

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

Application of Southern California Edison  
Company (U 338E) for Approval of its Energy  
Savings Assistance and California Alternate Rates  
for Energy Programs and Budgets for Program  
Years 2015-2017.

And Related Matters.

Application 14-11-007  
(Filed November 18, 2014)

Application 14-11-009  
Application 14-11-010  
Application 14-11-011

**ANNUAL REPORT FOR FAMILY ELECTRIC RATE ASSISTANCE (FERA)  
PROGRAM OF SAN DIEGO GAS & ELECTRIC COMPANY (U902G)  
FOR PROGRAM YEAR 2015**

KIM F. HASSAN

*Attorney for:*

**SOUTHERN CALIFORNIA GAS COMPANY**

555 W. 5<sup>th</sup> Street, GT14E7

Los Angeles, CA 90013

Telephone: (213) 244-3061

Facsimile: (213) 629-9620

E-Mail: [khassan@semprautilities.com](mailto:khassan@semprautilities.com)

May 02, 2016

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FOR PROGRAM YEAR 2015**

San Diego Gas & Electric Company (SDG&E) hereby submits its Annual Progress  
Report for the Family Electric Rate Assistance (FERA) Program for the period January through  
December 2015

Respectfully Submitted,

By: /s/ Kim F. Hassan  
KIM F. HASSAN

*Attorney for:*  
**SOUTHERN CALIFORNIA GAS COMPANY**  
555 W. 5<sup>th</sup> Street, GT14E7  
Los Angeles, CA 90013  
Telephone: (213) 244-3061 | Facsimile: (213) 629-9629  
E-Mail: [khassan@sempuutilities.com](mailto:khassan@sempuutilities.com)

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**FAMILY ELECTRIC RATE  
ASSISTANCE (FERA)  
PROGRAM ANNUAL REPORT**

Program Year 2015 Results

**May 2, 2016**

## **INTRODUCTION**

The purpose of this annual report is to provide information on San Diego Gas & Electric Company's (SDG&E) Family Electric Rate Assistance (FERA) Program<sup>1</sup> and to report on the administrative and subsidy costs incurred by the program. The California Public Utilities Commission (Commission or CPUC) in D.04-02-057, dated February 26, 2004, adopted the FERA program, whereby qualifying lower-middle income large household participants are charged Tier 2 (101% - 130% of baseline) electric rates for their Tier 3 (131% - 200% of baseline) usage. The FERA program is available to households of three or more persons with total household annual gross income levels between 200% (plus \$1) and 250% of the Federal Poverty Guidelines (FPG) in accordance with D.05-10-044.<sup>2</sup> These income levels are subject to revision pursuant to the Commission's communication of its updated annual income guidelines, which are issued no later than April 1 of each year and effective June 1<sup>st</sup> of each year.

SDG&E's FERA Program implementation plan utilizes the existing procedures already developed and adopted by the Commission for the California Alternate Rates for Energy (CARE) Program. These existing protocols and procedures relate to outreach practices, enrollment, verification, and recertification activities. SDG&E uses a dual application form for the CARE and FERA program.

In D.15-07-001, which addressed issues related to residential rate reform resulting from the directives in Assembly Bill 327, the Commission revised the FERA Program and now provides qualified households with a 12% line item discount (instead of the prior benefit of billing Tier 3 usage at the Tier 2 rates). On August 24, 2015, SDG&E filed Tier 1 Advice Letter

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<sup>1</sup> FERA was originally referred to in Decision (D.) 04-02-057 as the Middle Income Large Household Program.

E-2783-E to implement 2015 residential rate design reform (including revision of the FERA line item discount) pursuant to D. 15-07-011 to become effective September 2015.

The following summarizes SDG&E's FERA Program activities for 2015.

**SAN DIEGO GAS & ELECTRIC COMPANY'S**  
**FAMILY ELECTRIC RATE ASSISTANCE (FERA) PROGRAM**  
**January 1, 2015 through December 31, 2015**

**I. PARTICIPANT INFORMATION**

**A. Provide The Total Number Of FERA Customers By Month, For The Reporting Period**

<b>TABLE 1</b>		
<b>2015</b>	<b>FERA Enrolled</b>	<b>FERA Receiving Tier 3 Benefit</b>
<b>January</b>	4,990	2,644
<b>February</b>	5,548	2,331
<b>March</b>	5,605	2,292
<b>April</b>	5,572	2,171
<b>May</b>	5,540	2,246
<b>June</b>	5,579	2,506
<b>July</b>	5,560	3,060
<b>August</b>	5,601	3,459
<b>September<sup>3</sup></b>	5,516	5,516
<b>October</b>	5,663	5,663
<b>November</b>	5,685	5,685
<b>December</b>	5,799	5,799

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<sup>2</sup> See D.05-10-044, Ordering Paragraph 3.

