



A  Sempra Energy utility<sup>®</sup>

**TWENTIETH ANNUAL PROGRESS REPORT ON  
THE CALIFORNIA ALTERNATE RATES FOR  
ENERGY PROGRAM**

**JANUARY 2008 – DECEMBER 2008**

**May 1, 2009**

## Table of Contents

CARE PROGRESS REPORT .....	3
RESIDENTIAL AND EXPANDED PROGRAMS .....	3
II. Usage and Bill Information.....	9
IV. Outreach.....	13
V. Processing CARE Applications .....	23
VI. Program Management.....	27
CARE EXPANSION PROGRAM .....	27
I. Participant Information .....	28
II. Usage Information .....	29
III. Program Costs.....	29
IV. Outreach.....	29
V. Processing CARE Applications .....	31
VI. Program Management.....	32
ATTACHMENTS	

Attachment A – PY2008 SDG&E CARE Outreach and Leveraging Through December 2008

Attachment B – SDG&E CARE Discount and Participation

## **CARE PROGRESS REPORT**

### **RESIDENTIAL AND EXPANDED PROGRAMS**

**January 1, 2008 through December 31, 2008**

#### **CARE RESIDENTIAL PROGRAM**

**Individual and Submetered Participants (Tenants of Qualifying Master-Metered Customers)**

**I. Participant Information:**

- A. Provide the total number of residential CARE customers, including submetered tenants, by month, by energy source, for the reporting period.**

**See Tables 1.1 and 1.2.**

Table 1.1 Residential CARE Program Gas Customers by Month		
PY2008	Total CARE Participants	Percentage Change
January	156,925	-
February	156,825	-0.1%
March	157,314	0.3%
April	158,816	1.0%
May	159,525	0.4%
June	161,275	1.1%
July	161,713	0.3%
August	162,326	0.4%
September	163,370	0.6%
October	164,284	0.6%
November	164,313	0.0%
December	166,027	1.0%

Table 1.2 Residential CARE Program Electric Customers by Month		
PY2008	Total CARE Participants	Percentage Change
January	223,763	-
February	226,103	1.0%
March	226,593	0.2%
April	228,969	1.0%
May	230,232	0.6%
June	232,164	0.8%
July	233,288	0.5%
August	234,373	0.5%
September	236,462	0.9%
October	238,153	0.7%
November	238,482	0.1%
December	241,196	1.1%

Note: There is a net increase of 9,213 gas and 11,437 electric customers over program year 2007.

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

No monthly variance of 5% or more in the number of participants occurred in PY2008.

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

**1. Describe the estimates of current demographic CARE-eligibility rates, were derived.**

SDG&E, and the other California IOU's, used the joint utility methodology adopted by the Commission in D.01-03-028 for developing quarterly and monthly penetration estimates in 2008. This method entails annual estimation of eligibility for CARE, LIEE, and other income-by-household size parameters at the small area (block group, census tract, zip) for each IOU territory and for the state as a whole.

Sources for this estimation include the Commission's current guidelines, current year small area vendor distribution on household characteristics, Census Public Use Microdata Sample (PUMS) 2000 and PUMS 2004-2006 sample data, utility meter and master meter household counts, Department of Finance Consumer

Price Index (CPI) series, and various geographic information systems (GIS) sources.

Estimates from the block group level are aggregated to county/utility and whole utility level, among other aggregations. Annually, the utility applies county/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, the utility 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 November 2007, Athens Research made a refinement to the joint utility method. This method uses available (and legitimately obtainable) Census data (Advance Query, Public Use Microdata Sample (PUMS), and SF3) tabulations to produce block level estimates of eligibility at 200% of federal poverty guidelines among individually metered, sub-metered, and non-sub-metered master metered. These estimates may be aggregated in various ways to provide current year estimates of by “payer status”, i.e., individually metered, sub-metered, and non-sub-metered.

The most recent estimates of eligibility by payer status are used to disaggregate the overall CARE eligibility rate that has been estimated historically, yielding CARE eligibility and estimates that differ between individually and sub-metered households (and which are consistent with the overall estimate).

**2. Describe how the estimates of current CARE-eligible meters were derived. Explain how total residential meters were adjusted to reflect CARE-eligible meters (including submetered tenants) and CARE-ineligible meters (i.e., master meters that are not submetered or other residential meter configurations that do not provide residential service.)**

See SDG&E’s response to Question I.B.1 above. CARE eligibility rates by small and large area are developed so that they apply to individually metered and sub-metered households only. Additionally, as the utilities apply these rates in successive annual filings, they are applied to individually metered and sub-metered household counts for a given quarter.

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

See SDG&E's response above to Question I.B.1. Note that the methodology is based on estimating small area (block group) level household size-by-income-by 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.

**4. Describe how current CARE customers were counted.**

Current CARE customers were counted by tallying the number of individually-metered residential customers billed each month on the CARE rate plus the number of submetered tenants receiving service through residential master-metered accounts participating in CARE.

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

The formula for calculating CARE-participation rates is:

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

The formula was used to determine the CARE-participation rates by energy source.

**C. Provide the total number of CARE residential customers, CARE-eligible households, and CARE participation rates, by energy source, by quarter.**

See Tables 2.1 and 2.2.

<b>TABLE 2.1</b>			
<b>CARE Residential Penetration Rate</b>			
<b>Gas</b>			
<b>2008 Quarter Ending</b>	<b>CARE Residential Customers</b>	<b>CARE-Eligible Customers</b>	<b>CARE Penetration Rate</b>
31-Mar	157,314	227,613	69.1%
30-Jun	161,275	227,782	70.8%
30-Sep	163,370	227,000	72.0%
31-Dec	166,027	227,187	73.1%

<b>TABLE 2.2</b>			
<b>CARE Residential Penetration Rate</b>			
<b>Electric</b>			
<b>2008 Quarter Ending</b>	<b>CARE Residential Customers</b>	<b>CARE-Eligible Customers</b>	<b>CARE Penetration Rate</b>
31-Mar	226,593	323,621	70.0%
30-Jun	232,164	323,943	71.7%
30-Sep	236,462	324,389	72.9%
31-Dec	241,196	326,157	74.0%

Note: The penetration rate decreased from 74% to 72% due to an increase in the eligible population for 2009 and the addition of the count of eligible submetered units in the service territory. Previously, the eligible meter count included submetered accounts and not the units for each account.

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

Estimates of SDG&E's CARE-eligibility rates are:

System Wide Gas Rate – 27.16%

System Wide Electric Rate – 26.60%

**E. Provide the estimates of current CARE-eligible submetered tenants of master-meter customers by energy source at year-end.**

At year-end SDG&E had 32,203 gas submetered customers in 806 master-meter facilities. Assuming, 26.60% of its residential gas customers are eligible for CARE, SDG&E estimates that 8,566 of its gas submetered customers are CARE-eligible.

SDG&E had 37,609 electric submetered customers; assuming 27.16% of its residential electric customers are eligible for CARE. SDG&E estimates that 10,215 of its electric submetered customers are CARE-eligible.

