company's IVR system. In addition, the CARE program has a dedicated program IVR in which customers may call and enroll in the program. The IVR asks a series of questions used to determine eligibility for the program and customers interact using the touch tone keypad on their phone. The system offers English and Spanish options and in 2013, 2,890 enrollments resulted from the CARE IVR.

Energy Service Specialists (ES Specialists)

SDG&E's customer contact center, or Energy Service Center, continually interacts with customers. In their handling of various inquiries, they are trained to offer solutions to customers, depending on the individual need. Customers inquiring about high bills or specifying trouble paying their bill are advised of an array of solutions and resources the programs may offer, including the CARE program. In 2013, ES Specialists enrolled 5,990 customers in the CARE program.

Branch Offices

The Customer Assistance group and the company's bill payment locations continually collaborate and leverage outreach solutions for customers. Customer service reps are trained on the programs in order to identify those that might benefit and the outreach team regularly engages the branch offices with consistent visits that incorporate training presentations, and overall mutual collaboration. Additionally, Energy-Saving Solutions events were held at branch office locations on high-traffic days to service customers overflow customers waiting in line for service. In 2013, 7,033 enrollments were generated through branch office interactions.

Field Collection

SDG&E field collectors deliver notices of disconnection to customers facing disconnection due to non-payment. Collectors are educated through training about the CARE program and also include CARE applications as part of their collection process.

Collection Call

SDG&E provides an additional outbound telephone call and a follow up letter to customers facing collection activity on their account. The letter includes information about solutions available to them including payment arrangements and information on the assistance programs.

Informational Brochures

Informational brochures offered throughout the company include information on the assistance programs. The Whole House Guide offers customers information on residential energy efficiency resources such as rebates, energy surveys and appliance recycling, and also includes information on assistance programs. The Guide to SDG&E Services details the various services offered and includes information about the assistance programs. The Floor to Ceiling Guide, also containing helpful energy efficiency information includes information on assistance programs. The brochures are available to customers through direct requests or are available at various outreach events. Due to the structure of SDG&E's marketing group, collateral development is done through collaboration with all marketing advisors, thus ensuring all program information is leveraged.

Mass Media

Diversified communication mediums designed to reach large masses of audiences and serve as an overall awareness driver to supplement direct marketing tactics. In 2013, mass media components included print, TV, radio and digital media.

Print Campaigns

Leveraging the testimonial concept, culturally relevant print ads were developed that specifically targeted the Chinese, Vietnamese and Filipino communities. Using real SDG&E employees, the in-language ads talked about the importance of the programs using culturally relevant cues that would resonated with the target audience. The ads ran in various Chinese, Filipino and Vietnamese publications. Digital banners ads were also modified and used in online campaigns, specific to targeting Asian American audiences. Examples of the print ads can be found in Appendix 3.

Television

Fifteen and thirty second TV spots, targeting general market and Hispanic audiences took place. Various English and Spanish television networks aired the spots, which featured real customers taking part in the programs and SDG&E employees as well. The spots served to create overall awareness in conjunction with the numerous direct marketing and outreach activities taking place.

Radio

Leveraging with SDG&E's Winter Prep campaign, fifteen second traffic IDs about the programs occurred on various radio stations. The IDs briefly described the benefits of the programs and how to apply.

SDG&E collaborated with Univision, a broadcast television network aimed at Spanish language audiences. Univision has a strong radio presence as well and SDG&E joined forces with one of their most popular radio personalities in an effort to promote the programs. Mery Lopez Gallo, host of the popular show De Viva Voz, featured an SDG&E employee as her guest. The two discussed the programs, the benefit to the Spanish language community, and how to apply. See Appendix 4.

Online Campaigns

SDG&E used an online strategy of increasing awareness for the programs, driving online submissions, and geo-targeting SDG&E's service territory to target low income segments. The campaign used efforts such as paid search, display ads, video ads, ad networks, audio networks, news networks, and mobile networks. A summary of each effort is outlined below:

Paid search – using hundreds of key words such as “bill discount”, “food stamps”, and “qualify for WIC” users were exposed to ads featuring information about the programs. More than 79,000 customers visited the Customer Assistance landing page on the SDG&E website as a result of using search terms.

Display ads – (graphic ads that appear next to content on web pages) geo-targeted ads featuring both customers and SDG&E employees had a .31% click through rate (CTR), which is defined as the percentage of times an ad is clicked on out of the total number of ad views within a given time period. This number represented an improvement on the CTR of 2012.

Video ads –pre-roll video on networks such as TubeMogul and NGL Media helped to increase awareness and campaign impressions to geo-targeted areas.

Ad networks – used for behavioral or geo targeting to hone in on the right customer segment. Alcance media group, a Spanish digital marketing company, was also used to target Spanish language audiences.

Audio networks – used Pandora for thirty second audio spots that described the programs. This was the first time using this medium and was considered successful due to the low execution costs compared to the high number (3.8 million) of impressions delivered. Impressions are defined as the number of times an ad is seen, whether clicked on or not.

News networks – publishers such as UT San Diego, ESPNLA and ESPN Deportes, combined with other tactics, served to increase impressions and overall clicks.

Mobile networks – Millennial Media was used for digital mobile advertising. Display ads had a strong performance, delivering almost 4.6 million impressions. Using mobile networks this year produced a low click through rate yet delivered high impressions.

In summary, digital campaigns produced over 273,000 web visits, cost per click was reduced from last year, and the quality of impressions greatly increased over 2012. All digital campaigns were monitored throughout the year in order to gauge effectiveness early and often. For example, early on, ESPNLA was cancelled after not performing well and the budget allocated for ESPN Deportes was reduced due to performance as well.

Ethnic Marketing

SDG&E reached numerous ethnicities throughout the year with a variety of mass media tactics. Hispanic, African American, Chinese, Vietnamese, and Filipino audiences were targeted by print and digital campaigns, with a total ethnic spend of \$318,898.

Please see below for details.

Ethnic Online		
Audience	Impressions	Total Spent
Spanish	2,673,962	\$26,116.85
Chinese	4,250,216	\$27,102.99
Vietnamese	12,298,445	\$15,849.99
Filipino	793,067	\$11,944.26
		\$81,014.09

Ethnic Print		
Audience	Readership	Total Spent
Spanish	3,654,774	\$42,387.76
Chinese	1,584,000	\$29,112.00
Vietnamese	712,800	\$10,500.00
Filipino	1,350,000	\$24,900.00
African American	1,692,000	\$17,259.00
		\$124,158.76

Ethnic Television		
Audience	Impressions	Total Spent
Spanish	6,387,776	\$96,258.34
		\$96,258.34

Ethnic Radio		
Audience	Impressions	Total Spent
Spanish	2,673,404	\$17,467.71
		\$17,467.71

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

SDG&E believes a comprehensive strategy that includes a mix of outreach, mass media awareness and direct marketing tactics is the best approach in reaching the segment of customers that might benefit from the programs. With the integration of the CARE and ESA online enrollment process, reaching customers through email communications is cost effective, campaigns are nimble and can be optimized according to results and allows customers to apply for the programs in real time. Email statistics such as unique open rates as high as 32%, indicate customers are interested and moved to take action. Our high delivery rate (99%) means we continue to reach the right customer with our messaging. Because we know low income segments tend to use their smart phones as their main life line, and 55% of all emails were opened on a mobile device, we

optimized the email campaigns to be mobile friendly. As we progress, we continue to adapt the campaigns based on our learnings.

SDG&E believes the collaboration with The Harris Group; our door-to-door contractor is a key outreach method as door-to-door campaigns can reach further into the high opportunity areas of the community, as well as service to effectively service the hardest-to-reach customers. Leveraging the trust and goodwill this partner has established in the community has proven to be beneficial as a large number of enrollments came from door-to-door last year. Additionally, serving as our multi-lingual/multi-cultural outreach partner, The Harris Group raised awareness in communities where language or other cultural differences may apply.

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

SDG&E faces a number of barriers to participation and must constantly shift its focus in determining ways to counteract these challenges.

Economic Improvement

As the economy continues to improve, more and more customers are proactively reaching out to SDG&E requesting to be removed from the program. This aids SDG&E in its efforts to ensure that customers who qualify for the program receive the benefit and remain on the program. However it is important to note that these losses contribute to the attrition rate. SDG&E will continue to offer options for renewal, such as offering customers the option to renew by telephone and SDG&E will explore more direct communications such as email, for customers with valid email addresses and a preference for this channel.

Hardest to Reach & Unwilling

Through a variety of outreach, marketing and awareness campaigns, SDG&E has been persistent in its ongoing efforts to reach and enroll customers. In 2013, 57,520 eligible applications were received for the program. This is approximately 8,000 less than what was received in 2012. SDG&E has expanded resources each year in order to reach the largest amount of customers in hopes of achieving the 90% penetration rate. SDG&E have employed resources that, in the beginning, consisted of lower costs methods (the low hanging fruit principle) and over the years have shifted and expanded resources to increase enrollments. SDG&E understands and recognizes the population remaining to enroll could be the very hardest to reach and those unwilling to participate in the program. Continuing our work in the community through our outreach partners will remain a critical factor in reaching the “hardest to reach.”

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 166 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.

In September, SDG&E launched a new online enrollment process for customers potentially eligible for one of three Customer Assistance Programs: CARE, FERA and

ESA. The new process allows customers to submit qualifying program information via one web portal. The customer information is validated against SDG&E databases to provide customers with all potentially eligible programs. The customers is prompted to submit enrollment information for CARE or FERA, request a contractor call back to schedule an appointment for ESA, or is notified of non-qualification for any of the programs. Since implementation of the new online process, SDG&E has enrolled 7,190 customers to CARE.

SDG&E's ESA Program also 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 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. SDG&E enrolled over 1,977 customers to CARE by leveraging ESA enrollment information.

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

SDG&E continued working with its community based partner network 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. Activities included presentations, events, workshops, and customized messaging through a partner network of more than 200 community based organizations.

CARE Partners (Capitation Agencies): Working in partnership with organizations that serve low-income and in-need clients every day (often referred to as “intake agencies like WIC offices and social service agencies), SDG&E continued to train agency employees on how to engage customers in enrolling in the CARE Program during the customer’s visit at the partner’s office. Often the visit to a CBO is for another issue and the agency employee must work through the most pressing issue before promoting the utility programs with the customer. SDG&E has worked closely with its partner agencies to enroll eligible customers in CARE and other related low income programs. SDG&E also continues to work on leveraging with the LIHEAP contractors to offer customers the benefit from both state and utility programs.

Energy Solutions Partner Network: In 2013, SDG&E established its Energy Solutions Partner Network to provide enhanced opportunities with grassroots, neighborhood organizations serving the Southern Orange County and San Diego regions. These organizations are diverse and provide direct services to populations including seniors, special needs/disabled, low-income and young families. More than 400 activities were coordinated through these partners to promote the CARE Program in 2013. In addition, 211 San Diego -- an organization that provides San Diego County with community, health and disaster services through a free, 24/7 stigma-free phone service continues to be a very active partner in offering the CARE program and other customer assistance offerings as part of a comprehensive solution. In 2013, 211 San Diego was able to provide over 5,700 customers with CARE information resulting in 4,110 enrollments. Examples of Energy Solutions Partner messaging can be found in Appendix 5.

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 Home Energy Assistance Program. In addition, SDG&E's agreement with 211 San Diego calls for part of the customer screening to include referral to LIHEAP agencies (CUI and MAAC), as appropriate. In 2013, 211 San Diego handled over 33,000 utility-related calls and referred over 22,500 of those to LIHEAP agencies.

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's CARE program management continuously seeks opportunities to improve cost effectiveness in all areas of the program. As the pool of potentially eligible customers decreases, it becomes more challenging and costly to enroll customers. SDG&E focused on Outreach and Enrollment strategies to help improve the cost effectiveness of the program.

As discussed in Section 2.4.5, SDG&E created an integrated joint online enrollment process for the CARE, FERA and ESA Programs. While program efficiencies were expected and gained from leveraging the two processes, the key driver was to create a simple and positive experience for customers interested and qualifying for the SDG&E's income qualified programs. The process allows customers to submit all the required household information and the databases validate eligibility for CARE, FERA and ESA Program based specific factors. For example, a dwelling already serviced by ESA Program, but qualifying for CARE, would be offered CARE and provided a response that the household does not qualify for the ESA Program. Since implementation, CARE has seen a 12% increase in CARE online enrollments and ESA Program has experienced a 1,042% increase in leads over the highest 2013 quarter before implementation.