<sup>4</sup> D. 15-07-001 approved the restructuring of the FERA discount to be an average effective discount of 12%. For SDG&E, this change became effective September 1, 2015.

**B. Provide The Total Number Of FERA-Eligible Households, FERA-Participating Households, And FERA Household Penetration Rates By Quarter.**

<b>TABLE 2</b>			
<b>FERA Penetration Rate</b>			
<b>2015 Quarter Ending</b>	<b>(Estimated ) FERA Eligible Households</b>	<b>FERA Participating Households</b>	<b>FERA Household Penetration Rate<sup>4</sup></b>
<b>March 31</b>	47,109	5,605	12%
<b>June 30</b>	47,109	5,579	12%
<b>September 30</b>	47,109	5,516	12%
<b>December 31</b>	47,109	5,799	12%

**C. Discuss How The Estimates Of Current FERA-Eligible Households Were Developed.**

SDG&E used a customer information system count of residential customers within its territory as the basis for estimating the number of FERA-eligible households.

The estimated number of FERA-eligible households was developed by multiplying the number of residential customers, by the factor in the Annual Eligibility Update for CARE/FERA, which is 3.72% for program year 2015.<sup>5</sup>

Total Residential Customers/Estimated Eligible = FERA Eligible Households.

<sup>4</sup> The FERA Household Penetration Rate is calculated by dividing FERA Participating Households by FERA-Eligible Households. Estimated number of FERA-eligible customers is 3.72% of SDG&E's residential electric customers.

<sup>5</sup> Compliance Filing of Pacific Gas & Electric (U 39 M) on Behalf of Itself, Southern California Gas Company (U 904-G), San Diego Gas & Electric Company (U 902 M) and Southern California Edison

**D. Provide The Current FERA Sub-Metered Tenant Counts At Year-End.**

At year-end 2015, the number of sub-metered tenants participating in FERA totaled 206. Outreach and enrollment efforts for sub-metered facilities are leveraged with CARE outreach. The majority of submetered tenants submitting applications during 2015 qualified for and were enrolled in CARE instead of FERA.

**E. Discuss Any Problems Encountered During The Reporting Period Administering The FERA Program For Sub-Metered Tenants And/Or Master-Meter Customers.**

In 2015, SDG&E did not encounter problems regarding the FERA program for sub-metered tenants or the master-metered customers.

**II. PROGRAM COSTS**

**A. Discount Cost**

**1. State the average monthly FERA discount received, in dollars per FERA customer.**

2015 Average Monthly Discount per Customer = \$22.70

**2. State the cumulative annual discount for all FERA customers.**

2015 Cumulative Annual Discount = \$984,738

**B. Administrative Cost**

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

See Table 4 below.

<b>Table 4</b>	
<b>FERA Program Administrative Costs by Category and Benefits</b>	
<b>Category</b>	<b>Cost</b>
Outreach	\$9,067
Processing, Certification, and Verification	\$11,852
General Administration	\$26,105
<b>TOTAL PROGRAM COSTS</b>	<b>\$47,023</b>
<b>CUSTOMER BENEFITS</b>	<b>\$984,738</b>
<b>TOTAL PROGRAM COSTS &amp; CUSTOMER BENEFITS</b>	<b>\$1,031,762</b>

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

**Outreach**

The cost of outreach includes capitation fee payments and letter fulfillment. Capitation fees are fees paid to partner agencies that generate enrollments for the program by cross-selling FERA with their other assistance programs.

**Processing, Certification, and Verification**

The cost of processing, certification and verification consists of the labor costs to process, certify and verify FERA applications.



### **General Administration**

General administration costs include the costs associated with managing and reporting on the program.

### **Customer Benefits**

Customer benefits costs include the cost of the FERA discounts provided to customers.

### **3. Explain how costs of joint CARE/FERA activities are charged to each program.**

The costs of distinct CARE and FERA activities are charged separately to each program by using separate source codes for each program. To the extent possible, the costs of CARE/FERA activities are allocated in proportion to the work that was attributable to either CARE or FERA.

Because most CARE and FERA Program activities are integrated, most costs are shared between the programs.

### **C. Provide The Year-End December 31 Balances For The FERA Balancing Account For Both The Current And Prior Reporting Periods.**

As of December 31, 2015, there was \$47,022 in FERA administrative costs in the FERA sub-account of SDG&E's Baseline Balancing Account (BBA). The FERA sub-account records applicable costs associated with the FERA Program from its inception in 2004. The forecasted year-end 2014 balance under-collection of \$46,043 was amortized in 2015 rates and recorded to the FERA sub-account. As

of December 31, 2014, there was \$54,805 in FERA administrative costs in the FERA sub-account of the BBA.