**F. Provide the current CARE submetered tenant counts by energy source at year-end.**

Gas -	8,967
Electric -	9,991

**G. Provide the current CARE submetered tenant penetration rates by energy source at year-end.**

Gas -	104%
Electric -	98%

**H. Discuss any problems encountered during the reporting period administering the CARE program for submetered tenants and/or master-meter customers.**

SDG&E did not encounter any problems during the reporting period administering the CARE program for submetered tenants and/or master-meter customers.



## II. Usage and Bill Information

**A. Provide a comparison of CARE and non-CARE residential usage by Baseline and Non-Baseline, excluding usage of residential master-meter customers, by energy source.**

See Table 3.

<b>TABLE 3*</b>			
<b>Average Monthly Gas/Electric Usage Residential Non-CARE vs. CARE Customers</b>			
<b>Residential Customer</b>	<b>Gas Therms Baseline</b>	<b>Gas Therms Non-Baseline</b>	<b>Total</b>
Non-CARE	23	8	31
CARE	20	5	25
<b>Residential Type</b>	<b>Electric kWh Baseline</b>	<b>Electric kWh Non- Baseline</b>	<b>Total</b>
Non-CARE	301	244	545
CARE	282	110	392

**B. Provide a comparison of the average monthly bill for CARE and non-CARE residential customers, excluding bills of master-meter residential customers, by energy source.**

See Table 4.

<b>TABLE 4*</b>		
<b>Average Monthly Gas/Electric Bill Residential Non-CARE vs. CARE Dollars per Customer</b>		
<b>Customer</b>	<b>Gas</b>	<b>Electric</b>
Non-CARE	\$ 59.34	\$ 92.91
CARE	\$ 26.00	\$ 43.77

\*Data contained in tables 3 and 4 derives from an analysis of SDG&E's billing data and excludes public purpose program (PPP) surcharges funds.

### III. Program Cost<sup>1</sup>

#### A. Discount Cost

**1. State the average monthly CARE discounts received, in dollars per CARE customer, by energy source.**

Average Gas Discount -	\$4.74
Average Electric Discount -	\$11.41

**2. State the annual subsidy (discount) for all CARE customers by energy source.<sup>2</sup>**

Annual Gas Subsidy –	\$12,557,433
Annual Electric Subsidy -	\$31,883,465

#### B. Administrative Costs

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

See Table 5.

<b>TABLE 5</b>			
<b>CARE Residential Program</b>			
<b>CARE Costs and Reporting Classifications</b>			
<b>Category</b>	<b>Cost</b>		
	Residential	Expansion	Total
Outreach	\$1,304,732	\$0	\$1,304,732
Processing, Certification and Verification	\$255,220	\$5,287	\$260,507
Information Technology/Programming	\$508,779	\$0	\$508,779
Measurement and Evaluation	\$58	\$0	\$58
Regulatory Compliance	\$193,528	\$0	\$193,528
General Administration	\$381,657	\$0	\$381,657
CPUC Energy Division Staff Funding	\$44,858	\$0	\$44,858
<b>Total Program Costs</b>	<b>\$2,688,832</b>	<b>\$5,287</b>	<b>\$2,694,119</b>
Subsidies and Benefits – Rate Discounts, SEC discounts	\$43,372,444	\$917,321	\$44,289,765
<b>TOTAL PROGRAM COSTS AND CUSTOMER DISCOUNTS</b>	<b>\$46,061,276</b>	<b>\$922,608</b>	<b>\$46,983,884</b>

**2. Explain what is included in each administrative cost category.**

**Outreach:** Included in this category are costs for printing and mailing of CARE applications/documents, printing and mailing of the annual notification, postage,

<sup>1</sup> Information on average discount amount is derived from an analysis of SDG&E's billing data.

<sup>2</sup> Information on annual subsidy amount derives from SDG&E's revenue reports, which support the CARE balancing account, rather than from billing data.

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 payments and any agency-related outreach support efforts are also included in this category. Capitation payments are compensation fees paid to third-parties and community-based organizations that facilitate CARE enrollment for eligible hard-to-reach customers.

**Processing, Certification and Verification:** 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 all CARE applications; 3) initiating and responding to customers' inquiries regarding CARE applications/program; and 4) tracking CARE enrollment and operating statistics in support of operations, management, and regulatory reporting.

**Information Technology(IT)/Programming:** Included in this category are 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 CPUC mandates, and improving operation efficiency.

**Measurement and Evaluation:** Costs for measurement and evaluation includes contract and staff labor expenses for CARE participant eligibility updates.

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

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

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

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

Gas –	\$ 291,779 Under-collection
Electric -	\$8,514,486 Under-collection

**D. 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 balancing accounts are discount and program specific administrative expenses as described above. Costs for corporate services (e.g., Legal Department Services and Regulatory Department Services) are not recorded to the CARE balancing account.

CARE program costs are recovered via the PPP rate component for electric costs and the surcharge PPP rate for gas costs.

**E. 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 Tables 6.1 and 6.2.

<b>TABLE 6.1</b> <b>GAS</b> <b>CARE Surcharge and Revenue Billed by Customer Class</b>					
<b><u>Customer Class (1)</u></b>	<b><u>Bill (2)</u></b>	<b><u>CARE Surcharge</u></b>			
	<b>Avg. Monthly</b>	<b>Avg. Monthly</b>	<b>% of Bill</b>	<b>Billed (3)</b>	<b>% of Billed</b>
CORE Residential	\$40	\$1	1.8%	5,743,574	50%
CORE Commercial / Industrial	\$460	\$12	2.6%	4,403,201	38%
CORE Natural Gas Vehicles	\$25,607	\$659	2.6%	267,458	2%
NONCORE Commercial/Industrial	\$7,377	\$1,788	24.2%	<u>1,135,452</u>	10%
<b>Total</b>				<b>\$11,549,685</b>	<b>100%</b>

(1) Per SDG&E gas rate Schedule G-PPPS.

(2) Includes PPP Surcharge Funds.

(3) CARE Surcharge funds billed as a component of the PPP rate (Schedule G-PPPS) for payment to California Board of Equalization (BOE).

TABLE 6.2					
ELECTRIC					
CARE Surcharge and Revenue Billed by Customer Class					
<u>Customer Class</u>	<u>Bill (1)</u>	<u>CARE Surcharge</u>			
	<u>Avg. Monthly</u>	<u>Avg. Monthly</u>	<u>% of Bill</u>	<u>Billed (2)</u>	<u>% of Billed</u>
Residential	\$91	\$ .89	1%	\$10,574,973	33%
Commercial	\$629	\$7.67	1.2%	\$13,215,799	42%
Industrial	\$43,118	\$874.97	2%	7,372,517	23%
Agricultural	\$851	\$10.72	1.3%	487,767	2%
<b>Total</b>				<b>\$31,651,056</b>	<b>100%</b>

(1) Includes funds billed for payment to the Department of Water Resources (DWR).

(2) CARE Surcharge is a component of the funds billed per the public purpose programs (PPP) rate.

#### IV. Outreach

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

1. **Intra-Utility Integration** - Outreach methods undertaken by SDG&E using company resources and channels to promote program enrollments.

**Low-Income Energy Efficiency Program (LIEE)** – SDG&E's LIEE program provides recipients of LIEE services with in-home energy education, including CARE information and an opportunity to apply for CARE. A check box is located on the weatherization assessment form that allows the customer to opt in to the CARE program. The CARE program

was provided with a list of 5,547 customers who requested CARE enrollment and were determined eligible for participation based on income documentation provided as part of qualifying for the LIEE program. Enrollments from the LIEE program totaled 3,776 in 2008.