In 2013, SDG&E found that enrolling customers through previously successful AVM phone campaigns became more costly and less effective in enrolling customers in CARE. The cost of enrolling customers through and AVM increased from \$12.35 in 2012 to \$18.33 in 2013. SDG&E determined that less costly and more successful approach was to continue to focus on email campaigns.

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.

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 \$20 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.

High Usage Verification (HUV)

In D. 12-08-044, the Commission ordered the utilities to implement a process for income verifying customers with high usage. Customer with usage above 400% of baseline would be required to complete certain processes to remain on the program. Customers exceeding 600% of baseline had additional requirements. Customers with high electric usages would be required to:

- Provide a heightened income verification process for CARE
- Agree to participate in the ESA program, allowing access to all metered areas of the property

- Reduce usage to below 600% of baseline and maintain that level for 24 months.

SDG&E launched a manual process in June of 2013, targeting the 50 highest users. Over the course of 2013, SDG&E verified over 500 high usage customers manually. Manually mailing and tracking information to the customers was extremely labor intensive and did not allow for SDG&E to implement this effort on a larger scale. SDG&E faced many challenges with the full implementation of the process. The primary and most prevalent issues was the complexity of the system changes required to complete the process. The process impacted both the CARE and ESA Program databases, as well as the SDG&E billing system. Over 125 programs require updating and changing in order to complete the process. Additionally, due to the high level of dependency on the coordination between CARE and ESA Program, significant modifications to both databases need to be completed to automate the process. SDG&E expects to address all system issues and to complete full implementation of the HUV process in 2014.

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.

On September 1, 2013, SDG&E filed an advice letter with the Commission requesting approval for SDG&E long-term probability model. SDG&E requested approval to modify the initial two stage model and implement a one stage model.

In D. 12-08-044, the Commission ordered the utilities to track and report the following annually:

- Number of enrollments verified;
- Number of successful verification and de-enrollments;
- Number and reasons for each CARE customer de-enrollments during the PEV process (either through customer non-response or deemed ineligible for the program);
- How those successfully verified were initially enrolled in CARE (Capitation agency, self-certification, categorical enrollment, etc.);
- How those de-enrolled and ineligible customers were initially enrolled in CARE (Capitation agency, self-certification, categorical enrollment, etc.);
- Whether probability model is yielding optimal results by de-enrolling ineligible customers from CARE and ensuring that CARE discounts are not diverted to ineligible population.

Results for questions one through three can be found in CARE Table 3 of this report. Additional results are included in Appendix 6.

SDG&E is awaiting the Commission's approval on the final probability model in order to complete full implementation. Once fully implemented, SDG&E will begin additional analysis on model optimization in order to make improvements to the model, if needed.

2.7. Pilots

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 Program¹⁴ (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 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

¹⁴ 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.

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.¹⁵

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.

On June 24, 2013, the Joint Utilities submitted to the Administrative Law Judge a notice that, due to numerous concerns by the CHANGES contractors and CSID that the collection of the information would be overly burdensome to the CHANGES contractors. The Joint Utilities were unable to complete the development of the success criteria for the CHANGE program. The CHANGES contractor did provide enhancements to the monthly reporting and the utilities began reporting CHANGES information in the Monthly Report for August.

2.8. Studies

Categorical Programs

In D.12-08-044, the Commission directed the IOUs to jointly and annually review and submit by a Tier 2 Advice Letter an updated list of proposed categorical low income programs for the upcoming year, by January 31st of each year. Specifically, the decision states “[T]he list must propose to retain and add categorically eligible programs for enrollment in low income programs, as appropriate, and must include only programs with

¹⁵ D. 12-12-011, Ordering Paragraphs 3 and 9.

income thresholds consistent with the California Alternate Rates for Energy and Energy Savings Assistance Programs.”¹⁶

SoCalGas, on behalf of itself and the other IOUs, contracted with ICF International to review the current list of CARE and ESA Program categorical eligible programs. ICF researched and analyzed the current categorical eligible programs, as well as over 70 Federal, State, and County public assistance programs. The ICF Study results showed that none of the current list of categorical eligible programs had eligibility requirements that were perfectly aligned with the CARE and ESA Program eligibility requirements.

On January 31, 2013, the IOUs submitted a Joint Advice Letter, which included a copy of the ICF Study, to the Commission.¹⁷ In the Joint Advice Letter the IOUs proposed that the updated list of categorical programs should include only three programs: CalFresh/SNAP, the National School Lunch Program, and the Women, Infants, and Children Program because they were the only programs with eligibility criteria that were broadly aligned with the CARE and ESA Program’s eligibility requirements. In addition, the Advice Letter asked the Commission, as a condition of including three broadly aligned programs, to grant the IOUs the option of income verifying or accepting a categorical eligible program award letter for customers selected for CARE post-enrollment verification.

On April 30, 2013, the Energy Division notified the IOUs that the Joint Advice Letter was rejected because it raised unforeseen policy issues that required further review

¹⁶ Ordering Paragraph 88 of D.12-08-044.

¹⁷ See the Joint Advice Letter of Southern California Gas Company (Advice No. 4457), San Diego Gas & Electric Company (Advice No. 2455-E/2170-G), Pacific Gas and Electric Company (Advice No. 3361-G/4186-E) and Southern California Edison Company (Advice No. 2849-E) filed January 31, 2013.

in a formal proceeding. In addition, the Energy Division determined that the second of the two alternative reliefs sought approval of a relief not previously approved in D. 12-08-044 and, as such, was inconsistent with and in violation of D. 12-08-044.

In its annual letter to update the CARE and ESA Program's income program guidelines, issued on March 29, 2013, the Energy Division directed the IOUs to retain the current list of categorical programs until further notice.¹⁸ As such, SDG&E customers continued to enroll in CARE if they participated in one of the following public assistance programs throughout 2013: Bureau of Indian Affairs General Assistance, CalFresh/Supplemental Nutrition Assistance Program (SNAP), CalWorks/Temporary Assistance for Needy Families (TANF), Head Start Income Eligible (Tribal Only), Healthy Families A&B, Low Income Home Energy Assistance Program (LIHEAP), Medicaid/Medi-Cal, National School Lunch Program (NSLP), Supplemental Security Income (SSI), Tribal TANF, Women, Infants, and Children Program (WIC).

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.

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	6,372	3,209
Residential	1,850	1,304

¹⁸ See Notice to Investor Owned and Small and Multi-Jurisdictional Utilities Providing Service Under California Alternate Rates for Energy (CARE), Family Electric Rate Assistance (FERA), and the Energy Savings Assistance Programs, dated April 1, 2013.

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	40	381
Electric	527	7,529

3.3 Program Costs

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

Expanded CARE program cost totaled \$5,354. 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 - \$101.63

Residential Facility Electric Discount - \$262.36

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

Commercial Facility Gas Discount - \$592.41

Commercial Facility Electric Discount - \$2,212.22

3.4 Outreach

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

In addition to engagement activities – most specifically presentations and workshops coordinated through the Energy Solutions Partner Network -- SDG&E employees are the most effective outreach source for providing program information on the Expanded CARE offering. SDG&E employees have the opportunity to attend

employee informational events which provide them with messaging and collateral on residential programs that they can share with family, friends and neighbors. Many SDG&E employees donate their time and talents with local CBOs, which often provides a platform to discuss SDG&E Customer Assistance programs with eligible nonprofit organizations.

SDG&E Customer Solutions Advisors are able to identify opportunities to provide organizations with the information regarding program eligibility and 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.

Utilizing the combination of SDG&E employee involvement in nonprofit organizations and leveraging the existing activities of Energy Solutions Partner Network, SDG&E is able to effectively promote the Expanded CARE offering to qualifying facilities. Additionally, SDG&E's Customer Solutions Outreach Advisors visit these partners regularly to promote a variety of customer solutions including Customer Assistance programs. By leveraging these relationships, SDG&E is able to promote this offering as part of an overall partnership package with targeted organizations.

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 and SoCalGas do not currently share Expanded CARE facility information. SDG&E has one qualified Expanded CARE facility in the shared service territory. During renewal, SDG&E would contact this facility and ensure that they are aware that the Expanded CARE program is also available to them through 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.

The barrier to participation for Expanded CARE tends to come from a lack of knowledge regarding the availability of CARE to non-profit group living facilities within the non-profit community. To help mitigate these issues, SDG&E's Customer Solutions Outreach Advisors partner with agencies through the CARE Capitation program and other community based partnerships to increase awareness of the availability.

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.

SDG&E explored additional modifications to the CARE processing system to support Expanded CARE program processing. The modifications address a sorting issue that delayed the processing of additional satellite accounts linked to a facility. The system modifications were assigned to a system release and will be implemented prior to the 2014 Expanded CARE 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 was not scheduled to conduct the Expanded CARE renewal in 2013 and did not experience any significant program issues.

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

During 2013, SDG&E shifted funds in accordance with the rules set forth in D.08-11-031, as modified by D.10-10-008, and reaffirmed in D.12-08-044. See ESA Program Table 12 which provides a detailed accounting of the fund shifting activity that occurred during 2013.

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 2013.

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 set forth in Section 20.1 of D. 08-11-031, as modified in D.10-10-008, and reaffirmed in D.12-08-044 during 2013.

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 1-6

ESA and CARE Programs

APPENDIX 1-6

ESA and CARE Programs:

ESAP – No items

CARE



1. Email Campaign
2. Bill Insert
3. Print Campaign
4. Radio
5. Energy Solutions Partner
6. PEV – Responders and Non-Responders by Source and Type

2013 CARE/ESA Annual Report Items for Appendix

Email campaigns

Email creative (Appendix 1)

See if you qualify for home improvements and a bill discount through our Assistance Programs



Find Savings for Your Home

[Tweet](#) [Share](#) [Forward to a friend](#)

“We received \$3,000 in upgrades for our house and a 20% monthly discount.”

- The Banks Family

[Qualify Now »](#)

The Banks family is living more comfortably thanks to the home improvements they received. In addition, they're saving 20% every month on their energy bill.

If you're on a limited income or recently lost your job, you may be eligible for improvements like weather stripping and insulation* and even appliances like a new refrigerator or microwave**.

You could also be saving 20% a month with our monthly discount program, which can average about \$275 a year in savings.

It's easy to find out if you qualify

Visit our [program qualification page](#) to see if you qualify for home improvements and a bill discount through our Assistance Programs.

[Qualify Now »](#)

Bill Inserts

Bill insert (Appendix 2)



"We received \$3,000 in upgrades for our house and a 20% monthly discount."

Are you on a limited income or have recently lost your job? If so, you may be eligible for free energy-efficient home improvements* or an energy bill discount, or both.

The Banks family qualified and received approximately **\$3,000** worth of home improvements which included weather stripping, insulation, select appliances** like a new refrigerator, lighting and showerheads. In addition, they were eligible to receive a **20% discount** on their monthly bill.

To see if you qualify, visit us at
sdge.com/assistance



*As long as the residence was not previously served by the program.

**Existing appliances must meet age requirements to qualify for replacement. Co-pay may be required for landlords who own appliances and pay tenant utility bill.

These programs are funded by the utility customers and administered by San Diego Gas & Electric® under the auspices of the California Public Utilities Commission. SDG&E makes no representations as to the safety, reliability and/or efficiency of goods and services selected. SDG&E makes no warranty, whether express or implied, including warranty of merchantability or fitness for any particular purpose, use or application of selected goods and services.