Additionally, D. 15-07-001 authorized the restructuring of the FERA discount effective September 1, 2015. The change resulted in the establishment of the Family Electric Rate Assistance Balancing Account (FERABA), pursuant to AL 2790-E. The FERABA only records the FERA discount, whereas the FERA sub-account of the BBA records the FERA Program administrative costs. As of December 31, 2015, there was \$150,426 in FERA discounts in the FERABA.

### **III. OUTREACH**

#### **A. Discuss Utility Outreach Activities And Those Undertaken By Third Parties On The Utility's Behalf.**

##### **Mass Media**

Mass media allows SDG&E to educate and connect with its customers through diversified communication mediums designed to reach a mass audience. They serve to drive overall awareness and complement other Outreach tactics. In 2015, mass media components included print, TV, and digital media.

##### **Print Campaigns**

In-language print ads were developed for both rural and ethnic markets. Ethnic market campaigns targeted African American, Hispanic, Chinese, Vietnamese, and Filipino communities. Using SDG&E customers and employees, the English and in-language ads talked about the importance of the programs using culturally

relevant cues that resonated with the target audience. The ads ran in various ethnic and rural publications. Examples of the print ads can be found in Appendix

### **Television**

Fifteen and thirty second TV spots targeting general market and Latino audiences ran for a total of 17 weeks from April through December. Various English and Spanish television networks aired the spots, which featured real customers taking part in the programs. The spots served to create overall awareness in conjunction with other numerous direct marketing and outreach activities taking place.

### **Online Campaigns**

SDG&E used an integrated online strategy of increasing awareness for the programs and driving online submissions through paid search advertising and social media videos.

### **Ethnic Marketing**

SDG&E reached numerous ethnicities throughout the year with a variety of mass media tactics. Latino, African American, Chinese, Vietnamese, and Filipino audiences were targeted by print and digital campaigns.

### **Direct Marketing**

Direct marketing allows SDG&E to connect with individual customers through targeted tactics. In 2015, SDG&E's direct marketing tactics included direct and electronic mail campaigns, telephone campaigns, bill inserts, and door-to-door efforts.

### **Email Campaigns**

Campaigns were leveraged with the CARE and ESA Programs 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. 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 2 for sample of email creative.

### **Direct Mail Campaigns**

SDG&E used direct mail to geographically target audience segments using Athens Research and SDG&E Segmentation to identify areas with mid-high propensity for program participation. SDG&E conducted seven direct mail campaigns in 2015. The direct mail encouraged recipients to call SDG&E's CARE/FERA Interactive Voice Response (IVR) number to enroll by phone.

### **Bill Inserts**

The mandated annual CARE/FERA bilingual notification took place in July. All non-CARE customers received the bilingual application in their SDG&E bill. In addition, bilingual bill inserts were distributed in March and November through the monthly bill. See Appendix 3 for sample of bill insert.

### **Door-to-Door**

In order to target multilingual and harder to reach customers, like those from rural communities, SDG&E collaborated with The Harris Group, a Diverse Business Enterprise vendor, in order to identify, strategize and implement door-to-door campaigns in high-to-mid density, potentially eligible neighborhoods.

Contractors canvassed these neighborhoods and were able to directly interact with customers, in-language when necessary, to enroll them in the program. In 2015, door-to-door efforts resulted in 471 FERA customer enrollments.

### **Community Outreach & Engagement**

Community outreach is a key component in educating the general public about the Customer Assistance programs, as well as reaching out and engaging eligible customers. Tactics utilized by SDG&E in this area include partnerships with social service agencies and nonprofit organizations, presentations, workshops/trainings, and participation at community events.

### **CARE Partners (Capitation Agencies)**

SDG&E collaborates with social service community organizations that serve low-income and in-need clients every day. Agencies such as WIC, often referred to as central intake agencies, provide a single point of contact for client information required by a number of local, state or federally-funded customer assistance programs. In 2015, SDG&E worked closely with 20 partner agencies in order to enroll customers in the CARE and FERA Programs. These partners contributed 48 FERA Program enrollments in 2015.

### **Energy Solutions Partner Network**

SDG&E continues to work with an established network of more than 250 nonprofit and community-based organizations, collectively called the Energy Solutions Partner Network. This network helps coordinate enhanced outreach efforts, including customized messaging, social media posts, special events and promotions. Largely grassroots, multicultural, and neighborhood centric, these organizations are diverse and provide direct services to populations including seniors, special needs/disabled, low-income and young families. In 2015, over 2,000 activities were coordinated through this partner network to promote the CARE and FERA Programs.