**Customer Contact Employees** – SDG&E believes its continued partnership with its call center is integral to reaching CARE enrollment goals. Customer Service Representatives (CSRs) are a customer's first point of contact. CSRs have the opportunity to gauge customers' needs through the course of telephone interaction. For example, a non-CARE customer discussing difficulty paying their bill may indicate they are low income. CSR's have proven to take these kinds of opportunities and recommend the CARE program to the potentially qualified customers. In 2008, CSRs mailed over 52,000 CARE applications to customers, of which, 9,367 were enrolled. CSRs also played a significant role in driving customers to enroll online using the CARE application available on [www.SDGE.com](http://www.SDGE.com).

**2008 Bill Inserts and Annual Notification** – In February 2008, SDG&E included a CARE application with the bills of customers not yet enrolled in the program. This bill insert is a simple format with a single-language approach while the annual notification occurring, in July and August, is a bilingual, full sized CARE application. In an effort to boost the response rate, SDG&E combined the annual notification with an automated telephone campaign to customers in areas with a high probability of being eligible for CARE, notifying them of the upcoming insert in their utility bill. This effort reached over one million customers. The program received 4,940 applications, an increase of over 1,000 applications from the previous year. A total of 4,259 customers were enrolled in CARE.

**Bill Message** – SDG&E promotes CARE with messages on the utility bill as well as on the billing envelope. In August, a message about the CARE program was printed on the utility bill at no additional cost to the program. SDG&E's monthly newsletter, *Energy Notes*, is a publication that includes information on programs the utility offers, tips on saving energy, and other information of interest. In 2008 the publication included an article on the CARE program as well as other customer assistance programs. The article informed customers about the program and provided directions on how to apply.

**Interactive Voice Response (IVR) Information on Hold** – The telephone messages heard by customers waiting for assistance from SDG&E's call center provides information about the CARE program in both English and Spanish. The system provides the customers with the option to order

CARE applications directly from the IVR without having to speak to a CSR. Approximately, 3,863 customers requested CARE applications using the IVR.

**Branch Offices and Field Collection Services** - The CARE program creates opportunities in which to leverage with other sources within the company. SDG&E customers visiting branch offices are informed about the program and provided CARE applications for program enrollment. SDG&E field collectors promote the CARE program while delivering notices to customers facing disconnection. Along with these disconnect notices, customers are provided a CARE application. SDG&E also provides an additional outbound telephone call with a follow-up letter to low-income customers faced with collection activity on their account. Information about the availability of payment arrangements and customer assistance programs are given, and the customer is urged to call SDG&E for more information.

**Customer Brochures** – In mid-2008, SDG&E began including CARE applications to all residential customers opening a new account. The Residential New Customer Packet, also available Spanish, is provided to new customers entering the service territory for the first time. This effort added 1,072 enrollments to the program. Additionally, CARE information is available upon request in the Customer Assistance packet and over 93,000 Residential New Customer Packets were mailed to new customers. Information about the CARE program is also included in the SDG&E brochure Extra Help for Those Who Need It, the Customer Assistance Fact Sheet, and the Medical Baseline application. All pieces describe the CARE program and how to apply. The CARE program is also described in the Cool Zone brochure, used during the summer months and available at over 30 San Diego County Cool Zone locations.

**In-Language Resources** – SDG&E's Customer Call Center and most company business offices are staffed with bilingual (English/Spanish) CSRs to ensure that most customers have access to information about the utility services. In addition to Spanish-speaking CSRs, the telephone center is also staffed with CSRs who speak Vietnamese, Chinese and Korean. The CARE processing group is also bilingual in English and Spanish. Additionally, SDG&E contracts with AT&T's language services organization to provide in-language support to customers whose language is not spoken by SDG&E CSRs. The service offers interpreter service for different languages and dialects that include, but is not limited to, French, German, Italian, Japanese, Russian and Tagalog. SDG&E representatives remain on the telephone line with the customer and connect the customer to

the interpreter for translation. SDG&E also operates a TTY/TDD service which is available 24 hours a day, seven days a week.

2. **Inter-Utility Integration** – Enrollment efforts utilizing data-sharing technologies between IOU's in a shared service territory.

**Data Exchange** – SDG&E and Southern California Gas Company (SoCalGas) exchange CARE customer data in the shared service territory of Southern Orange County throughout the program year. SDG&E received 104 potential enrollees from this list and enrolled 99 customers. The accounts that were not enrolled included those with names that could not be matched, or accounts that were closed after the match had been made. Customers were mailed a letter notifying them of their enrollment and provided the opportunity to opt out of the program. The accounts without a name match were mailed a CARE application.

3. **Targeted Outreach Efforts** - Outreach and enrollment efforts undertaken by the utilities to enroll a large number of customers in an effort to maximize enrollment and increase program awareness.

**Telephone Enrollment** - SDG&E continued to integrate automated outbound telephone campaigns to the program's marketing plan. The telephone campaigns provided a platform to reach several thousands of customers in a matter of minutes. In 2008, SDG&E worked with third party vendors in designing campaigns to reach over 150,000 customers. The telephone campaigns allowed qualified customers to directly enroll in the CARE program. The outbound message (with an option to hear the message in Spanish) included a description of the CARE program and its benefit, the eligibility information necessary for enrollment, and the option to agree or disagree with the CARE declaration statement. SDG&E enrolled 6,519 customers using telephone enrollment, which represents 11% of the program's total enrollments for program year 2008.

**Direct Mail** – Direct mail marketing remains a very successful outreach tool and, according to CARE customer satisfaction surveys, it is the second best method that customers recall hearing about the CARE program. A unique aspect of direct mail is that customers continue to mail in the applications, long after the effort took place. In 2008, direct mail collected from years past contributed an additional 887 enrollments for the program. Overall, 14% of the program enrollments came from direct mail. In 2008, there were eight direct mail campaigns targeting customers in hard to reach areas. In total, SDG&E mailed over 200,000 pieces to potential CARE eligible customers. The average response rate for direct mail was 4% and of those who responded, 78% were enrolled in the program. SDG&E also conducted two campaigns in which postcards were mailed to customers



who did not respond to a particular direct mail campaign. The postcards highlighted the utility web site as an available method of enrolling in the CARE program. The postcard effort was perceived as part of the reason the CARE on-line submissions continue to increase. Overall, direct mail marketing contributed 8,714 new CARE enrollments in 2008.

#### **Direct Mail to Customers with Disabilities**

In 2008, SDG&E conducted two direct mail campaigns targeting customers with disabilities, and one campaign targeting customers enrolled in SDG&E's Medical Baseline and Temperature Sensitive programs. SDG&E purchased a list identifying disabled customers in the SDG&E service territory and compared the addresses to those of customers enrolled in the program. Once SDG&E had a clean list of non-CARE customers with a disability, a letter and CARE application was mailed to these customers. SDG&E received 879 applications and enrolled approximately 623 customers from the combined efforts targeting this customer segment.