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Mass Media
Print Campaigns
Print creative (Appendix 3)



*"Với Chương Trình CARE của chúng tôi, tiết kiệm tiền dễ dàng hơn quý vị tưởng."
— Linh-Chi, Nhân Viên của SDG&E®*

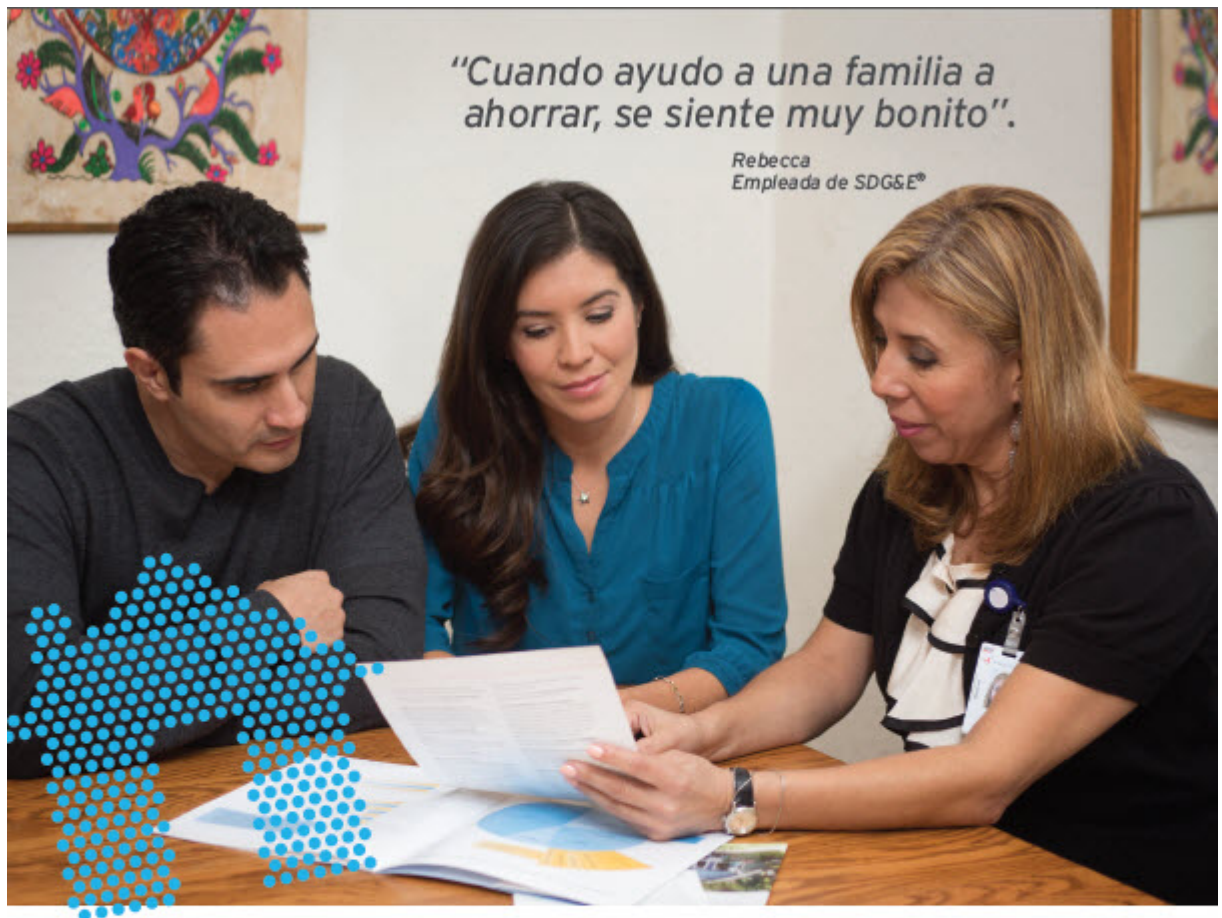
connected với tiết kiệm

"Đối với người cao niên, hoặc người sống với một mức lợi tức hạn chế hay người bất thình lình phải đối diện với khó khăn, tiết kiệm lên đến 20% trên hoá đơn năng lượng sẽ giúp nhẹ bớt phần nào phí tổn."

Đời sống nhiều bất ngờ. Nhiều thay đổi bất chợt. Chúng tôi tận lực tìm hiểu về các nhu cầu của quý vị, dù lớn hay nhỏ. Qua Chương Trình CARE, khách hàng có thể tiết kiệm trung bình \$275 mỗi năm. Hãy mang những ích lợi này về nhà chỉ cần nhấp vào chuột vài lần. Nếu quý vị hiện có lợi tức giới hạn hay gần đây vừa mất việc, quý vị có thể hợp lệ nhận chương trình CARE. Để xem quý vị có hội đủ điều kiện hay không, hãy vào sdge.com/Vietnamese hay gọi 211.

Chương trình này được tài trợ bởi khách hàng tiêu thụ của California và được tài trợ bởi Công ty Điện Khí & Điện Lực của California (SDG&E) và được tài trợ bởi California Public Utilities Commission.

SDGE connected
Sempra Energy utility



conectados para más comodidad en el hogar

Atender las necesidades de nuestros seres queridos con un presupuesto limitado puede ser todo un reto. Nuestro Energy Savings Assistance Program puede aumentar la comodidad de su hogar* y, al mismo tiempo, reducir sus costos de energía. Puede obtener gratis mejoras eficientes en energía para el hogar como aislamiento y colocación de burletes –y hasta aparatos seleccionados. Si tiene un ingreso limitado o recientemente se quedó sin trabajo, tal vez reúna los requisitos necesarios para participar.

Rebecca y nuestros demás representantes pueden ayudarle a ver si reúne los requisitos. Además, tal vez tenga derecho a recibir un 20% de descuento en la factura mensual de energía. Llame al 866-597-0597 o conéctese con nosotros en sdge.com/asistencia.

* Siempre y cuando la residencia no haya recibido anteriormente servicios del programa. Este programa está financiado por los clientes de las empresas de servicios públicos de California y administrado por San Diego Gas & Electric®, bajo los auspicios de la Comisión de Servicios Públicos de California.

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Energy Savings
Assistance Program™



Radio

Univision Radio Segment (Appendix 4)



Outreach

Samples of *Energy Solutions Partner Network* Messaging – 2014 (Appendix 5)

Bonsall Chamber of Commerce website

Solutions that can save customers up to 20% on their SDG&E bill

Take advantage of SDG&E programs that can help those with income challenges:

CARE and FERA


- Assistance programs based on income and household size

Medical Baseline

- An assistance program for customers with medical conditions requiring the use of high-energy equipment

Energy Savings Assistance

- A no-cost, home energy-efficiency upgrade based on income



Applications and more information can be found at sdge.com/assistance.

SDG&E also has the **Level Pay Plan** – which gives customers the opportunity to have a more predictable monthly bill by leveling out the highs and lows over the course of the year.

Just one more way SDG&E is connecting its customers to smart energy solutions.

Click [HERE](#) for CARE
Click [HERE](#) for FERA

Ramona Chamber of Commerce Facebook Post

 **Ramona Chamber of Commerce** shared a link.
May 31 near Ramona

Save up to 20% on your SDG&E bill. Visit sdge.com/assistance for more information.



Available Assistance Programs |
San Diego Gas & Electric
sdge.com

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Like · Comment · Share

(Appendix 5 - continued)

San Diego North Chamber Facebook Post



Laguna Niguel Chamber E-Blast to members



**CARE Program - 2013
Income Verification Responders
By Enrollment and Source Type**

Appendix 6

Enrollment Type	Eligible	Ineligible
Income	1,981	1,880
Assistance Programs	1,072	1,088
Undetermined	666	597
Total	3,719	3,559

Source Type	Eligible	Ineligible
Not Tracked	14	22
SDG&E Outreach Advisors	2	5
Direct Mail	70	87
Door-to-Door	24	22
Internet	31	19
LATE APPLICATION	55	23
Mass Media	9	7
Phone Enrollment	421	645
SDG&E	251	226
SDG&E Fulfillment Requests	103	87
SDG&E Internal Efforts	2,163	1,852
SDG&E Internal Leveraging	43	32
SDG&E Inter-Utility	8	20
SDG&E Program Marketing	329	328
SDG&E Program Outreach	35	43
Sub-metered	1	-
System	17	27
Third Party Contractor	104	89
Third-Party Agency	36	25
Total	3,791	3,559

CARE Program - 2013
Income Verification Non-Responders
By Enrollment and Source Type

Appendix 6

Enrollment Type	Verification Non-Responders Removed
Assistance Program	2,645
Income	4,190
Undetermined	1,202
Total	8,037

Enrollment Source Type	Verification Non-Responders Removed
ADVISOR	10
Direct Mail	132
DOOR TO DOOR	47
Internet	43
LATE APPLICATION	83
Mass Media	8
Phone Enrollment	1,421
SDG&E	456
SDG&E Fulfillment Requests	184
SDG&E Internal Efforts	4,096
SDG&E Internal Leveraging	60
SDG&E Inter-Utility	37
SDG&E Program Marketing	734
SDG&E Program Outreach	163
Sub-meter	1
System	51
Third Party Contractor	248
Third-Party Agency	95
Undetermined	168
Total	8,037

7. Appendix: Energy Savings Assistance Program Tables and CARE Tables

Summary Table – ESA Program and CARE Program

ESA Program- Table 1- Overall Program Expenses

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

ESA Program- Table 3- Cost Effectiveness

ESA Program- Table 4- Detail By Housing Type and Source

ESA Program- Table 5- Direct Purchases & Installation Contractors

ESA Program- Table 6- Installation Cost of Program Installation Contractors

ESA Program- Table 7- Expenditures by Cost Elements

ESA Program- Table 8- Homes Unwilling/Unable to Participate

ESA Program- Table 9- Life Cycle Bill Savings by Measure

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

ESA Program- Table 11- Bill Savings Calculations by Program Year

ESA Program- Table 12- Fund Shifting

ESA Program- Table 13- Categorical Enrollment

ESA Program- Table 14- Leveraging and Integration

ESA Program- Table 15- Lighting

ESA Program- Table 16- “Add Back” Measures

CARE- Table 1- CARE Overall Program Expenses

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

CARE- Table 3A- CARE Post Enrollment Verification Results (Model)

CARE- Table 3B- CARE Post Enrollment Verification Results (High Usage)

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

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 High Usage Verification Results

CARE- Table 14- CARE Categorical Enrollment

San Diego Gas Electric Company

Energy Savings Assistance Program and CARE Program

2013 Summary Highlights

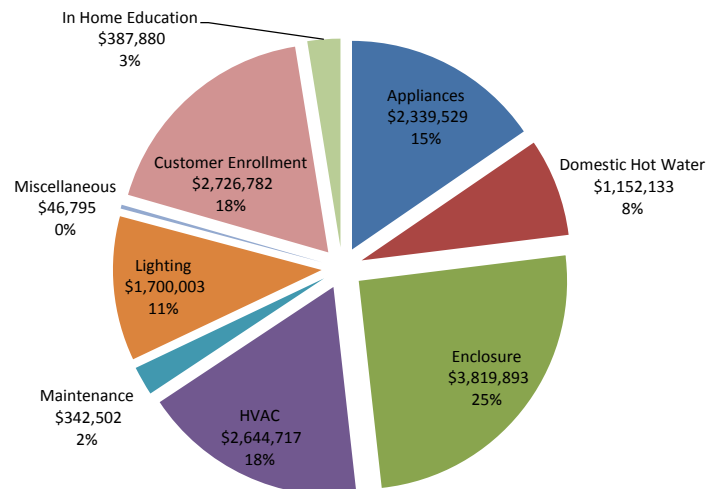
ESA Program

2013 Energy Savings Assistance Program Summary			
2013	Authorized / Planning Assumptions	Actual	%
Budget	\$22,140,542	\$17,874,649	81%
Homes Treated	20,316	17,568	86%
kWh Saved	8,416,623	6,152,958	73%
kW Demand Reduced	2,017	628	31%
Therms Saved	283,727	319,007	112%

CARE Program

2013 CARE Summary			
2013	Authorized Budget	Actual	%
Administrative Expenses	\$5,449,991	\$3,453,771	63%
Subsidies	\$82,630,988	\$64,079,640	78%
Service Establishment Charge	\$0	\$0	0%
Total Program Costs and Discount	\$88,080,979	\$67,533,411	77%
2013 CARE New Enrollments	Automatically Enrolled via Data Sharing, ESA Participation, etc	Self Certified as Categorically Eligible	Self Certified as Income Eligible
Method	2,282	24,758	30,480
2013 CARE Penetration	Estimated Eligible Participants	Participants	Penetration Rate
Total Enrolled	353,997	300,554	85%