### **Community Events & Presentations:**

Each year, SDG&E coordinates participation at hundreds of community events and presentations throughout its service area. Many of these opportunities are

requests from organizations that serve multicultural, rural, senior, and special needs audiences. While events and presentations generally do not generate large numbers of program enrollments, these tactics are important in educating and engaging organizations that serve these audiences. In 2015, SDG&E promoted the Customer Assistance solutions, including the FERA Program, at approximately 1,700 presentations and events.

### **Integration Efforts**

Integration efforts represent the combined efforts of internal resources to raise program awareness and create a positive customer experience. In 2015, integration efforts included SDG&E's interactive voice response (IVR) system, Energy Service Specialists (ESS), branch offices, field collectors, collection calls, and informational brochures.

### **Customer Contact Center**

SDG&E's Customer Contact Center assists thousands of customers with a variety of energy inquiries. While waiting to speak with an ESS, customers are provided information about the CARE, FERA and ESA Programs in both English and Spanish. Customers are provided an option of requesting a CARE application through this process as well. In addition, the CARE program has a dedicated IVR that allows customers to call and enroll in the program. The IVR asks a series of questions used to determine eligibility for the program while customers interact using the touch-tone keypad on their phone. The system offers English and

Spanish options and, in 2015, 40 FERA program enrollments resulted from the IVR.

### **Branch Offices**

The Customer Assistance team and the company's bill payment locations, which include SDG&E's branch offices, continually collaborate and promote applicable solutions for customers. The Outreach team also regularly engages branch office staff to provide training and presentations on the CARE, FERA and ESA Programs. Additionally, fifteen customer engagement fairs were held at branch office locations on high-traffic days to help customers enroll in CARE and FERA. In 2015, Branch Offices contributed 35 FERA program enrollments.

### **Field Collection**

SDG&E field collectors deliver notices to customers facing disconnection due to non-payment. Collectors are educated about the CARE and FERA programs and include program applications as part of their notification 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. A sample letter is included in Appendix 4.



### **Informational Brochures**

Brochures, featuring other energy-saving solutions, continue to include information on the customer assistance programs.

#### **B. Discuss Each Of The Following:**

**1. How FERA 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.**

FERA information is distributed in conjunction with the CARE program. Both FERA and CARE are promoted through a joint application form. All outreach efforts for FERA are combined with the CARE program outreach. For example, all targeted direct mail and telephone campaigns promote the FERA Program through the joint application form. Customers entering income that exceeds the CARE guidelines but are within the FERA guidelines are appropriately enrolled in FERA. Additionally, customer data received from the Energy Savings Assistance Program regarding potentially eligible customers are shared with the FERA Program.

SDG&E also leverages FERA program information with SDG&E's Middle Income Direct Install (MIDI) Program. The MIDI Program leverages income verification practices, as well as FERA verification documentation, for the purpose of simplifying enrollment processes for customers participating in the

MIDI Program. Contractors conducting outreach for MIDI also inform customers about the CARE, FERA and ESA programs.

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

FERA Program marketing, education and outreach efforts are leveraged with CARE Program efforts. CARE Program outreach is highly targeted to lower income areas with a number of tactics utilized to connect with potentially eligible customers including mass media campaigns, direct mail, email, automated voice messaging, print advertising, door-to-door canvassing, social media, events, presentations and workshops.

Enrollments in the FERA Program result from customer ineligibility in the CARE Program, with customer qualification based on household size and eligibility information within the FERA guidelines. This process does not result in a large quantity of FERA customer enrollments. For example, in 2015, SDG&E received over 122,000 eligible applications, of which approximately 3,185 were received as FERA applications.

#### IV. PROCESSING FERA APPLICATIONS

##### A. Processing Self-Certification And Self-Recertification Applications (Individual And Sub-Metered Customers)

1. Provide the number of utility and third-party FERA self-certification and self-recertification applications provided, received, approved, denied, pending/never completed, or duplicates for the reporting period.

Table 5						
FERA Self-Certification and Self-Recertification Applications						
	Provided <sup>6</sup>	Received	Approved <sup>7</sup>	Denied	Pending/ Never Completed	Duplicates
Utility	2,363,674	3,609	3,078	34	0	497
Capitation		54	33	2	0	19
Other Third-Party		81	71	5	0	5
<b>Total</b>		3,744	3,182	41	0	521

##### B. Processing Random Post-Enrollment Verification Requests

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

	Requested	Received <sup>8</sup>	Approved	Denied <sup>9</sup>	Pending/Never Completed
<b>Total</b>	2	90	79	11	0

<sup>6</sup> The FERA and CARE applications are joint applications. This number represents an estimate of all applications provided. Includes the number of applications (paper, internet, and phone) SDG&E provided for all direct mailing campaigns, email campaigns, phone enrollment campaigns, and other outreach methods. Because there are other means by which customers obtain applications which are not counted, this number is only an approximation and it reflects duplicate applications provided through marketing and outreach efforts.