4. **Mass Media Outreach** – SDG&E employs mass media campaigns, including radio, television and print to reach large audiences to convey a clear and concise message, and boost awareness for the CARE program. Mass media efforts are an essential component to the program's success as they provide immeasurable awareness for the program, and when used in conjunction with other strategies such as direct mail and bill inserts, mass media can positively impact response and enrollment rates. In order to gain exposure for the CARE program, SDG&E utilized the following:

**Television** - SDG&E conducted 30-second television spots on both English and Spanish language networks. The spots described the CARE program, the benefits the program provides, as well information on how to apply. The spots were televised in English on all major networks in addition to eight cable stations. The spots were televised in Spanish on three Spanish-language networks. Both English and Spanish campaigns ran from June to August. The television spots reached an estimated 97% of the targeted audience of adults 35 to 64. The television campaign also included the following added value components:

- Bonus 10 second spots
- KFMB's Summer Safety campaign
- Distribution of CARE applications at KGTV events
- Provided a link to the CARE application posted on the Univision and Telemundo network's website during the course of the media campaign

Digital communication technology provided an additional opportunity for the utility to interact with customers directly. Customers with a Cox digital

cable box were able to interact with the CARE program through their remote control. During the course of the thirty second television spots, customers with digital cable were able to view a special message on their TV screen which instructed the customer to push “A” on their remote control for more information about the CARE program. SDG&E received 581 leads from the interactive media effort, which were followed up with outbound e-mails that contained a link to the CARE application.

**Radio** - SDG&E purchased radio air time for disc jockey (DJ) ad libs, which are non-scripted short spots where the DJ speaks about the CARE program on Spanish and Asian language radio. During these spots, radio personalities spoke of the benefits of the CARE program to their listeners. The spots, in various radio formats, ran from June to August, and reached approximately 14% of the targeted audience. The Spanish radio spots featured an added value of the following:

- 5 traffic sponsorships per week on KLVN-FM, KLQV-FM, and XLTN-FM
- One bonus spot per week KHTY-FM- Plus banner on La Invasora web page

The Asian language radio spots were featured on TNT San Diego, and a Vietnamese radio station. The spots consisted of 30 second live mentions of the CARE program.

**Print** - SDG&E used a variety of print advertising to generate awareness for the CARE program and to reach multi-ethnic segments of the service territory. Print advertising resulted in 1,140 applications and 309 enrollments, and 758 customers recertified their eligibility. The program advertised in the following publications:

***PennySaver*** - featured a bilingual ad inserted in targeted zip codes that reached 115,000 households.

***San Diego Union Tribune Micro Zone*** – featured a bilingual ad inserted in targeted zip codes that reached 105,000 households.

***Val Pak*** – An English only CARE application was inserted in the monthly coupon pack and sent to targeted zip codes that reached 60,000 households.

The program also advertised in the following Asian publications:

- San Diego Chinese Tribune; American Chinese Times; Next Weekly, Chinese News; Saigon Nho Nguoi Viet San Diego, Asian Journal SD; and the Filipino Press.

All the featured ads promoted the CARE program and demonstrated how to apply. The Asian print campaign reached an estimated 237,000 households.

SDG&E advertised in two publications targeting the senior community – “San Diego, After Hospital Planner” and the “Eldercare Directory.”

**Outdoor Media** - The program explored a new frontier with the addition of outdoor media. Advertisements for the CARE program were prominently displayed in mass transit shelters. SDG&E requested coverage in areas of high estimated CARE eligibility. The bilingual poster featured a picture of a family and the words “*Start Saving 20% on Your SDG&E Bill Today.*” The web address to SDG&E’s web page and link to the CARE application was also printed on the ad. The posters were displayed in transit shelters from March thru June.

## **5. Third Party Outreach (Leveraging)**

### **Third Party Outreach Activity**

**Outreach and Enrollment Capitation Contractors** – In PY 2008, SDG&E reports 53 CARE capitation agencies at 121 different sites provided outreach and enrollment services for the CARE program. These agencies submitted 16,131 applications with 6,862 customers enrolled on the CARE program. The contracted agencies were paid a fee ranging from \$5.00 to \$15.00 per qualified application, depending on their length of service, extent of outreach, and contract terms.

**Leveraging with Community-Based Organizations** - Included participating in 77 local community outreach events throughout San Diego County to provide information on CARE and other customer assistance programs. Types of outreach events included presentations to senior citizens and community groups, governmental agencies, health and safety fairs, community resource fairs, with several events geared toward faith based organizations. Twenty-two outreach events were leveraged with the Residential Lighting Turn-In Program specifically targeting hard-to-reach and low income residential customers. At these outreach events information on all SDG&E Customer Assistance Programs were made available to customers. Hard to reach groups within the low income community were better served in 2008 through increased numbers of faith-based and health clinic organizations contracted as CARE capitation agencies.

**Door-to-Door Canvassing** - In 2008, SDG&E deployed door-to-door contractors, which resulted in more than 4,400 CARE enrollments. Two new procedures supported the success of this outreach effort:

1. The door-to-door contractor was provided a list of customers who were eligible for CARE, but not enrolled.
2. The enrollments were tracked in a way that they could be uploaded into the system in an efficient manner.

The new process ensured that the effort was targeted in order to maximize the effectiveness of the campaign and the processing of the applications was expeditious.

**2-1-1 Info Line** – During PY2008, 2-1-1 answered 26,160 energy assistance telephone calls. The CARE and Family Electric Rate Assistance (FERA) programs were discussed during these telephone calls along with other assistance programs and an application was sent to those who requested one. The agency is capable of enrolling customers in the CARE program via the internet and enrolled 387 customers in 2008.

**B. Discuss each of the following:**

**1. Most effective outreach method, including a discussion of how success is measured.**

SDG&E interprets effective outreach in several ways:

- Greatest source of enrollments;
- most cost effective method of enrollment; and
- most efficient method of enrollment.

There were several outreach methods that proved highly effective in 2008. The Call Center provided the most enrollments for the program, at 9,358 or 15% of all enrollments. Direct mail, at 14% of all enrollments, and internet at 12%, were also successful outreach methods. Since applications received through internet reduce the amount of time, effort and cost associated with enrollments. The internet enrollment has proven to be the most cost-effective method.

Outreach efforts were made more effective by implementing processing efficiencies. Due to system enhancements and outbound telephone enrollments, at 11% of total program enrollments. Outbound telephone enrollment was successful not only because of the total number of enrollments, but also due to the ability to expedite the application processing via the new upload procedures. Applications that are uploaded reduce processing costs from slightly over \$2 to under \$.50 per minute. The uploaded applications do not involve opening and sorting mail, cost is saved here as well as in the labor for the actual application data entry that is required for traditional applications.

**2. How CARE customer data and other relevant program information is shared by the utility with other utilities sharing its service territory.**

**Joint Utility Meetings** – In 2008, SDG&E, along with SoCalGas, Pacific Gas and Electric Company, Southern California Edison Company, and Southwest Gas Corporation, participated in quarterly joint utility meetings to discuss outreach efforts and current program issues. The meetings provided a forum for discussing success and non-success stories, as well as other program management issues and experiences.

**3. How CARE customer data and other relevant program information is shared within the utility, for example, between its LIEE and other appropriate low-income programs.**

CARE information was provided to customers through various programs offered by SDG&E. CARE applications and program information were distributed through the LIEE outreach personnel, Medical Baseline communication and various energy efficiency programs, such as the Lighting Turn-In and Energy Audits programs.