2013 ESA Program Expenditures by Measure Group



San Diego Gas Electric Company

	A	B	C	D	E	F	G	H	I	J
1	<p align="center">PY 2013 Energy Savings Assistance Program Annual Report ESAP Table 1 ESAP Overall Program Expenses</p>									
2		2013 Authorized Budget			2013 Annual Expenses			% of Budget Spent		
3	ESA Program:	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
4	Energy Efficiency									
5	Appliances	\$ 3,703,271	\$ 891,923	\$ 4,595,194	\$ 1,791,754	\$ 547,775	\$ 2,339,529	48%	61%	51%
6	Domestic Hot Water	\$ 48,473	\$ 1,579,959	\$ 1,628,432	\$ 34,564	\$ 1,117,569	\$ 1,152,133	71%	71%	71%
7	Enclosure	\$ 1,424,793	\$ 1,855,723	\$ 3,280,516	\$ 1,642,554	\$ 2,177,339	\$ 3,819,893	115%	117%	116%
8	HVAC	\$ 380,775	\$ 1,272,769	\$ 1,653,543	\$ 202,870	\$ 2,441,848	\$ 2,644,717	53%	192%	160%
9	Maintenance	\$ 4,334	\$ 549,917	\$ 554,251	\$ 125	\$ 342,377	\$ 342,502	3%	62%	62%
10	Lighting	\$ 2,694,452	\$ -	\$ 2,694,452	1,700,003	\$ -	\$ 1,700,003	63%	N/A	63%
11	Miscellaneous	\$ 470,826	\$ -	\$ 470,826	\$ 46,795	\$ -	\$ 46,795	10%	N/A	10%
12	Customer Enrollment	\$ 1,592,991	\$ 1,592,991	\$ 3,185,982	\$ 1,363,391	\$ 1,363,391	\$ 2,726,782	86%	86%	86%
13	In Home Education	\$ 208,900	\$ 208,900	\$ 417,800	\$ 193,940	\$ 193,940	\$ 387,880	93%	93%	93%
14	Pilot	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	N/A	N/A	N/A
15	Energy Efficiency TOTAL	\$ 10,528,814	\$ 7,952,182	\$ 18,480,996	\$ 6,975,995	\$ 8,184,238	\$ 15,160,233	66%	103%	82%
16										
17	Training Center	\$ -	\$ -	\$ -			\$ -	N/A	N/A	N/A
18	Inspections	\$ 28,738	\$ 28,738	\$ 57,475	\$ 48,782	\$ 48,781	\$ 97,563	170%	170%	170%
19	Marketing and Outreach	\$ 576,870	\$ 576,870	\$ 1,153,740	\$ 369,902	\$ 369,902	\$ 739,804	64%	64%	64%
20	Statewide Marketing Education and Outreach	\$ 30,000	\$ 30,000	\$ 60,000	\$ 2,274	\$ 2,274	\$ 4,548	8%	8%	8%
21	Measurement and Evaluation Studies	\$ 27,500	\$ 27,500	\$ 55,000	\$ 36,702	\$ 36,702	\$ 73,405	133%	133%	133%
22	Regulatory Compliance	\$ 169,692	\$ 169,692	\$ 339,384	\$ 106,202	\$ 106,201	\$ 212,403	63%	63%	63%
23	General Administration	\$ 974,474	\$ 974,474	\$ 1,948,947	\$ 789,785	\$ 789,788	\$ 1,579,573	81%	81%	81%
24	CPUC Energy Division	\$ 22,500	\$ 22,500	\$ 45,000	\$ 3,560	\$ 3,560	\$ 7,119	16%	16%	16%
25										
26	TOTAL PROGRAM COSTS	\$ 12,358,587	\$ 9,781,955	\$ 22,140,542	\$ 8,333,202	\$ 9,541,446	\$ 17,874,649	67%	98%	81%
27	Funded Outside of ESA Program Budget									
28	Indirect Costs				\$ 418,962	\$ 430,984	\$ 849,946			
29	NGAT Costs				\$ -	\$ 292,397	\$ 292,397			
30										

San Diego Gas Electric Company								
PY 2013 Energy Savings Assistance Program Annual Report								
ESAP Table 2								
ESAP Expenses and Energy Savings by Measures Installed								
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San Diego Gas Electric Company

	A	B	C	D	E	F	G
1	PY 2013 Energy Savings Assistance Program Annual Report ESAP Table 3 ESAP Cost-Effectiveness						
2		PY - Recorded					
3		Ratio of Benefits Over Costs			Net Benefits		
4	Program Year	Utility Cost Test	Total Resource Cost Test	Modified Participant Test	Utility Cost Test	Total Resource Cost Test	Modified Participant Test
5	2013	0.51	0.40	0.60	\$ (8,155,801)	\$ (9,943,021)	\$ (7,146,892)
6	2012	0.68	0.53	0.86	\$ (6,858,625)	\$ (10,037,753)	\$ (2,953,674)
7	2011	0.45	0.33	0.90	\$ (11,090,027)	\$ (13,403,509)	\$ (2,139,522)
8	2010	0.50	0.38	0.95	\$ (9,449,217)	\$ (11,642,291)	\$ (1,079,270)
9	2009	0.54	0.42	0.83	\$ (7,204,451)	\$ (9,201,740)	\$ (2,809,076)
10	2008	0.64	0.52	0.77	\$ (6,120,166)	\$ (8,121,185)	\$ (4,070,011)
11	2007	0.41	0.32	0.62	\$ (7,781,493)	\$ (8,954,377)	\$ (4,866,416)
12	2006	0.33	0.54	0.61	\$ (9,883,548)	\$ (6,602,546)	\$ (5,837,643)
13	2005	0.45	0.70	0.99	\$ (7,115,009)	\$ (3,896,685)	\$ (66,902)
14	2004	0.47	0.73	1.07	\$ (7,584,889)	\$ (3,905,982)	\$ 938,847
15	2003	0.47	0.66	1.01	\$ (6,793,286)	\$ (4,419,991)	\$ 122,456
16	2002	0.41	0.63	0.83	\$ (7,298,174)	\$ (4,597,814)	\$ (2,053,787)
17							
18							
19							
20							

San Diego Gas Electric Company

PY 2013 Energy Savings Assistance Program Annual Report ESA Table 3A ESA COST-EFFECTIVENESS						
	PY - Recorded					
	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				\$ -	\$ -	\$ -
2011				\$ -	\$ -	\$ -
2010				\$ -	\$ -	\$ -
2009				\$ -	\$ -	\$ -
2008				\$ -	\$ -	\$ -
2007				\$ -	\$ -	\$ -
2006				\$ -	\$ -	\$ -
2005				\$ -	\$ -	\$ -
2004				\$ -	\$ -	\$ -
2003				\$ -	\$ -	\$ -
2002				\$ -	\$ -	\$ -

PY 2013 Energy Savings Assistance Program Annual Report ESA Table 3B ESACET by Dwelling Type							
		PY - Recorded					
	ESACET	Ratio of Benefits Over Costs			Net Benefits; \$ Millions		
Program Year		MF	SF	MH	MF	SF	MH
2013	With Admin				\$ -	\$ -	\$ -
	Without Admin				\$ -	\$ -	\$ -
2012	With Admin				\$ -	\$ -	\$ -
	Without Admin				\$ -	\$ -	\$ -

PY 2013 Energy Savings Assistance Program Annual Report ESA Table 3D ESA COST-EFFECTIVENESS				
	PY - Recorded			
	Ratio of Benefits Over Costs		Net Benefits; \$ Millions	
Program Year	ESACET	Resource TRC	ESACET	Resource TRC
2013			\$ -	\$ -
2012			\$ -	\$ -

PY 2013 Energy Savings Assistance Program Annual Report ESA Table 3C ESACET by Climate Area							
		PY - Recorded					
	ESACET	Ratio of Benefits Over Costs			Net Benefits; \$ Millions		
Program Year		Most Heating, Minimal Cooling (CZ 1-5)	Some Heating & Some Cooling (CZ 6-10)	Heating & Most Cooling (CZ 11-16)	Most Heating, Minimal Cooling (CZ 1-5)	Some Heating & Some Cooling (CZ 6-10)	Heating & Most Cooling (CZ 11-16)
2013	With Admin				\$ -	\$ -	\$ -
	Without Admin				\$ -	\$ -	\$ -
2012	With Admin				\$ -	\$ -	\$ -
	Without Admin				\$ -	\$ -	\$ -

San Diego Gas Electric Company

PY 2013 Energy Savings Assistance Program Annual Report ESAP Table 4 Detail by Housing Type and Source

		2013 Energy Savings				
Customer	Housing Type	# Homes Treated	(mWh)	MW	(mTherm*)	2013 Expenses¹
Gas and Electric Customers						
Owners - Total		4,687	2,141	0.2	140	7,265,183
	Single Family	2,995	1,483	0.2	96	\$ 5,210,233
	Multi Family	289	94	0.0	3	\$ 197,050
	Mobile Homes	1,403	564	0.1	41	\$ 1,857,897
Renters - Total		12,258	3,603	0.4	178	7,505,751
	Single Family	5,237	1,790	0.2	110	\$ 4,082,865
	Multi Family	6,918	1,777	0.2	65	\$ 3,345,803
	Mobile Homes	103	37	0.0	3	\$ 77,082
Electric Customers (only)						
Owners - Total		172	144	0	1	143,757
	Single Family	131	118	0.0	1	\$ 116,758
	Multi Family	40	24	0.0	0	\$ 24,930
	Mobile Homes	1	2	0.0	-	\$ 2,068
Renters - Total		451	264	0	1	245,543
	Single Family	161	129	0.0	1	\$ 116,715
	Multi Family	289	135	0.0	0	\$ 128,694
	Mobile Homes	1	0	0.0	-	\$ 134
Gas Customers (only)						
Owners - Total		-	-	-	-	-
	Single Family					
	Multi Family					
	Mobile Homes					
Renters - Total		-	-	-	-	-
	Single Family					
	Multi Family					
	Mobile Homes					
Totals:		17,568	6,153	1	319	15,160,233

Penetration History				
Year	Homes Treated²	Ineligible & Unwilling³	Estimated Eligible in Current Year⁴	Current Year Penetration Rate for Homes Treated
2002	14,089			
2003	15,706			
2004	14,897			
2005	11,254			
2006	13,771			
2007	13,074			
2008	20,804			
2009	20,927	6,685	20,384	103%
2010	21,593	8,690	20,384	106%
2011	22,575	8,423	20,384	111%
2012	22,415	7,871	20,316	110%
2013	17,568	13,411	20,316	86%
2014				
2015				
2016				
2017				
2018				
2019				
2020				
Total Homes Treated since 2002	208,673	45,080	101,784	

¹Excluding indirect program costs.

² Homes treated since 2002 are reported to track progress toward meeting the 2020 Programmatic Initiative.

³ Define Ineligible & Unwilling.

⁴ Based on Attachment F of D.12-08-044.

Year	Utility in Shared Service Territory	Eligible Households in Shared Service Territory	Eligible households treated by both utilities in shared service territory
2013	SoCalGas	17,087	20

San Diego Gas Electric Company

	A	B	C	D	E	F	G
1	PY 2013 Energy Savings Assistance Program Annual Report ESAP Table 5 ESAP Direct Purchases & Installation Contractors						
2	Contractor	County	Contractor Type (Check one or more if applicable)				2013 Annual Expenditures
3			Private	CBO	WMDVBE	LIHEAP	
4	AMERICAN INSULATION INC	San Diego	x		x		\$ 1,561,367
5	AMERIMEX	San Diego	x		x		\$ 196,344
6	CAL-WEST AIR CONDITIONING INC	San Diego	x				\$ 434,500
7	CAMPESINOS UNIDOS INC	San Diego		x	x	x	\$ 318,943
8	CAPITAL STATE CONTRUCTION	San Diego	x				\$ 1,210,930
9	INC	San Diego					\$ 841,306
10	JERRY'S HEATING & AIR CONDITIONING, INC	San Diego	x				\$ 1,029,645
11	JJ HEAT & AIR	San Diego	x				\$ -
12	MAAC PROJECT	San Diego		x	x	x	\$ 661,289
13	R&B WHOLESALE DISTRIBUTOR INC	San Diego	x				\$ 1,936,211
14	RANCHO ENERGY SERVICES	San Diego	x		x		\$ 1,971,138
15	RELIABLE ENERGY MANAGEMENT INC	San Diego			x		\$ 21,395
16	RICHARD HEATH & ASSOCIATES INC	San Diego, Orange	x		x		\$ 4,170,903
17	THA HEATING AND AIR CONDITIONING INC	San Diego	x				\$ 719,918
18	INSPECTIONS LLC	San Diego			x		\$ 61,864
19	ESPINOZAS HEATING & AIR	San Diego	x		x		\$ 24,482
20	Total Contractor Expenditures						\$ 15,160,233