<sup>7</sup> Approved includes CARE ineligible applications that are eligible for FERA.

<sup>8</sup> Received and Approved includes CARE ineligible Post Enrollment Verification Requests that are eligible for FERA.

<sup>9</sup> Denied includes FERA ineligible Post Enrollment Verification Requests that are eligible for CARE.

## V. PROGRAM MANAGEMENT

### A. Discuss Issues And/Or Events That Significantly Affected Program Management In The Reporting Period And How These Were Addressed.

In Rulemaking (R.) 12-06-013,<sup>10</sup> the Commission examined revisions to residential rate design which included a re-examination of FERA.<sup>11</sup> D.15-07-001 restructured the FERA discount to an average effective line-item discount of 12% applicable to all tiers. The change became effective as of September 2015. SDG&E worked closely with its customer contact employees and outreach contractors to educate them about the changes to the FERA program discount. All FERA program collateral materials are being updated to reflect the changes to the FERA program line item discount.

In D. 15-07-001, the Commission articulated its plan to conduct a third phase of its Residential Rate Reform proceeding which will include consideration on how the FERA program could be modified to help large households conserve. A workshop will be held at the start of Phase 3 to determine the extent to which CARE restructuring should be included in the scope.<sup>12</sup>

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<sup>10</sup> OIR on the Commission's Own Motion to Conduct a Comprehensive Examination of Investor-Owned Electric Utilities' Residential Rate Structures, the Transition to Time Varying and Dynamic Rates and Other Statutory Obligations.

<sup>11</sup> In D. 04-02-057, the Commission adopted the FERA program (formerly referred to as the Large Household Tier 3 Exemption program) where households of 3 or more with household incomes between 201% and 250% of the Federal Poverty Guidelines would qualify for their Tier 3 usage to be billed at Tier 2 rates.

<sup>12</sup> D. 15-07-001 at p.6.