The data received from LIEE regarding potentially eligible customers, not yet enrolled in CARE (but are enrolled in LIEE) is provided to the CARE program. This data is used to enroll CARE program customers and also utilizes existing CARE enrollment data in targeting its outreach efforts.

**4. Attach a copy of the utility's agreement with CSD. 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.**

As part of SDG&E's leveraging agreement with the Department of Community Services and Development (DCSD) SDG&E continues to add a statement on its CARE application describing the DCSD Low Income Home Energy Assistance Program bill payment assistance programs and weatherization services and providing DCSD's telephone number for customers to call to obtain more information.

DCSD did not request SDG&E's detailed report that provides on a monthly basis, the number of CARE participants and the total CARE discount for PY 2008.

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

During PY 2008 approximately 74% of all customers eligible for CARE were enrolled. Challenges to capturing all eligible households included language,

culture, and geographical barriers. Significant efforts to overcome these challenges include the following:

- Increasing the number and diversity of community based organizations participating as CARE capitation contractors;
- Contracting the San Diego Health and Human Services Agency to enroll CalWorks participants on CARE;
- Increasing the number of Lighting-Turn-in events held in low income and hard to reach areas;
- Expanding outreach to low income customers through a partnership with H&R Block that resulted in more than 1,200 CARE enrollments;
- Supporting the California Earned Income Tax Credit (EITC) program by partnering with EITC agencies to include completing a CARE application for every client;
- Increasing the number of CARE enrollments through the Women's, Infants, and Children's (WIC) by 200% by contracting with all WIC sites throughout the service territory;
- Improving partnership with healthcare agencies to enroll customers in CARE at the time they apply for financial aid;
- Leveraging with the San Diego Food Bank to enroll low income and hard to reach customers in CARE at food distribution events;
- Leveraging with faith-based organizations during holiday intake events; and
- Integrating with key groups such as credit and collections, customer service field, and branch office operations

In 2008, the Energy Programs Outreach team continued to refine their approach to increasing CARE enrollments through community based organizations, local government organizations, and health clinics. Through weekly and bi-weekly "service calls" to agencies, Market Advisors serve as account managers and drive enrollment efforts through consistent and customer-oriented outreach efforts. The proactive, service-oriented outreach approach was productive in achieving enrollment goals for CARE capitation contractors. CARE enrollments increased more than 300% compared with the previous year (from 2,600 to 6,862 enrollments).

**C. 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.**

In the third quarter, SDG&E implemented an enhancement to its application and enrollment system that allowed the batch creation of applications into the database. For all enrollments that can be captured electronically, the upload process enables a

system administrator the ability to generate up to 500 applications in a matter of minutes. The applications are staged for final approval by a processor, which takes a few seconds per application. This has significantly increased both program efficiency and cost effectiveness. By eliminating the requirement to manually enter application data, potential for data entry error is reduced, while simultaneously reducing processing time. Moreover, mailing and printing costs are reduced and campaign results can be reported almost immediately. Examples of outreach methods that utilize the upload capability are the door to door and telephone campaigns.

SDG&E realized significant processing cost savings in 2008 with this program enhancement. While an average application costs just over \$2 per minute to process, the applications generated by the telephone campaign cost \$.25 per minute while the door to door applications cost just \$.47 per minute to process.

**CARE Acceptance Letter** – During the third quarter 2008, in an effort to improve customer service, the program implemented a CARE acceptance letter, which reduced customer telephone calls regarding status inquiries and duplicate enrollment applications. The letter, sent within two weeks of the customer's enrollment in the CARE program, contains important information about CARE, as well as information regarding other Customer Assistance programs for which they may qualify. SDG&E believes this new effort will help to reduce customer inquiries and the number of customers reapplying prior to their renewal period. SDG&E believes that the implementation of this letter also helped increase the CARE program's customer satisfaction score from 83% in 2007 to 90% in 2008.

**New CARE E-mail** - CARE established a program specific e-mail address, *billdiscount@SDGE.com*, which is included along with other contact information when possible on correspondence with customers. This effort provides customers with an additional channel to reach the CARE program and enabled program management to respond quickly to customer inquiries.

## **V. Processing CARE Applications**

### **A. Processing Self-Certification and Self-Recertification Applications (Individual and Submetered Customers)**

- 1. Provide the total number of third-party CARE applications received, approved, denied, pending/never completed, or duplicates in the reporting period.**

See Table 7.

<b>TABLE 7</b>					
<b>CARE Capitation Program</b>					
<b>January 1, 2008 through December 31, 2008</b>					
<b>CARE Applications Submitted</b>					
	<b>Received</b>	<b>Approved<sup>1</sup></b>	<b>Denied (Ineligible)</b>	<b>Pending/Never Completed</b>	<b>Duplicates</b>
<b>Total</b>	<b>23,975</b>	<b>21,202</b>	<b>1,048</b>	<b>0</b>	<b>1,725</b>
<b>Percentage</b>	100%	88%	4%	0%	7%

<sup>1</sup> Includes new enrollments and recertification.

**2. Provide the number of utility CARE self-certification and self-recertification applications provided, received, approved, denied, pending/never completed, or duplicates for the reporting period.**

See Table 8.

<b>TABLE 8</b>						
<b>CARE Self-Certification and Self-Recertification Applications</b>						
	<b>Provided<sup>1</sup></b>	<b>Received</b>	<b>Approved<sup>2</sup></b>	<b>Denied</b>	<b>Pending/Never Completed<sup>3</sup></b>	<b>Duplicates</b>
<b>Total</b>	<b>2,300,000</b>	<b>124,256</b>	<b>114,593</b>	<b>3,271</b>	<b>0</b>	<b>6,392</b>
<b>Percentage</b>	100%	10%	92%	3%	0%	5%

Note: 1. It is not possible to have an actual count of self-certification applications provided, given that the applications are distributed through a variety of way. Total self-certification and self-recertification application provided include the annual CARE notification to all CARE non-participating customers, direct mailing of CARE application to targeted areas, and recertification requests from SDG&E.

2. The total approved applications included the duplicated self-certification applications approved as self-certification applications.

3. Pending/Never Completed includes the applications with missing information on inactive accounts.

**3. Provide a table showing the number of customers removed from CARE by month due to the recertification process.**

See Table 9. Customers may be removed from CARE due to a variety of reasons, including non-response to a request to recertify, failure to complete the application process, ineligibility, or by customer request due to changed eligibility status.



<b>TABLE 9</b>			
<b>Residential CARE Program Customers Removed by Month through Recertification and Post-Enrollment Verification</b>			
<b>2008</b>	<b>Recertification</b>	<b>Post-Enrollment Verification</b>	<b>Total</b>
January	496	258	754
February	392	228	620
March	658	154	812
April	612	323	935
May	52	216	268
June	162	169	331
July	159	125	284
August	227	241	468
September	295	222	517
October	444	294	738
November	283	249	532
December	453	315	768
<b>Total</b>	<b>4,233</b>	<b>2,794</b>	<b>7,027</b>

**4. Describe the utility's process for recertifying submetered tenants of master-meter customers.**

Pursuant to D.89-07-62, SDG&E recertifies submetered tenants of master-meter customers on an annual basis.