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
1	PY 2013 Energy Savings Assistance Program Annual Report ESAP Table 6 ESAP Installation Cost of Program Installation Contractors																		
2		Unit of Measure	CBO/WMDVBE						Non-CBO/WMDVBE						2013 Program Total				
3			Installations		Dwellings		Costs		Installations		Dwellings		Costs		Units Installed	Households [1]	Costs	Cost/ Unit	Cost/ Household
4			Units	%	Units	%	\$	%	Units	%	Units	%	\$	%					
5	Dwellings	Each	823,628	82%	18,515	73%	8,988,030	59%	185,187	18%	6,959	27%	6,172,204	41%	1,008,815	25,474	\$ 15,160,233	\$ 15.03	\$ 595.13
6	Appliances																		
7	High Efficiency Clothes Washer	Each	-	0%	-	0%	-	0%	848	100%	848	100%	547,775	100%	848	848	547,775	646	646
8	Refrigerators	Each	-	0%	-	0%	-	0%	2,083	100%	2,036	100%	1,386,564	100%	2,083	2,036	1,386,564	666	681
9	Microwaves	Each	2,959	69%	2,962	69%	281,025	69%	1,307	31%	1,307	31%	124,165	31%	4,266	4,269	405,190	95	95
10	Domestic Hot Water																		
11	Water Heater Blanket	Home	457	88%	455	87%	19,882	88%	65	12%	66	13%	2,829	12%	522	521	22,711	44	44
12	Low Flow Shower Head	Home	9,576	68%	6,941	68%	346,166	68%	4,503	32%	3,306	32%	159,586	32%	14,079	10,247	505,752	36	49
13	Water Heater Pipe Insulation	Home	575	37%	148	44%	1,898	37%	997	63%	191	56%	3,290	63%	1,572	339	5,188	3	15
14	Faucet Aerator	Home	14,101	73%	7,085	71%	73,327	73%	5,262	27%	2,925	29%	27,363	27%	19,363	10,010	100,690	5	10
15	Water Heater Repair/Replacement	Each	2,362	74%	811	64%	62,487	23%	836	26%	453	36%	206,350	77%	3,198	1,264	268,837	84	213
16	Thermostatic Shower Valve	Each	2,789	54%	1,997	55%	134,290	54%	2,384	46%	1,665	45%	114,790	46%	5,173	3,662	249,080	48	68
17	Enclosure																		
18	Air Sealing / Envelope	Home	89,403	72%	8,278	67%	2,335,536	71%	35,015	28%	4,112	33%	971,543	29%	124,418	12,390	3,307,079	27	267
19	Attic Insulation	Home	510,762	83%	435	82%	423,217	83%	102,804	17%	94	18%	89,439	17%	613,566	529	512,656	1	969
20	HVAC																		
21	FAU Standing Pilot Light Conversion	Each	40	44%	40	44%	12,000	44%	50	56%	51	56%	15,016	56%	90	91	27,016	300	297
22	Furnace Repair/Replacement	Each	5,173	53%	3,273	71%	417,962	18%	4,632	47%	1,330	29%	1,944,842	82%	9,805	4,603	2,362,804	241	513
23	Room A/C Replacement	Each	214	100%	204	100%	202,870	100%	-	0%	-	0%	-	0%	214	204	202,870	948	994
24	Central A/C Replacement	Each	-	0%	-	0%	-	0%	-	0%	-	0%	-	0%	-	-	-	-	-
25	Heat Pump Replacement	Each	-	0%	-	0%	-	0%	-	0%	-	0%	-	0%	-	-	-	-	-
26	Evaporative Coolers (Replacement)	Each	-	0%	-	0%	-	0%	-	0%	-	0%	-	0%	-	-	-	-	-
27	Evaporative Coolers (Installation)	Each	-	0%	-	0%	-	0%	-	0%	-	0%	-	0%	-	-	-	-	-
28	Duct Testing and Sealing [2]	Home	191	69%	191	69%	17,235	33%	87	31%	87	31%	34,825	67%	278	278	52,059	187	187

San Diego Gas Electric Company

	A	B	C	D	E
1	PY 2013 Energy Savings Assistance Program Annual Report ESAP Table 7 Expenditures Recorded by Cost Element				
2	ESA Program:	Labor	Non-Labor	Contractor	Total
3	Energy Efficiency				
4	Appliances	\$ -	\$ -	\$ 2,339,529	\$ 2,339,529
5	Domestic Hot Water	\$ -	\$ -	\$ 1,152,133	\$ 1,152,133
6	Enclosure	\$ -	\$ -	\$ 3,819,893	\$ 3,819,893
7	HVAC	\$ -	\$ -	\$ 2,644,717	\$ 2,644,717
8	Maintenance	\$ -	\$ -	\$ 342,502	\$ 342,502
9	Lighting	\$ -	\$ -	\$ 1,700,003	\$ 1,700,003
10	Miscellaneous	\$ -	\$ -	\$ 46,795	\$ 46,795
11	Customer Enrollment	\$ -	\$ -	\$ 2,726,782	\$ 2,726,782
12	In Home Education	\$ -	\$ -	\$ 387,880	\$ 387,880
13	Pilot	\$ -	\$ -	\$ -	\$ -
14	Energy Efficiency TOTAL	\$ -	\$ -	\$ 15,160,233	\$ 15,160,233
15					
16	Training Center	\$ -	\$ -	\$ -	\$ -
17	Inspections	\$ 96,939	\$ 624	\$ -	\$ 97,563
18	Marketing and Outreach	\$ 2,043	\$ 737,761	\$ -	\$ 739,804
19	Statewide Marketing Education and Outreach	\$ -	\$ 4,548	\$ -	\$ 4,548
20	Measurement and Evaluation Studies	\$ -	\$ 73,405	\$ -	\$ 73,405
21	Regulatory Compliance	\$ 166,954	\$ 45,449	\$ -	\$ 212,403

San Diego Gas Electric Company

	A	B	C	D	E	F	G	H	I
1	PY 2013 Energy Savings Assistance Program Annual Report ESAP Table 8 ESAP Homes Unwilling / Unable to Participate								
2	Reason Provided								
3	County	Customer/ Landlord Declined Program Measures or is Non- Responsive	Customer Unavailable - Scheduling Conflicts	Hazardous Environment (unsafe/unclean)	Insufficient feasible Measures	Ineligible Dwelling - Prior Program Participation	Household Income Exceeds Allowable Limits	Unable to Provide Required Documentation	Other
4	San Diego	8,972	304	-	76	28	3,197	474	213
5	Orange	62	-	-	-	-	77	7	1
6	Total	9,034	304	-	76	28	3,274	481	214

San Diego Gas Electric Company

	A	B	C	D	E	F	G
1	PY 2013 Energy Savings Assistance Program Annual Report ESAP Table 9 Life Cycle Bill Savings by Measure						
2	Measure Description		2013 Number Installed	Per Measure Electric Impact - Average (kWh)	Per Measure Gas Impact (Therms)	Effective Useful Life (EUL)	2013 Total Measure Life Cycle Bill Savings
3	Appliances						
4	High Efficiency Clothes Washer	Each	848	19	36	14	\$ 237,809
5	Refrigerators	Each	2,083	693	-	15	\$ 1,864,502
6	Microwaves	Each	4,266	29	22	15	\$ 890,872
7	Domestic Hot Water						
8	Water Heater Blanket	Home	521	1	2	5	\$ 2,599
9	Low Flow Shower Head	Home	10,247	1	3	10	\$ 204,876
10	Water Heater Pipe Insulation	Home	339	5	4	15	\$ 12,011
11	Faucet Aerator	Home	10,010	1	2	5	\$ 57,725
12	Water Heater Repair/Replacement	Each	3,198	-	-	13	\$ -
13	Thermostatic Shower Valve	Each	5,173	19	13	10	\$ 454,541
14	Enclosure						
15	Air Sealing / Envelope	Home	12,390	51	3	5	\$ 434,692
16	Attic Insulation	Home	529	98	9	25	\$ 151,637
17	HVAC						
18	FAU Standing Pilot Light Conversion	Each	90	-	42	18	\$ 33,193
19	Furnace Repair/Replacement	Each	4,603	-	-	13	\$ -
20	Room A/C Replacement	Each	214	39	-	15	\$ 10,691
21	Central A/C Replacement	Each	0	-	-	18	\$ -
22	Heat Pump Replacement	Each	0	-	-	13	\$ -
23	Evaporative Coolers (Replacement)	Each	0	-	-	-	\$ -
24	Evaporative Coolers (Installation)	Each	0	-	-	-	\$ -
25	Duct Testing and Sealing	Home	240	-	-	25	\$ -
26	Maintenance						
27	Furnace Clean and Tune	Home	4,886	-	4	13	\$ 122,117
28	Central A/C Tune-up	Home	1	256	-	10	\$ 236
29	Evaporative Cooler Maintenance	Home	0	-	-	3	\$ -
30	Lighting						
31	Compact Fluorescent Lights (CFLs)	Each	87,635	17	-	9	\$ 1,266,684
32	Interior Hard wired CFL fixtures	Each	3,968	39	-	16	\$ 211,720
33	Exterior Hard wired CFL fixtures	Each	2,523	47	-	20	\$ 191,743
34	Torchiere	Each	7,303	191	-	9	\$ 1,175,650
35	Occupancy Sensor	Each	0	-	-	-	\$ -
36	LED Night Lights	Each	47,949	10	-	9	\$ 413,023
37	Miscellaneous						
38	Pool Pumps	Each	0	-	-	-	\$ -
39	Smart Power Strips	Each	1,337	75	-	20	\$ 161,490
40	Pilots						
41	Each						
42							
43	Total Homes Served By the Program						17,568
44	Life Cycle Bill Savings Per Home						\$ 450
45							

San Diego Gas Electric Company

	A	B	C
	PY 2013 Energy Savings Assistance Program Annual Report ESAP Table 10 Energy Rate Used for Bill Savings Calculations¹		
1			
2	Year	\$/kWh	\$/Therm
3	2013	0.11	0.64
4	2014	0.11	0.66
5	2015	0.11	0.68
6	2016	0.12	0.70
7	2017	0.12	0.72
8	2018	0.13	0.74
9	2019	0.13	0.76
10	2020	0.13	0.78
11	2021	0.14	0.81
12	2022	0.14	0.83
13	2023	0.15	0.86
14	2024	0.15	0.88
15	2025	0.15	0.91
16	2026	0.16	0.93
17	2027	0.16	0.96
18	2028	0.17	0.99
19	2029	0.17	1.02
20	2030	0.18	1.05
21	2031	0.18	1.08
22	2032	0.19	1.12
23	2033	0.20	1.15
24	2034	0.20	1.18
25	2035	0.21	1.22
26	2036	0.21	1.26
27	2037	0.22	1.29
28			

San Diego Gas Electric Company

	A	B	C	D	E
1	PY 2013 Energy Savings Assistance Program Annual Report ESAP Table 11 Bill Savings Calculations by Program Year				
2	Program Year	Program Costs	Program Lifecycle Bill Savings	Program Bill Savings/ Cost Ratio	Per Home Average Lifecycle Bill Savings
3	2011	\$ 20,950,509	\$ 11,372,235	0.54	\$ 504
4	2012	\$ 21,046,806	\$ 10,325,509	0.49	\$ 461
5	2013	\$ 17,874,649	\$ 7,897,313	0.58	\$ 450

PY 2013 Energy Savings Assistance Program Annual Report
ESAP Table 12
Fund Shifting