# **APPENDIX 1-4**

## **FERA Program**

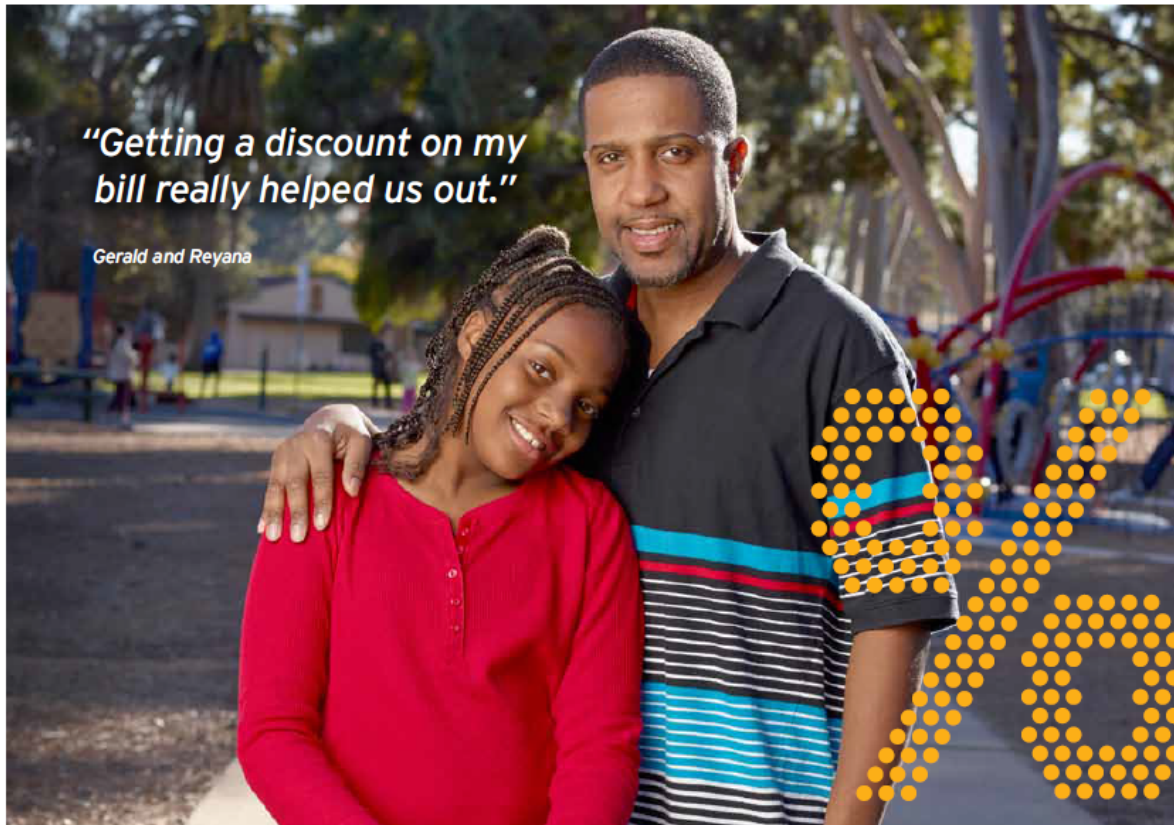
# **APPENDIX**

## **FERA Program:**

- 1. Sample Print Ads**
- 2. Sample Email Campaign**
- 3. Sample Bill Insert**
- 4. Sample Credit and Collections Notices**

## Appendix 1 - Sample English Print Ad

4SDG012025\_\_CAREPrint\_\_SanDiegoUnionTribune-INDEPTHSECTION\_\_Run:06\_08\_14\_\_10x10.75



*"Getting a discount on my  
bill really helped us out."*

Gerald and Reyana

### **connected** ..... **to what matters**

Our CARE Program offers an easy way to receive a discount of at least 20% off your monthly energy bill. If you're on a limited income or have recently lost your job, you may be eligible.

Gerald saved on his bill and you can too. To see if you qualify for CARE or other programs that can help you save energy and money, **call 211 or connect with us at [sdge.com/care](http://sdge.com/care).**

\*This program is funded by California utility customers and administered by San Diego Gas & Electric® under the auspices of the California Public Utilities Commission.



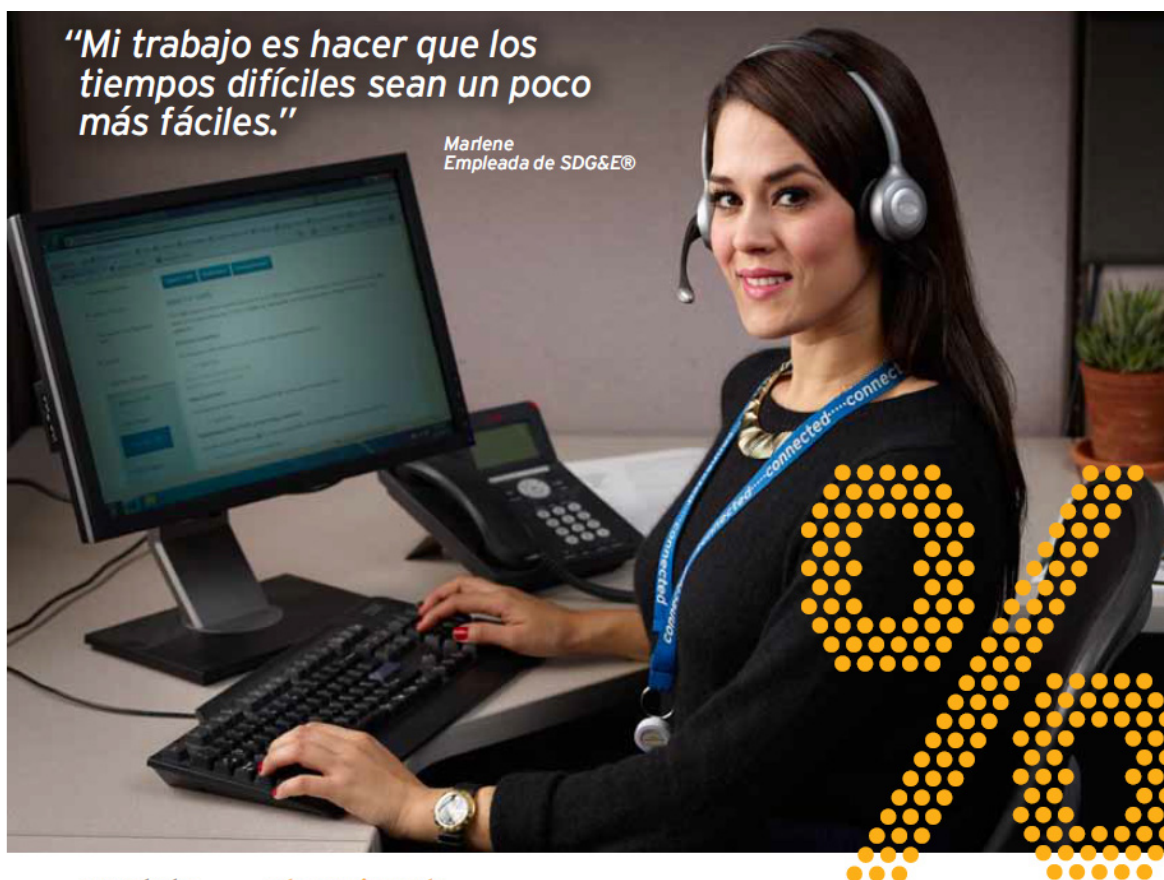
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4SDG012025\_CARE\_Pttrn\_SDUT\_10x10.75.indd 1