Submetered recertification applications are mailed directly to the tenants to complete and return to the utility.

Tenant's Rights Fact Sheet sent when recertification requests mailed.

SDG&E issues a "preliminary" notice to the managers or owners of the development on the upcoming process. The notification packet contains the following:

1. A letter advising the manager that the recertification process has begun;
2. Posters in English and Spanish made available for the manager to post to notify the tenants;
3. Application forms made available; and

4. An information form for management to update complex information and order additional posters or applications.

If no response was received from the tenant after the first notice, SDG&E mailed a second notice and an application to the tenant.

**Mobile Home Parks** – In accordance with California Civil Code Section 798.43.1(a),<sup>3</sup> SDG&E mailed reminder notices to all managers and owners of submetered facilities stating that they must inform their tenants about the CARE program each year by February 1. CARE applications and bulletin board posters in English and Spanish were sent to facilities when requested.

Included with the notification was a request to update contact information for facilities. Managers and owners were asked to review the information on file and to make changes. They were also asked to provide their contact preference if given the choice of mail, email, or telephone.

SDG&E remained in compliance with AB 2104, which improves the communication between submetered tenants and the utility. After submetered tenants were enrolled in the program, the tenant received an acceptance letter, indicating their enrollment and how to contact the utility with any questions or concerns regarding their enrollment.

## **B. Processing Random Post-Enrollment Verification Applications**

1. Provide the total number of applications mailed, received, approved, denied, pending/never completed, or duplicates, for the reporting period.

See Table 10.

<b>TABLE 10</b>						
<b>CARE Random Post-Enrollment Verification Applications</b>						
	<b>Mailed</b>	<b>Received</b>	<b>Approved</b>	<b>Denied</b>	<b>Pending/Never Completed</b>	<b>Duplicates</b>
<b>Total</b>	<b>4,649</b>	<b>3,109</b>	<b>1,937</b>	<b>318</b>	<b>854</b>	<b>N/A</b>
<b>Percentage</b>	100%	67%	42%	10%	27%	N/A

Verifications pending includes customers responding with incomplete statuses and customers who have not responded

\*\*The number represents the difference between verification forms received with missing /incomplete information and the approved verification forms re-submitted by customers.

2. Provide a table showing the number of customers removed from CARE by month due to the verification process. (Note: Customers may be removed

<sup>3</sup> Otherwise referred to as Senate Bill (SB) 920 (2001), which requires the management of master-meter mobilehome parks to give residents written notice each year about assistance available to low-income persons under CARE.

**due to a variety of reasons including non-response to a request to verify income, failure to complete the verification process, ineligibility, or by customer request due to changed eligibility status.)**

See Table 9 above.

**C. 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.**

In 2008, SDG&E contracted with a third-party vendor who enrolled CARE customers in a door-to-door effort. The partnership resulted in 4,463 enrollments. The outreach areas were defined by SDG&E and targeted hard-to-reach customer segments. Considering the costs of targeted outreach and media campaigns to reach the hard-to-reach segment, the door-to-door effort was highly successful and will be continued in 2009.

## **VI. Program Management**

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

**CARE System** – The CARE system continued to improve enrollment tracking and reporting capabilities. System users are able to generate reports based on any number of criteria. For example, marketing campaigns can be monitored in real time as applications from each strategy are processed. The implementation of the upload capabilities has shown to be a major program upgrade, and in some cases, directed the program's outreach efforts in order to maximize the use of this tool. Program management continues to work towards finding innovative ways to utilize emerging technology in order to reduce costs and increase efficiency where possible.

## **CARE EXPANSION PROGRAM**

**This section covers the non-profit homeless shelters and group living facilities, migrant and farm worker housing centers, qualified privately-owned employee housing, and qualified non-profit housing for agricultural employees.**

**I. Participant Information**

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

See Table 11.

<b>TABLE 11</b>						
<b>CARE Expansion Program</b>						
<b>Participating Facilities by Month</b>						
<b>2008</b>	<b>Residential Gas Facilities</b>	<b>Commercial Gas Facilities</b>	<b>Total Gas Facilities</b>	<b>Residential Electric Facilities</b>	<b>Commercial Electric Facilities</b>	<b>Total Electric Facilities</b>
January	449	89	538	653	173	826
February	449	89	538	653	174	827
March	382	206	588	590	284	874
April	355	203	558	550	291	841
May	416	192	608	628	292	920
June	422	168	590	627	288	915
July	388	154	542	566	244	810
August	388	156	544	590	256	846
September	386	156	542	586	254	840
October	401	147	548	599	245	844
November	390	147	537	587	243	830
December	387	147	534	580	242	822

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

<b>Residential Gas:</b>	<b>1,172</b>	<b>Residential Electric:</b>	<b>3,820</b>
<b>Commercial Gas:</b>	<b>4,496</b>	<b>Commercial Electric:</b>	<b>7,148</b>

## **II. Usage Information**

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

See Table 12.

<b>TABLE 12</b>		
<b>CARE Expansion Program Average Monthly Gas/Electric Usage</b>		
<b>Type of Facility</b>	<b>Gas Therms</b>	<b>Electric kWhr</b>
Residential Facilities	141	762
Commercial Facilities	344	6,427

## **III. Program Costs**

### **A. Administrative Cost**

**1. Show the CARE Expansion Program's administrative cost by category.**

Processing, Certification and Verification – \$5,287

### **B. Discount Information**

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

Residential Facility Gas Discount – \$298

Residential Facility Electric Discount - \$285

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

Commercial Facility Gas Discount – \$ 947

Commercial Facility Electric Discount - \$1,931

## **IV. Outreach**

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

**SDG&E Outreach –**

SDG&E did not contract with any third-parties to outreach its Expanded CARE program.

**B. Discuss each of the following:**

**1. Most effective outreach method, including a discussion of how success is measured.**

SDG&E's annual recertification process continues to be the most significant method of outreach, as facility information is updated at that time, with new facilities being added and those no longer qualified being removed. SDG&E also utilized no-cost outreach efforts such as outreach specialists and the *Outreach Around the Region* newsletter to increase awareness of the Expanded CARE program. Additionally, CARE Market Advisors working with local non-profit organizations to provide information regarding the availability of Expanded CARE to the agencies they are working with in the community.

**2. How the CARE facility data and relevant program information is shared by the utility with other utilities sharing its service territory.**

SDG&E uses the Joint Utility Program Manager's quarterly meetings as a forum to share relevant program information regarding the Expanded CARE program with other utilities.

**3. Barriers to participation encountered in the prior year and steps taken to mitigate these, if feasible, or not, if infeasible.**

There were no barriers to participation encountered during PY2008.

**C. 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 believes that the Expanded CARE annual recertification process continues to be the most effective and low-cost form of outreach, reminding agencies to add new satellite facilities to the program. Cross referral among agencies is also a common no-cost source of enrollment for this program.

**V. Processing CARE Applications**

**A. Processing Self-Certification and Self-Recertification Applications**

**1. Provide the total number of third-party CARE Expansion program applications received, approved, denied, pending/never completed, or duplicates.**

SDG&E did not contract with third-parties to conduct outreach for its CARE Expansion Program.

**2. Provide the total number of utility CARE Expansion program applications received, approved, denied, pending/never completed, or duplicates for the reporting period.**

See Table 13.