		Budget			Expenditures			(Shift) or Carried Forward (Budget - Expenditures = Variance)			Among Categories within Program Year 1-3			FUND SHIFT AMOUNT Carry Forward from 2012			Carry Back from 2014									
Date ⁵	Program Year 2013	Electric	Gas	Total Authorized	Electric	Gas	Total Expenditures	Variance			(1) Shift of Current Year Authorized			(2) Shift of Carry Forward			(3) Shift of Carry Back			Total Shifted Gas/ Electric ^{1,4}	% of Authorized Total	Fund Shifting Source 1. Current Year Authorized 2. Carried Forward 3. Carried Back	To/From Year	Fund Shift Description	Authorization	
								Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total							
	ESA Program:	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	(\$x,xxx)	x%	Carried Forward	From 2008	From In-Home Energy Education	G-xxxx, D xx- xx-xxx	
	Energy Efficiency																									
	Appliance	\$ 3,703,271	\$ 891,923	\$ 4,595,194	\$ 1,791,754	\$ 547,775	\$ 2,339,529	\$ 1,911,517	\$ 344,148	\$ 2,255,665	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.	
	Domestic Hot Water	\$ 48,473	\$ 1,579,959	\$ 1,628,432	\$ 34,564	\$ 1,117,569	\$ 1,152,133	\$ 13,909	\$ 462,390	\$ 476,299	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.	
November 2013	Enclosure	\$ 1,424,793	\$ 1,855,723	\$ 3,280,516	\$ 1,642,554	\$ 2,177,339	\$ 3,819,893	\$ (217,761)	\$ (321,616)	\$ (539,377)	\$ -	\$ -	\$ -	\$ 217,761	\$ 321,616	\$ 539,377	\$ -	\$ -	\$ -	\$ 539,377	1.76% Electric 3.29% Gas	1. 2. Carried Forward 3.	1. 2. From 2012 3.	1. 2. From 2012 & prior years carried forward unspent funds. 3.	1. 2. Authorized by D.08-11-031, as modified by D.10-10-008, and D.12-08-044. 3.	
June 2013	HVAC	\$ 380,775	\$ 1,272,768	\$ 1,653,543	\$ 202,870	\$ 2,441,848	\$ 2,644,717	\$ 177,905	\$ (1,169,080)	\$ (991,174)	\$ -	\$ -	\$ -	\$ -	\$ 1,169,080	\$ 1,169,080	\$ -	\$ -	\$ -	\$ 1,169,080	11.95% Gas	1. 2. Carried Forward 3.	1. 2. From 2012 3.	1. 2. From 2012 & prior years carried forward unspent funds. 3.	1. 2. Authorized by D.08-11-031, as modified by D.10-10-008, and D.12-08-044. 3.	
	Maintenance	\$ 4,334	\$ 549,917	\$ 554,251	\$ 125	\$ 342,377	\$ 342,502	\$ 4,209	\$ 207,540	\$ 211,749	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.	
	Lighting	\$ 2,694,452	\$ -	\$ 2,694,452	\$ 1,700,003	\$ -	\$ 1,700,003	\$ 994,449	\$ -	\$ 994,449	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.	
	Miscellaneous	\$ 470,826	\$ -	\$ 470,826	\$ 46,795	\$ -	\$ 46,795	\$ 424,031	\$ -	\$ 424,031	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.	
	Customer Enrollment	\$ 1,592,991	\$ 1,592,991	\$ 3,185,982	\$ 1,363,391	\$ 1,363,391	\$ 2,726,782	\$ 229,600	\$ 229,600	\$ 459,200	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.	
	In Home Education	\$ 208,900	\$ 208,900	\$ 417,800	\$ 193,940	\$ 193,940	\$ 387,880	\$ 14,960	\$ 14,960	\$ 29,920	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.	
	Pilot	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.	
	Energy Efficiency TOTAL	\$ 10,528,815	\$ 7,952,181	\$ 18,480,996	\$ 6,975,995	\$ 8,184,238	\$ 15,160,233	\$ 3,552,820	\$ (232,057)	\$ 3,320,763	\$ -	\$ -	\$ -	\$ 217,761	\$ 1,490,696	\$ 1,708,457	\$ -	\$ -	\$ -	\$ 1,708,457						
	Training Center	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.	
July 2013	Inspections	\$ 28,738	\$ 28,738	\$ 57,475	\$ 48,782	\$ 48,781	\$ 97,563	\$ (20,044)	\$ (20,044)	\$ (40,088)	\$ -	\$ -	\$ -	\$ 20,044	\$ 20,044	\$ 40,088	\$ -	\$ -	\$ -	\$ 40,088	0.16% Electric 0.20% Gas	1. 2. Carried Forward 3.	1. 2. From 2012 3.	1. 2. From 2012 & prior years carried forward unspent funds. 3.	1. 2. Authorized by D.08-11-031, as modified by D.10-10-008, and D.12-08-044. 3.	
	Marketing and Outreach	\$ 576,870	\$ 576,870	\$ 1,153,740	\$ 369,902	\$ 369,902	\$ 739,804	\$ 206,968	\$ 206,968	\$ 413,936	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.	
	Statewide ME&O ²	\$ 30,000	\$ 30,000	\$ 60,000	\$ 2,274	\$ 2,274	\$ 4,548	\$ 27,726	\$ 27,726	\$ 55,452	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.	
March 2013	M&E Studies ^{2,3}	\$ 27,500	\$ 27,500	\$ 55,000	\$ 36,702	\$ 36,702	\$ 73,405	\$ (9,202)	\$ (9,202)	\$ (18,405)	\$ -	\$ -	\$ -	\$ 9,202	\$ 9,202	\$ 18,404	\$ -	\$ -	\$ -	\$ 18,404	0.07% Electric 0.09% Gas	1. 2. Carried Forward 3.	1. 2. From 2012 3.	1. 2. From 2012 & prior years carried forward unspent funds. 3.	1. 2. Authorized by D.08-11-031, as modified by D.10-10-008, and D.12-08-044. 3.	
	Regulatory Compliance ²	\$ 169,692	\$ 169,692	\$ 339,384	\$ 106,202	\$ 106,201	\$ 212,403	\$ 63,490	\$ 63,491	\$ 126,981	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.	
	General Administration ²	\$ 974,474	\$ 974,474	\$ 1,948,947	\$ 789,785	\$ 789,788	\$ 1,579,573	\$ 184,688	\$ 184,686	\$ 369,374	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.	
	CPUC Energy Division ²	\$ 22,500	\$ 22,500	\$ 45,000	\$ 3,560	\$ 3,560	\$ 7,119	\$ 18,940	\$ 18,940	\$ 37,881	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.	
	TOTAL PROGRAM COSTS	\$ 12,358,588	\$ 9,781,954	\$ 22,140,542	\$ 8,333,202	\$ 9,541,446	\$ 17,874,649	\$ 4,025,386	\$ 240,508	\$ 4,265,893	\$ -	\$ -	\$ -	\$ 247,007	\$ 1,519,942	\$ 1,766,949	\$ -	\$ -	\$ -	\$ 1,766,949						
	Carry Forward from Prior Years \$8,580,108	\$ 3,110,703	\$ 5,469,406	\$ 8,580,108				\$ 3,110,703	\$ 5,469,406	\$ 8,580,108				\$ 3,110,703	\$ 5,469,406	\$ 8,580,108										
	Carry Back from PY 2014 (\$0)	\$ -	\$ -	\$ -				\$ -	\$ -	\$ -																
	TOTAL PROGRAM INCLUDING CARRY FORWARD / CARRY BACK	\$ 15,469,291	\$ 15,251,360	\$ 30,720,650	\$ 8,333,202	\$ 9,541,446	\$ 17,874,649	\$ 7,136,088	\$ 5,709,913	\$ 12,846,001	\$ -	\$ -	\$ -	\$ 2,863,696	\$ 3,949,464	\$ 6,813,159	\$ -	\$ -	\$ -							

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

2) Prior written authorization from the Commission is required before the utilities can shift into or out of these categories.

3) Joint IOUs contracted four statewide studies (Load Impact Evaluation, Needs Assessment, Multi-Family Segment, Energy Education Assessment) over the 2012-2014 low income program cycle. SDG&E was the lead administrator of the Load Impact Evaluation study and the other IOUs were invoiced for this study. However, SDG&E has yet to be invoiced for the other three studies but anticipates being invoiced in 2014.

4) SDG&E shifted funds in accordance with Section 20 of Funding Shifting Rules set forth in D.08-11-031, as modified by D.10-10-008, and D.12-08-044.

5) This is the month in which the category was over budget. However, SDG&E did not shift any funds until year end 2013.

Total Carry Forward 2012 unspent funds	\$ 3,110,703	\$ 5,469,406	\$ 8,580,108
Total Shifted during 2013	\$ 247,007	\$ 1,519,942	\$ 1,766,949
Remaining Carryforward from 2012 after fund shift for 2013	\$ 2,863,696	\$ 3,949,464	\$ 6,813,159
Footnote 2 Totals not available for fund shift w/out prior written authorization	\$ 294,845	\$ 294,843	\$ 589,688
2013 Unspent Funds	\$ 3,977,548	\$ 1,465,607	\$ 5,443,154
Total Unspent Funds Carry forward into 2014	\$ 7,136,088	\$ 5,709,913	\$ 12,846,001

San Diego Gas Electric Company

	A	B
1	PY 2013 Energy Savings Assistance Program Annual Report ESAP Table 13 Categorical and Other Enrollment	
2		
3		
4		
5		
6	Type of Enrollment	Number of customers treated
7	Women, Infants, and Children Program (WIC)	10
8	Supplemental Security Income (SSI)	4
9	CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	3
10	CalWORKs/Temporary Assistance for Needy Families (TANF)	-
11	Tribal TANF	-
12	Medicaid/Medi-Cal for Families	2
13	Healthy Families A&B	2
14	National School Lunch Program (NSLP) - Free Lunch	1
15	Low-income Home Energy Assistance Program (LIHEAP)	-
16	Bureau of Indian Affairs General Assistance	-
17	Head Start Income Eligible - (Tribal Only)	-
18	Self Certification	11,047
19	Standard Enrollment	6,499
20	Total	17,568
21		
22		
23		

San Diego Gas Electric Company

**PY 2013 Energy Savings Assistance Program Annual Report
ESAP Table 14
Leveraging & Integration**

Coordination Type [1]	Partner	Brief Description of Effort	Relationship outside the IOU?	MOU Present?	Amount of Dollars Saved [2]	Amount of Energy Savings [3]	Other Measureable Benefits [3]	Enrollments Resulting from Leveraging Effort [4]	Methodology [5]	Meets all Criteria	If not, Explain
Leveraging	N/A	No enrollments resulted in leveraging activity	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Interdepartmental Integration	CARE	CARE/ESA Program combined message in all marketing material	No	N/A	None	N/A	N/A	N/A	No dollar impact. Integration effort was designed to increase awareness	N/A	N/A
Data Sharing	EUC MIDI Program	Lead Sharing between ESA Program and MIDI	No	N/A	N/A - Due to small number of enrollments.	1,672 kWh, .2 kW and 6.87 therms (annual savings)	N/A	1	N/A	Y	N/A
Data Sharing	CARE/Medical Baseline	Marketing to customers enrolled in CARE and/or Medical Baseline	No	N/A	None	N/A	N/A	N/A	No dollar impact. Effort provided targeted lead generation	N/A	N/A

[1] Leveraging, Interdepartmental integration, Program Coordination, Data Sharing, ME&O, etc.

[2] Leveraging and Integration efforts are measurable and quantifiable in terms of dollars saved by the IOU (Shared/contributed/donated resources, shared marketing materials, shared information technology, shared programmatic infrastructure, among others are just some examples of cost and/or resource savings to the IOU).

[3] Energy savings/benefits. Leveraging efforts are measurable and quantifiable in terms of home energy benefits/ savings to the eligible households.

[4] Enrollment increases. Leveraging efforts are measurable and quantifiable in terms of program enrollment increases and/or customers served.

[5] In footnotes, provide information on methodology used to calculate cost and/or resource savings.

San Diego Gas Electric Company

	A	B	C	D	E	F
1	PY 2013 Energy Savings Assistance Program Annual Report					
2	ESAP Table 15					
3	Lighting					
4						
5	ESA Program CFL Tracking Table					
6	<i>Instructions: Please identify the CFL bulbs used within your ESA 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) [1]	AB 1109 Compliant? [2]
8	CFL	14 Watt			6.90	Yes
9	CFL	15 Watt			9.86	Yes
10	CFL	19 Watt			6.90	Yes
11	CFL	20 Watt			6.90	Yes
12	CFL	23 Watt			6.90	Yes
13	3-Way CFL	23 Watt			6.90	Yes
14						
15						
16						
17	Year	Number of Homes Treated in ESA Program	Number of Homes Provided CFLs	Avg. # of CFL bulbs given per home	Est. total energy savings from installed CFLs [3]	
18	2009	20,927	17,653	6	1,796,496	
19	2010	21,593	17,016	7	1,796,176	
20	2011	22,575	17,246	6	1,697,568	
21	2012	22,415	17,046	6	1,772,269	
22	2013	17,568	11,639	6	1,502,883	
23						
24	¹ Bulb cost and admin cost were combined effective 2013.					
25						
26	² Compliant in regards to: 1) Do bulbs meet or exceed CEC energy efficiency standards for general purpose lighting?					
27	Do all models comply with Europe's RoHS standards on toxicity?					
28						
29	³ Energy savings used are from the Load Impact Evaluation of the 2009 Energy Savings Assistance Program.					