4/25/14 4:29 PM

## Appendix 1 (Continued) - Sample Spanish Print Ad



**conectados ..... a lo que importa**

A veces cubrir los gastos diarios puede ser desafiante. A través de nuestro Programa CARE puede recibir un descuento de cuando menos el 20% en su factura mensual de energía. Si tiene un ingreso limitado o perdió recientemente su trabajo, tal vez reúna los requisitos.

Nuestros representantes CARE, como Marlene, pueden ayudarle a ahorrar en su factura de energía. Para ver si tiene derecho a CARE u otros programas que pueden ayudarle a reducir sus costos de energía, llame al **211** o visite **sdge.com/ahorro**.

\*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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Appendix 1 (Continued) – Sample Vietnamese Print Ad



*“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 thành linh 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 lên đến 20% trên hoá đơn năng lượng. 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](http://sdge.com/Vietnamese) hay gọi 211.

**SDGE<sup>connected</sup>**  
Semptra Energy utility®

Chương trình này được tài trợ bởi khách hàng thiện ích của California và quản lý bởi San Diego Gas & Electric® dưới sự bảo trợ của California Public Utilities Commission.  
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## Appendix 1 (Continued) –Sample Chinese Print Ad



「我們可幫您節省20%  
的能源費用。」

- Alton, SDG&E®員工

**connected .....連接省錢**

「就連下班了,我也會隨時隨地跟大家介紹我們的計劃。我真的很希望大家能好好利用這個省錢的機會,尤其它比過去更容易申請了。」

事實上,您和家人從今天起就能過得更舒適。您可用每月省下的錢來支付重要的家用開銷,如伙食、交通和住房。

只要您符合我們的CARE計劃,您每個月就可在SDG&E®帳單上得到20%折扣,平均一年可節省\$275。

SDG&E致力於服務社區,讓您省錢省心,好好照顧自己和家人。

如果您的收入有限,或最近失業,您可能符合CARE計劃。想知道您是否符合資格,請上網到 [sdge.com/Chinese](http://sdge.com/Chinese) 或致電 211。

**SDG&E connected**  
A Sempra Energy utility®

本計劃由加州能源客戶資助。San Diego Gas & Electric® 聖地牙哥瓦斯及電力公司管理。加州公用事業委員會負責監督。  
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Appendix 1 (Continued) - Sample Filipino Print Ad



*"Did you know that you could save at least 20% on your energy bill?"*

*- Marianne, SDG&E® employee*

**connected ..... to savings**

*"Everyone likes to save money. But most people don't believe how much they can actually save."*

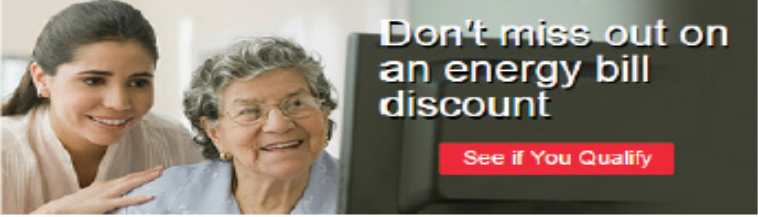
Every little bit helps. It's easy. All you need to do is apply to see if you're eligible for savings. Through our CARE Program, you get at least 20% off your monthly SDG&E bill. This leaves extra money for food, transportation and housing – you name it. Since you work hard to make a good life for you and your family, let us help to put some money back into your wallet.

If you're on a limited income or recently lost your job, you may be eligible for the CARE Program. To see if you qualify, connect at [sdge.com/Filipino](http://sdge.com/Filipino) or call 211.

**SDGE<sup>connected</sup>**  
**Sempra Energy utility®**

This program is funded by California utility customers and administered by San Diego Gas & Electric® under the auspices of the California Public Utilities Commission.  
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**Don't miss out on an energy bill discount**

[See if You Qualify](#)

**You may qualify for at least a 20% savings on your energy bill**

Through the California Alternate Rates for Energy (CARE) program and the Energy Savings Assistance Program, eligible families can save at least 20% on their energy bill as well as receive free home improvements or appliances. With new income guidelines in place, more families are now eligible.