<b>TABLE 13</b>					
<b>CARE Expansion Program Self Certification and Self Recertification</b>					
<b>Entity</b>	<b>Received</b>	<b>Approved</b>	<b>Denied</b>	<b>Pending/Never Completed</b>	<b>Duplicates</b>
<b>Total</b>	<b>1001</b>	<b>894</b>	<b>1</b>	<b>2</b>	<b>104</b>
<b>Percentage</b>	100%	89%	0.00%	.001%	11%

**B. 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 did not contract with any third-parties to conduct enrollment, recertification, or verification for the expansion program.

**VI. Program Management**

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

SDG&E reports that there were no issues and/or events that significantly affected program management during PY2008.



**SDG&E Twentieth Annual CARE Progress Report**  
**Attachment A – SDG&E CARE Outreach and Leveraging Through December 2008**

**Through December 2008**

<b>Activity</b>	<b>Summary</b>	<b>Timeline</b>	<b>Status/Results/Cost</b>
<b>January</b>			
City of El Cajon <b>Event</b>	Event for families who are in need of health resources.	1/12/08	300 Customers from El Cajon
<b>Presentation</b> - Alpha Kappa Alpha Head Start, Parent Meeting	Customer Assistance Program/ Energy Efficiency/ Rebate Presentation and CARE sign up	1/14/08	20 Parents from Lakeside
City of El Cajon <b>Event</b>	Event for families who are in need of health resources.	1/25/08	300 Customers from El Cajon
<b>Presentation</b> – Center for the Blind Vista	Customer Assistance Program/ Energy Efficiency/ Rebate Presentation and CARE sign up	1/30/08	25 Customers from Vista
<b>Presentation</b> – Center for the Blind Vista	Customer Assistance Program/ Energy Efficiency/ Rebate Presentation and CARE sign up	1/31/08	25 Customers from Vista
<b>February</b>			
<b>Presentation</b> – Center for the Blind Vista	Customer Assistance Program/ Energy Efficiency/ Rebate Presentation and CARE sign up	2/4/08	20 Customers from Vista
<b>Presentation</b> – Alpha Kappa Alpha Head Start, Parent Meeting	Customer Assistance Program/ Energy Efficiency/ Rebate Presentation and CARE sign up	2/8/08	25 Parents from El Cajon
City of National City <b>Event</b>	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	2/9/08	150 Customers from National City
Balboa Park Festival San Diego <b>Event</b>	Community Event for Families to obtain resources.	2/10/08	200 Customers from San Diego
San Clemente High School <b>Event</b>	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	2/23/08	210 Customers from San Clemente
<b>March</b>			
North Park Recreation Center <b>Event</b>	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	3/1/08	160 Customers from North Park
Women’s Resource Fair San Diego <b>Event</b>	Information for women who are in need of services to help them with employment, housing, etc.	3/1/08	400 Customers from San Diego

**SDG&E Twentieth Annual CARE Progress Report**  
**Attachment A – SDG&E CARE Outreach and Leveraging Through December 2008**

<b>Presentation</b> - Community Research Foundation - Heartland Center	Customer Assistance Program/ Energy Efficiency/ Rebate Presentation and CARE sign up	3/4/08	35 Customers from El Cajon
Jackie Robinson YMCA	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	3/8/08	104 Customers from San Diego
<b>Event</b>			
Food Pantry San Diego	Provide food to families who attend the clinic and received a referral from their physician	3/14/08	200 Customers from San Diego
<b>Event</b>			
Kick off to Kindergarten Spring Valley	Information event for families with children entering the educational system.	03/14/08	200 Customers from Spring Valley
<b>Event</b>			
Nazarene Church Health Fair	Event for families who are in need of health resources.	3/15/08	200 Customers from El Cajon
<b>Event</b>			
City of San Diego	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	3/15/08	62 Customers from San Diego
<b>Event</b>			
Women's Health Fair	Provided information to women regarding their diet, educations and resources for better health.	03/19/08	100 Customers from San Diego
<b>Event</b>			
Catholic Charities, Balboa Park	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	3/22/08	62 Customers from San Diego
<b>Event</b>			
City of El Cajon	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	3/29/08	103 Customers from El Cajon
<b>Event</b>			
<b>April</b>			
City of Oceanside	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	04/05/08	60 Customers from Oceanside
<b>Event</b>			
How We Live Health Fair Lakeside	Event for families who are in need of health resources.	04/05/08	300 Customers from Lakeside
<b>Event</b>			
Food Pantry San Diego	Provide food to families who attend the clinic and received a referral from their physician	04/18/08	200 Customers from San Diego
<b>Event</b>			
Feria Del Nino Consultado	Event for Hispanic families in need of resources to assist with their families.	04/23/08	100 Customers from San Diego
<b>Event</b>			
Salute To Our Heros	Community event for Families to obtain resource while also recognizing our military.	04/25/08	200 Customers from San Diego
<b>Event</b>			
Grape Day Park Health Fair	Event for families who are in need of health resources.	04/26/08	300 Customers from Escondido
<b>Event</b>			

**SDG&E Twentieth Annual CARE Progress Report**  
**Attachment A – SDG&E CARE Outreach and Leveraging Through December 2008**

City of Alpine <b>Event</b>	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	04/26/08	86 Customers from Alpine
Feria Del Nino Consultado <b>Event</b>	Event for Hispanic families in need of resources to assist with their families	04/29/08	100 Customers from San Diego
<b>Presentation</b> - Salvation Army Lindo Lake Senior Lunch Program in Lakeside	Customer Assistance Program/ Energy Efficiency/ Rebate Presentation and CARE sign up	04/30/08	22 Seniors from Lakeside
<b>May</b>			
City of Spring Valley <b>Event</b>	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	05/03/08	165 Customers from Spring Valley
City of San Juan Capistrano <b>Event</b>	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	05/03/08	185 Customers from San Juan Capistrano
City of Vista & Vista Chamber of Commerce <b>Event</b>	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	05/10/08	195 Customers from Vista
City of Chula Vista <b>Event</b>	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	05/17/08	285 Customers from Chula Vista
Family Event at El Cajon Library <b>Event</b>	Reading resource program and services for families to help their children.	05/17/08	150 Customers from El Cajon
Third Annual Wellness Fair <b>Event</b>	Health Fair to provide services to families who need resources.	05/22/08	200 Customers from San Diego
Senior Health Fair Santee <b>Event</b>	Community Event for seniors which provides information and resourced to them.	05/30/08	350 Customers from Santee
City of Escondido <b>Event</b>	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	05/31/08	295 Customers from Escondido
Salvation Army Kroc Center <b>Event</b>	Customer Assistance Program/ Energy Efficiency/ Rebate booth and CARE sign up	05/10	45 Customers from San Diego
<b>June</b>			
City Heights Farmers Market <b>Event</b>	Community Event to provide resources information to families in need.	06/06/08	200 Customers from City Heights

**SDG&E Twentieth Annual CARE Progress Report**  
**Attachment A – SDG&E CARE Outreach and Leveraging Through December 2008**