San Diego Gas Electric Company

	A	B	C	D	E	F	G	H
1	PY 2013 Energy Savings Assistance Program Annual Report							
2	ESAP Table 16							
3	"Add Back" Measures							
4								
5			Ratio of Benefits Over Costs					
6	Measure [1]	Climate Zone	Utility Cost Test	Modified Participant Test	Total Resource Cost Test	Quantity Installed	Budget Impact of "Add Back"	First Year Energy Bill Savings Impact
7	Room A/C Replacement, MF	10	0.13	0.10	0.11	120	\$121,897	\$516
8	Room A/C Replacement, MH	10	0.15	0.12	0.14	30	\$24,477	\$129
9	Room A/C Replacement, SF	10	0.14	0.11	0.13	64	\$56,495	\$275
10	Duct Testing and Sealing, elec, SF	7	0.00	0.00	0.00	1	\$600	\$0
11	Duct Testing and Sealing, elec, SF	10	0.00	0.00	0.00	1	\$88	\$0
12	Duct Testing and Sealing, gas, MF	10	0.00	0.00	0.00	1	\$600	\$0
13	Duct Testing and Sealing, gas, MH	7	0.00	0.00	0.00	6	\$3,600	\$0
14	Duct Testing and Sealing, gas, MH	10	0.00	0.00	0.00	14	\$8,600	\$0
15	Duct Testing and Sealing, gas, SF	7	0.00	0.00	0.00	95	\$15,211	\$0
16	Duct Testing and Sealing, gas, SF	10	0.00	0.00	0.00	122	\$23,360	\$0
17	Furnace Repair/Replacement, gas, MF	7	0.00	0.00	0.00	541	\$35,335	\$0
18	Furnace Repair/Replacement, gas, MF	10	0.00	0.00	0.00	219	\$17,246	\$0
19	Furnace Repair/Replacement, gas, MH	7	0.00	0.00	0.00	765	\$284,565	\$0
20	Furnace Repair/Replacement, gas, MH	10	0.00	0.00	0.00	1,084	\$382,309	\$0
21	Furnace Repair/Replacement, gas, MH	15	0.00	0.00	0.00	4	\$2,323	\$0
22	Furnace Repair/Replacement, gas, SF	7	0.00	0.00	0.00	3,493	\$805,723	\$0
23	Furnace Repair/Replacement, gas, SF	10	0.00	0.00	0.00	3,652	\$822,262	\$0
24	Water Heater Repair/Replacement, gas, MF	7	0.00	0.00	0.00	80	\$2,599	\$0
25	Water Heater Repair/Replacement, gas, MF	10	0.00	0.00	0.00	66	\$4,064	\$0
26	Water Heater Repair/Replacement, gas, MH	7	0.00	0.00	0.00	105	\$38,262	\$0
27	Water Heater Repair/Replacement, gas, MH	10	0.00	0.00	0.00	167	\$46,426	\$0
28	Water Heater Repair/Replacement, gas, SF	7	0.00	0.00	0.00	1,515	\$87,932	\$0
29	Water Heater Repair/Replacement, gas, SF	10	0.00	0.00	0.00	1,255	\$89,236	\$0
30								
31	[1] Based on Appendix J.1 and J.2 in D.12-08-044 and Ordering Paragraphs 43, 47, and 50 of D.12-08-044.							
32	[2] For Duct testing and sealing, it represents 190 test in the amount of \$16,634 and 88 homes sealed in the amount of \$35,425. Of this, 38 homes received both test and seal.							
33	There are no energy savings associated with duct testing.							

San Diego Gas Electric Company

	A	B	C	D	E	F	G	H
1	<p style="text-align: center;">PY 2013 CARE Annual Report</p> <p style="text-align: center;">CARE Table 1</p> <p style="text-align: center;">Overall Program Expenses</p>							
2								
3								
4	Category	Overall Expenditures		Total	Authorized Budget	% of Budget Spent	Total Shifted ^[1]	Shifted to/from?
5		Electric	Gas					
6	Outreach	\$1,565,543	\$362,166	\$1,927,709	\$2,283,170	84%		
7	Processing, Certification, Recertification	\$210,660	\$48,803	\$259,463	\$636,188	41%		
8	Post Enrollment Verification	\$126,642	\$29,377	\$156,019	\$403,200	39%		
9	IT Programming	\$384,676	\$89,575	\$474,251	\$1,224,036	39%		
10	Cool Centers	\$19,389	\$4,847	\$24,236	\$34,329	71%		
11	Pilots ^[2]	\$82,675	\$19,040	\$101,715	\$108,000	94%		
12	Measurement & Evaluation	\$30,742	\$7,211	\$37,953	\$42,500	89%		
13	Regulatory Compliance	\$83,256	\$19,172	\$102,428	\$160,136	64%		
14	General Administration	\$287,268	\$66,117	\$353,385	\$505,430	70%		
15	CPUC Energy Division	\$13,482	\$3,130	\$16,612	\$53,002	31%		
16								
17	TOTAL Program Costs	\$2,804,333	\$649,438	\$3,453,771	\$5,449,991	63%		
18								
19	CARE Rate Discount	\$51,018,950	\$13,060,690	\$64,079,640	\$82,630,988	78%		
20	Service Establishment Charge Discount	\$0	\$0	\$0	\$0	0%		
21								
22	TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	\$53,823,283	\$13,710,128	\$67,533,411	\$88,080,979	77%		
23								
24	[1] Explain fund shifting details							
25	[2] CHANGES Pilot							
26								
27								

San Diego Gas Electric Company

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y
1	PY 2013 CARE Annual Report																								
2	CARE Table 2																								
3	Enrollment, Recertification, Attrition, & Penetration																								
4		New Enrollment									Recertification				Attrition					Enrollment		Total CARE Participants	Estimated CARE Eligible	Penetration Rate % (W/X)	
5		Automatic Enrollment			Self-Certification (Income or Categorical)				Capitation	Total New Enrollment (E+I+J)	Scheduled	Non- Scheduled (Duplicates)	Automatic	Total Recertification (L+M+N)	No Response	Failed PEV	Failed Recertification	Other ⁴	Total Attrition (P+Q+R+S)	Gross (K+O)	Net Adjusted (K-T)				
6		Inter-Utility ¹	Intra-Utility ²	Leveraging ³	Combined (B+C+D)	Online	Paper	Phone																	Combined (F+G+H)
7	January	2	166	0	168	1,767	2,407	694	4,868	348	5,384	2,239	1,822	3,799	7,860	1,852	85	113	2,856	4,906	13,244	478	310,083	352,657	88%
8	February	0	103	3	106	1,134	1,821	532	3,487	217	3,810	2,983	1,629	3,420	8,032	1,096	93	97	2,914	4,200	11,842	-390	309,693	352,657	88%
9	March	0	138	1	139	1,481	2,291	594	4,366	295	4,800	3,005	1,957	4,149	9,111	1,443	145	118	3,010	4,716	13,911	84	309,777	352,657	88%
10	April	0	168	14	182	1,258	2,516	936	4,710	299	5,191	2,816	1,313	3,675	7,804	1,092	144	102	5,087	6,425	12,995	-1,234	308,543	353,010	87%
11	May	0	188	11	199	1,035	2,369	406	3,810	356	4,365	2,693	1,753	5,821	10,267	1,742	156	80	3,088	5,066	14,632	-701	307,842	353,010	87%
12	June	116	203	0	319	908	1,848	379	3,135	334	3,788	3,029	703	4,250	7,982	2,408	88	124	3,815	6,435	11,770	-2,647	305,195	353,010	86%
13	July	0	69	14	83	1,151	1,702	184	3,037	426	3,546	1,994	529	3,992	6,515	1,549	59	74	5,958	7,640	10,061	-4,094	301,101	353,422	85%
14	August	0	133	14	147	1,694	3,254	142	5,090	541	5,778	2,322	1,060	4,871	8,253	1,531	98	59	3,714	5,402	14,031	376	301,477	353,422	85%
15	September	0	87	0	87	2,165	2,455	125	4,745	684	5,516	2,801	900	3,848	7,549	1,929	81	77	4,059	6,146	13,065	-630	300,847	353,422	85%
16	October	0	221	73	294	2,441	3,470	218	6,129	737	7,160	3,796	1,626	5,857	11,279	804	98	104	3,326	4,332	18,439	2,828	303,675	353,997	86%
17	November	48	217	7	272	1,142	2,128	190	3,460	494	4,226	3,695	1,724	4,457	9,876	1,206	106	133	3,491	4,936	14,102	-710	302,965	353,997	86%
18	December	0	284	2	286	1,175	1,650	327	3,152	518	3,956	2,629	1,412	3,778	7,819	1,898	79	76	4,314	6,367	11,775	-2,411	300,554	353,997	85%
19	YTD Total	166	1,977	139	2,282	17,351	27,911	4,727	49,989	5,249	57,520	34,002	16,428	51,917	102,347	18,550	1,232	1,157	45,632	66,571	159,867	-9,051	300,554	353,997	85%
20																									

San Diego Gas Electric Company

CARE Table 3A - Post-Enrollment Verification Results (Model) 2013								
2013	Total CARE Households Enrolled	Households Requested to Verify ¹	% of CARE Enrolled Requested to Verify	CARE Households De-Enrolled (Due to no response)	CARE Households De-Enrolled (Verified as Ineligible) ¹	Total Households De-Enrolled ²	% De-enrolled through Post Enrollment Verification ³	% of Total CARE Households De-Enrolled
January	310,083	1,180	0.38%	547	173	720	61.02%	0.23%
February	309,693	1,058	0.34%	497	148	645	60.96%	0.21%
March	309,777	1,192	0.38%	557	193	750	62.92%	0.24%
April	308,543	1,157	0.37%	589	159	748	64.65%	0.24%
May	307,842	293	0.10%	158	51	209	71.33%	0.07%
June	305,195	869	0.28%	482	146	628	72.27%	0.21%
July	301,101	776	0.26%	415	139	554	71.39%	0.18%
August	301,477	296	0.10%	161	61	222	75.00%	0.07%
September	300,847	1,028	0.34%	602	147	749	72.86%	0.25%
October	303,675	1,007	0.33%	598	135	733	72.79%	0.24%
November	302,965	3,178	1.05%	1,983	422	2,405	75.68%	0.79%
December	300,554	2,258	0.75%	1,448	242	1,690	74.84%	0.56%
YTD Total	300,554	14,292	4.76%	8,037	2,016	10,053	70.34%	3.34%

¹ Participants were randomly selected for verification process through the SDG&E probability model and customers who failed the SDG&E's CARE eligibility 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. Includes customers verified as over income or who requested to be de-enrolled.

³ Percentage of customers dropped compared to the total participants requested to verify in that month.

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

CARE Table 3B - Post-Enrollment Verification Results (High Usage)								
2013								
2013	Total CARE Households Enrolled	Households Requested to Verify	% of CARE Enrolled Requested to Verify	CARE Households De-Enrolled (Due to no response)	CARE Households De-Enrolled (Verified as Ineligible) ¹	Total Households De-Enrolled ²	% De-enrolled through Post Enrollment Verification	% of Total CARE Households De-Enrolled
January	310,083	0	0.00%	0	0	0	0	0.00%
February	309,693	0	0.00%	0	0	0	0	0.00%
March	309,777	0	0.00%	0	0	0	0	0.00%
April	308,543	0	0.00%	0	0	0	0	0.00%
May	307,842	0	0.00%	0	0	0	0	0.00%
June	305,195	33	0.01%	25	6	31	93.94%	0.01%
July	301,101	0	0.00%	0	0	0	0.00%	0.00%
August	301,477	50	0.02%	32	12	44	88.00%	0.01%
September	300,847	0	0.00%	0	0	0	0.00%	0.00%
October	303,675	87	0.03%	71	12	83	95.40%	0.03%
November	302,965	212	0.07%	163	39	202	95.28%	0.07%
December	300,554	0	0.00%	0	0	0	0.00%	0.00%
YTD Total	300,554	382	0.13%	291	69	360	94.24%	0.12%

San Diego Gas Electric Company

	A	B	C	D	E	F	G
1	PY 2013 CARE Annual Report						
2	CARE Table 4						
3	CARE Self-Certification and Self-Recertification Applications						
4		Provided	Received	Approved	Denied	Pending/ Never Completed	Duplicates
5	Total	922,952	123,809	107,950	5,847	214	9,758
6	Percentage		13.41%	87.19%	4.72%	0.17%	7.88%

San Diego Gas Electric Company

	A	B	C	D	E	F	G	H	I	J
1	PY 2013 CARE Annual Report									
2	CARE Table 5									
3	CARE Enrollment by County									
4	County	Estimated Eligible			Total Participants			Penetration Rate		
5		Urban	Rural ¹	Total	Urban	Rural	Total	Urban	Rural	Total
6	Orange	17,427	0	17,427	12,584	0	12,584	72%	0%	72%
7	San Diego	328,299	8,272	336,571	281,605	6,365	287,970	86%	77%	86%
8	Total									
9	Total	345,726	8,272	353,998	294,189	6,365	300,554	85%	77%	85%
10	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.									
11										
12										
13										
14										
15										