Santee Chamber of Commerce <b>Event</b>	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	06/07/2008	277 Customers from Santee
Vive Tu Vida Chula Vista <b>Event</b>	Community Research Event to provide information to families.	06/14/08	200 Customers from Chula Vista
Women's Health Fair San Diego <b>Event</b>	Provided information to women regarding their diet, educations and resources for better health.	06/18/08	100 Customers from San Diego
Cool Zone Kick Off El Cajon <b>Event</b>	Information for Seniors on Cool Zones with Aging & Independent Services. Had literature on CARE, ET, Medical Baseline, etc.	06/23/08	250 Customer from El Cajon
Aging Summit of San Diego <b>Event</b>	Lightning Event to help families with energy conservations by providing compact fluorescent light bulbs.	06/26/08	350 Customers from San Diego
Youth Summit of SDSU <b>Event</b>	Information to help our youth with services and programs to help them succeed.	06/27/08	150 Customers from San Diego
Go Green Community Event <b>Event</b>	Event to help increase the awareness of "Go Green" to the community to help families with conservation and the environment.	06/27/08	300 Customers from Spring Valley
City of San Diego <b>Event</b>	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	06/28/08	200 Customers from San Diego
<b>July</b>			
<b>Presentation</b> - North County Health Services Medical Center Health Fair	Open House for the new Medical Center, information on CARE and Energy Team was provided at this presentation.	07/11/08	50 Customers from San Diego
City of La Mesa & Grossmont Center Mall <b>Event</b>	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	07/12/08	277 Customers from La Mesa
City of Chula Vista & Community Collaborative <b>Event</b>	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	07/19/08	289 Customers from Chula Vista
<b>August</b>			
City of Oceanside & YMCA Youth & Community Services <b>Event</b>	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	08/09/08	207 Customers from Oceanside

**SDG&E Twentieth Annual CARE Progress Report**  
**Attachment A – SDG&E CARE Outreach and Leveraging Through December 2008**

Community of Encanto & Jackie Robinson YMCA <b>Event</b>	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	08/16/08	108 Customers from Encanto
Community of North Park <b>Event</b>	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	08/19/08	297 Customers from North Park
City of El Cajon <b>Event</b>	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	08/23/08	289 Customers from El Cajon
<b>September</b>			
City of La Mesa & Neighborhood Healthcare <b>Event</b>	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	09/13/08	28 Customers from La Mesa
Community of Clairemont & SAY San Diego <b>Event</b>	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	09/13/08	221 Customers from Clairemont
Grossmont Health Care District Kids's Care Fest <b>Event</b>	Community Research Event to provide information to families.	9/20/08	200 Customers from San Diego
Community of Mira Mesa & Mabuhay <b>Event</b>	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	09/27/08	520 Customers from Mira Mesa
<b>October</b>			
BiNational Health Week Health Fair <b>Event</b>	Health Fair to provide services to families who need resources.	10/07/08	200 Customers from San Diego
All About Youth Community Health Fair <b>Event</b>	Health Fair to provide services to families who need resources.	10/10/08	100 Customers from El Cajon
City of Escondido & Home Depot <b>Event</b>	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	10/11/08	475 Customers from Escondido
ARC of San Diego "Stepping Out" Health & Wellness FairKid's CARE Feast"	Health Fair to provide services to families who need resources.	10/16/08	100 Customers from El Cajon

**SDG&E Twentieth Annual CARE Progress Report**  
**Attachment A – SDG&E CARE Outreach and Leveraging Through December 2008**

City of Chula Vista & Chula Vista Community Collaborative <b>Event</b>	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	10/18/08	519 Customers from Chula Vista
Community of Linda Vista <b>Event</b>	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	10/25/08	178 Customers from Linda Vista
<b>November</b>			
City of Oceanside & Home Depot <b>Event</b>	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	11/01/08	344 Customers from Oceanside
City of San Marcos <b>Event</b>	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	11/08/08	496 Customers from San Marcos
At the Hop Health Fair & Flu Shop <b>Event</b>	Health Fair to provide services to families who need resources.	11/14/08	100 Customers from San Diego
City of Santee, Lakeside & Home Depot <b>Event</b>	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	11/15/08	332 Customers from Santee & Lakeside
<b>December</b>			
Nice Guys Christmas Event <b>Event</b>	Event to help sponsor families who are in need with services or items needed to help with transportation, clothing, etc.	12/06/08	1000 Customers from San Diego
<b>Salvation Army Intake</b>			
Chula Vista	Community Event	Oct-Dec	1000 Customers from Chula Vista
Oceanside	Community Event	Oct-Dec	1000 Customers from Oceanside
Centre City	Community Event	Oct-Dec	1000 Customers from Centre City
Vista	Community Event	Oct-Dec	1000 Customers from Vista
Escondido	Community Event	Oct-Dec	1000 Customers from Escondido
El Cajon	Community Event	Nov-Dec	1000 Customers from El Cajon
Joan Kroc	Community Event	Nov-Dec	1000 Customers from San Diego

**SDG&E Twentieth Annual CARE Progress Report**  
**Attachment B – SDG&E CARE Participation and Discount 2008**

**Attachment B**  
**Leveraging Funds**  
**SDG&E CARE Participation Discounts**

<b>San Diego Gas &amp; Electric Company CARE Program Discounts</b>				
<b>Month</b>	<b>Electric Discount</b>	<b>Gas Discount</b>	<b>Total Discount</b>	<b>Total Participants</b>
<b>Oct-07</b>	\$2,150,028	\$531,493	\$2,681,521	225,057
<b>Nov-07</b>	\$2,297,105	\$722,636	\$3,019,741	224,834
<b>Dec-07</b>	\$2,596,712	\$1,237,732	\$3,834,444	229,759
<b>Jan-08</b>	\$2,940,618	\$1,739,451	\$4,680,069	226,285
<b>Feb-08</b>	\$2,643,271	\$1,716,987	\$4,360,258	226,103
<b>Mar-08</b>	\$2,447,551	\$1,443,234	\$3,890,785	226,593
<b>Apr-08</b>	\$2,161,114	\$1,109,652	\$3,270,766	228,969
<b>May-08</b>	\$2,233,248	\$954,922	\$3,188,170	230,232
<b>Jun-08</b>	\$2,444,655	\$1,048,404	\$3,493,059	232,164
<b>Jul-08</b>	\$2,796,275	\$877,625	\$3,673,900	233,288
<b>Aug-08</b>	\$2,838,226	\$727,636	\$3,565,862	234,373
<b>Sep-08</b>	\$3,134,826	\$632,376	\$3,767,202	236,462
<b>Totals</b>	<b>\$23,639,784</b>	<b>\$10,250,287</b>	<b>\$33,890,071</b>	

**San Diego Gas & Electric Company**  
**Neighbor to Neighbor Program**

	<b>Bill payment/credit</b>	<b>Total participants</b>
Oct-07	\$45,713.72	204
Nov-07	\$33,492.11	172
Dec-07	\$64,593.02	316
Jan-08	\$70,971.73	344
Feb-08	\$96,969.42	474
Mar-08	\$74,289.22	370
Apr-08	\$48,126.66	240
May-08	\$25,344.89	127
Jun-08	\$10,104.92	53
Jul-08	\$7,535.95	38
Aug-08	\$7,843.07	41
Sep-08	\$5,366.48	26
<b>Grand Total</b>	<b>\$490,351.19</b>	<b>2405</b>