San Diego Gas Electric Company

	A	B	C	D	E	F	G	H
1	PY 2013 CARE Annual Report CARE Table 6 CARE Recertification Results							
2								
3								
4	2013	Total CARE Population	Participants Requested to Recertify ¹	% of Population Total	Participants Recertified ²	Participants Dropped ^{2,3}	Recertification Rate % (E/C) ⁴	% of Total Population Dropped (F/B)
5	January	310,083	3,373	1.09%	1,991	1,235	59.03%	0.40%
6	February	309,693	3,521	1.14%	2,103	1,289	59.73%	0.42%
7	March	309,777	4,104	1.32%	2,657	1,296	64.74%	0.42%
8	April	308,543	3,892	1.26%	2,414	1,362	62.02%	0.44%
9	May	307,842	2,955	0.96%	1,697	1,165	57.43%	0.38%
10	June	305,195	4,483	1.47%	2,563	1,769	57.17%	0.58%
11	July	301,101	4,659	1.55%	2,978	1,525	63.92%	0.51%
12	August	301,477	5,036	1.67%	3,169	1,696	62.93%	0.56%
13	September	300,847	4,307	1.43%	2,702	1,459	62.74%	0.48%
14	October	303,675	6,264	2.06%	3,823	2,270	61.03%	0.75%
15	November	302,965	4,631	1.53%	2,788	1,709	60.20%	0.56%
16	December	300,554	4,946	1.65%	2,752	2,035	55.64%	0.68%
17	YTD Total	300,554	52,171	17.36%	31,637	18,810	60.64%	6.26%
18	¹ Participants were randomly selected for recertification process and customers who failed the SDG&E's CARE eligibility probability model. Participants recertified number does not include customers who passed the SDG&E's CARE eligible probability model. 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.							
19								
20								
21								

San Diego Gas Electric Company

	A	B	C	D	E	F	G	H
1	PY 2013 CARE Annual Report CARE Table 7 CARE Capitation Contractors							
2								
3								
4	Contractor Name ¹	Contractor Type (Check one or more if applicable)				Enrollments		
5		Private	CBO	WMDVBE	LIHEAP	Rural	Urban	Total
6	211 Phone Enrollment	0	X	0	0	0	4,110	4,110
7	African Alliance	0	X	0	0	0	3	3
8	American Red Cross	0	X	0	0	0	321	321
9	Catholic Charities	0	X	0	0	0	38	38
10	Children's Initiative	0	X	0	0	0	2	2
11	Chula Vista Community Collaborative	0	X	0	0	0	20	20
12	Community Resource Center	0	X	0	0	0	15	15
13	Crisis House	0	X	0	0	0	5	5
14	Deaf Community Services	0	X	0	0	0	0	0
15	Feeding American San Diego	0	X	0	0	0	1	1
16	Foster Lift	0	X	0	0	0	13	13
17	Hearts and Hands Together	0	X	0	0	0	10	10
18	Horn of Africa	0	X	0	0	0	0	0
19	Interfaith Community Services	0	X	0	0	0	15	15
20	MAAC Project	0	X	0	0	0	140	140
21	National Asian American Coalition	0	X	0	0	0	3	3
22	Neighborhood Health Care	0	X	0	0	0	53	53
23	Network of Myanmar American Association	0	X	0	0	0	0	0
24	North County Health Project	0	X	0	0	0	81	81
25	San Diego Food Bank	0	X	0	0	0	1	1
26	San Diego State University - WIC	0	X	0	0	0	280	280
27	SAY San Diego	0	X	0	0	0	0	0
28	Scripps Health - WIC	0	X	0	0	0	36	36
29	Servicentro San Clemente, Inc.	X	0	0	0	0	83	83
30	Somali Family Service of San Diego	0	X	0	0	0	0	0
31	Vista Community Clinic	0	X	0	0	0	15	15
32	YMCA Youth	0	X	0	0	0	5	5
33	Total Enrollments and Expenditures					0	5,250	5,250
34								

San Diego Gas Electric Company

	A	B	C	D	E	F	G	H
1	PY 2013 CARE Annual Report							
2	CARE Table 8							
3	CARE Participants as of Month-End							
4	2013	Gas and Electric	Gas Only	Electric Only	Total	Eligible Households	Penetration Rate	% Change
5	January	208,779	N/A	101,304	310,083	352,657	88%	0.2%
6	February	208,481	N/A	101,212	309,693	352,657	88%	-0.1%
7	March	208,528	N/A	101,249	309,777	352,657	88%	0.0%
8	April	207,672	N/A	100,871	308,543	353,010	87%	-0.4%
9	May	207,228	N/A	100,614	307,842	353,010	87%	-0.2%
10	June	205,341	N/A	99,854	305,195	353,010	86%	-0.9%
11	July	202,871	N/A	98,230	301,101	353,422	85%	-1.3%
12	August	202,961	N/A	98,516	301,477	353,422	85%	0.1%
13	September	202,147	N/A	98,700	300,847	353,422	85%	-0.2%
14	October	203,970	N/A	99,705	303,675	353,997	86%	0.9%
15	November	203,296	N/A	99,669	302,965	353,997	86%	-0.2%
16	December	201,671	N/A	98,883	300,554	353,997	85%	-0.8%

San Diego Gas Electric Company

	A	B	C	D
1	PY 2013 CARE Annual Report			
2	CARE Table 9			
3	CARE Average Monthly Usage & Bill			
4				
5	Average Monthly Gas / Electric Usage			
6	Residential Non-CARE vs. CARE Customers			
7	Customer	Gas Therms	Gas Therms	Total
8		Tier 1	Tier 2	
9	Non-CARE	25.9	1.6	27.5
10	CARE	23.7	0.8	24.4
11	Customer	Electric KWh	Electric KWh	Total
12		Tier 1	Tier 2 and Above	
13	Non-CARE	274	219	493
14	CARE	279	146	425
15				
16				
17	Average Monthly Gas / Electric Bill²			
18	Residential Non-CARE vs. CARE Customers¹			
19	(Dollars per Customer)			
20	Customer	Gas	Electric	
21	Non-CARE	\$32.15	\$99.95	
22	CARE	\$22.37	\$50.93	
23				
24				
25	1 Excludes master-meter usage.			
26	2 Average Monthly Gas/Electric Bill reflects residential Non-CARE (CARE) 2013 total billed revenues divided by the average number of Non-CARE (CARE) 2013 monthly bills.			
27				

San Diego Gas Electric Company

	A	B	C	D	E	F
1	PY 2013 CARE Annual Report					
2	CARE Table 10					
3	CARE Surcharge & Revenue					
4						
5	Electric					
6	CARE Surcharge and Revenue Collected by Customer Class					
7	Class	CARE Surcharge*	Monthly Bill	as Percent of Bill	Collected	Revenue Collected
8	Residential	\$1.51	\$98	1.50%	\$17,348,626	31.62%
9	Commercial	\$13.30	\$659	2.00%	\$23,216,727	42.31%
10	Agricultural	\$21.55	\$1,021	2.10%	\$1,008,821	1.84%
11	Large/Indust	\$1,637.50	\$45,040	3.60%	\$13,294,822	24.23%
12						
13						
14						
15	GAS					
16	CARE Surcharge and Revenue Collected by Customer Class					
17	Customer	Average Monthly		CARE Surcharge	Total CARE Surcharge Revenue	Percentage of CARE Surcharge
18						
19	Class	CARE Surcharge*	Monthly Bill	as Percent of Bill	Collected	Revenue Collected
20	Residential	\$0.80	\$30	2.60%	\$5,971,299	47.18%
21	Commercial	\$14.08	\$284	5.00%	\$5,072,755	40.09%
22	Natural Gas Vehicle	\$1,026.14	\$9,271	11.10%	\$381,724	3.02%
23	Industrial	\$1,861.56	\$6,720	27.70%	\$1,228,632	9.71%
24						

San Diego Gas Electric Company

	A	B	C	D	E	F
1	PY 2013 CARE Annual Report					
2	CARE Table 11					
3	CARE Capitation Applications					
4	Entity	Total Received	Approved	Denied	Pending/ Never Completed	Duplicate
5	211 Phone Enrollment	5,738	5,043	190	0	505
6	African Alliance	8	8	0	0	0
7	American Red Cross	610	437	56	0	117
8	Catholic Charities	269	148	19	0	102
9	Children's Initiative	4	3	0	0	1
10	Chula Vista Community Collaborative	48	34	0	0	14
11	Community Resource Center	49	43	3	0	3
12	Crisis House	31	24	0	0	7
13	Deaf Community Services	0	0	0	0	0
14	Feeding American San Diego	1	1	0	0	0
15	Foster Lift	24	19	0	0	5
16	Hearts and Hands Together	54	46	2	0	6
17	Horn of Africa	46	41	1	0	4
18	Interfaith Community Services	30	29	0	0	1
19	La Maestra Family Clinic	60	34	4	0	22
20	MAAC Project	325	232	12	0	81
21	National Asian American Coalition	9	5	0	0	4
22	Neighborhood Health Care	153	100	4	0	49
23	Network of Myanmar American Association	1	0	0	0	1
24	North County Health Project	216	159	10	0	47
25	San Diego Food Bank	1	1	0	0	0
26	San Diego State University - WIC	559	432	31	0	96
27	SAY San Diego	2	1	0	0	1
28	Scripps Health - WIC	58	44	2	0	12
29	Servicentro San Clemente, Inc.	106	89	6	0	11
30	Somali Family Service of San Diego	0	0	0	0	0
31	Vista Community Clinic	48	33	5	0	10
32	YMCA Youth	13	8	2	0	3
33	Total	8,463	7,014	347	0	1,102

San Diego Gas Electric Company

	A	B	C	D	E	F	G
1	PY 2013 CARE Annual Report						
2	CARE Table 12						
3	CARE Expansion Program						
4							
5	Participating Facilities by Month						
6	2013	Gas			Electric		
		CARE Residential Facilities	CARE Commercial Facilities	Total Gas	CARE Residential Facilities	CARE Commercial Facilities	Total Electric
7							
8	January	282	142	424	474	208	682
9	February	284	142	426	469	208	677
10	March	286	142	428	459	208	667
11	April	283	142	425	444	208	652
12	May	285	142	427	436	207	643
13	June	282	141	423	437	208	645
14	July	280	145	425	447	208	655
15	August	277	146	423	455	208	663
16	September	277	146	423	462	208	670
17	October	278	146	424	470	209	679
18	November	280	147	427	471	211	682
19	December	282	147	429	488	211	699
20							
21							
22	Average Monthly Gas / Electric Usage ¹						
23	Customer	Gas	Electric				
24		Therms	KWh				
25	Residential Facilities	40	527				
26	Commercial Facilities	381	7,529				
27							
28							
29	CARE Expansion Self-Certification and Self-Recertification Applications						
30		Received	Approved	Denied	Pending/Never Completed	Duplicates	
31	Total	139	133	0	0	6	
32	Percentage		95.68%	0.00%	0.00%	4.51%	
33							
34							
35	¹ Excludes master meter usage.						

San Diego Gas Electric Company

	A	B	C	D	E	F	G	H	I	J
1	PY 2013 CARE Annual Report									
2	CARE Table 13									
3	CARE High Usage Verification Results									
4										
5	Stage 1 - IRS Documentation and ESA Agreement				Stage 2 - ESA Participation			Stage 3 - Usage Monitoring		
6	Households Requested to Verify	Removed (No Response)	Removed (Verified Ineligible) ¹	Income Verified and Referred to ESA	Failed and Removed ²	Ineligible ³	Completed	Removed ⁴	Appeals Denied	Appeals Approved
7	382	291	65	12	4		5	1	0	0
8										
9	¹ Includes customers who were verified as over income, requested to be removed, or did not agree to participate in ESA.									
10	² Includes customers who declined to participate in ESA, failed to respond to appointment requests, or missed multiple appointments.									
11	³ Includes customers who previously participated, did not meet the three-measure minimum, landlord refused, etc. These customers move directly to Stage 3.									
12	⁴ Customers removed for exceeding 600% of baseline in any monthly billing cycle.									

San Diego Gas Electric Company

	A	B
1	PY 2013 CARE Annual Report CARE Table 14 Categorical Enrollment	
2		
3		
4		
5		
6	Type of Enrollment	Number of customers Enrolled ¹
7	Women, Infants, and Children Program (WIC)	7,154
8	Supplemental Security Income (SSI)	3,398
9	CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	8,901
10	CalWORKs/Temporary Assistance for Needy Families (TANF) ²	2,084
11	Tribal TANF ²	-
12	Medicaid/Medi-Cal	13,551
13	Healthy Families A&B	1,731
14	National School Lunch Program (NSLP) - Free Lunch	4,520
15	Low-income Home Energy Assistance Program (LIHEAP)	997
16	Bureau of Indian Affairs General Assistance	-
17	Head Start Income Eligible - (Tribal Only)	324
18	¹ Number of customers enrolled reflects categorical programs selected by customer. Please note in some cases customer select more than one eligible program for a single account. ² CalWORKS and Tribal TANF are combined categorical programs with no distinction between the two programs.	
19		
20		
21		
22		