[Start the Application](#)

*You will need your 10 digit account number found on your SDG&E bill.*

To learn more, connect at [sdge.com/care](http://sdge.com/care)

**To qualify you must meet the income guidelines or belong to any of the programs listed below:**

[View the income table](#) and see if you qualify:

Qualifying Assistance Programs	
Medicaid/Medi-Cal (Under 65)	Women, Infants and Children (WIC)
Medicaid/Medi-Cal (Over 65)	National School Lunch Program (NSLP)
Medi-Cal for Families A & B	Supplemental Security Income (SSI)
CalFresh (Food Stamps) / SNAP	CalWORKs (TANF) or Tribal TANF
Head Start Income Eligible (Tribal Only)	Low-Income Home Energy Assistance Program (LIHEAP)
Bureau of Indian Affairs (General Assistance)	

[Start Saving Today](#)

**More about the CARE Program**

- > Over 280,000 customers are receiving a monthly energy bill discount. Eligibility is based on household size and total household income or if you're participating in certain public assistance programs. If you qualify you could also be eligible for free energy-efficient home improvements. [Watch the video](#)

**More about the Energy Savings Assistance Program**

- > Qualifying renters or home-owners may be able to receive free home improvements and energy-efficient appliances that make their home more comfortable and save them money now and for years to come. [Watch the video](#)

**If you have any questions or would like more information on ways to lower your bill, please [email us](#) or call 1-800-411-7343**

[Apply](#)      [Qualifications](#)      [Overview](#)

This email has been sent to [sobadoza@semprautilities.com](mailto:sobadoza@semprautilities.com) as a promotional communication. If you'd rather not receive emails like this, please [click here to opt-out or manage your preferences](#).

Having trouble seeing images, [click here](#) to view the web-version.

\*As long as the residence was not previously served by the program. This program is funded by California utilities 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 good 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 good and services.

\*\*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.

### Appendix 3 - Sample Bill Insert

# SDG&E's FERA Report January 1 – December 31, 2015



**BUSINESS REPLY MAIL**  
FIRST-CLASS MAIL PERMIT NO. 1117 SAN DIEGO, CA  
ATTN: CARE PROGRAM  
SAN DIEGO GAS & ELECTRIC  
SOLAR ENERGY  
SAN DIEGO CA 92112-9985

POSTAGE WILL BE PAID BY ADDRESSEE

**SDG&E - General Information**  
1-800-411-7343  
sdge.com

## Save energy

**Energy Savings Assistance Program**  
Free energy-saving home improvements  
1-866-597-0597  
sdge.com/energyassistance  
**Energy Savings Assistance Program\***

**Home rebates**  
Rebates on energy-efficient products for your home  
1-800-644-6333  
sdge.com/rebates

**My energy survey**  
Free online analysis can show you ways to save  
1-800-644-6333  
sdge.com/survey

## Save money

**CARE**  
Monthly discount  
1-800-411-7343  
sdge.com/care  
**FERA**  
Electricity within certain usage levels is billed at a lower rate  
1-800-411-7343  
sdge.com/fera  
**Medical Baseline**  
More energy at the lowest rates for customers with medical conditions  
1-800-411-7343  
sdge.com/medicalbaseline

## Get extra help

**Level your energy bill payments every month**  
1-800-411-7343  
sdge.com/levelpay  
**Bill payment assistance and other community resources**  
Dial "211"  
211sandiego.org

**LINEAP**  
State-funded bill payment assistance and weatherization services. Call the Department of Community Services and Development 1-866-675-6623 or call 2-1-1 for referral to a local agency.

**California Lifeline**  
Discounted telephone service. Call your service provider.  
cpuc.ca.gov

**SDG&E - Información general**  
1-800-311-7343  
sdge.com/espanol

## Ahorre energía

**Energy Savings Assistance Program**  
Mejoras gratuitas que ahorran energía en el hogar  
1-866-597-0597  
sdge.com/casa  
**Energy Savings Assistance Program\***

**Reembolsos para el hogar**  
Reembolsos en productos eficientes en energía para su hogar  
1-800-644-6333  
sdge.com/reembolsos  
**Análisis de mi Consumo de Energía**  
Llame al 1-800-644-6333 para obtener más información

## Ahorre dinero

**CARE**  
Descuento mensual  
1-800-311-7343  
sdge.com/ahorro  
**FERA**  
La electricidad dentro de ciertos niveles de consumo se factura a una tarifa más baja  
1-800-311-7343  
sdge.com/ahorro  
**Asignación Médica Inicial**  
Más energía a las tarifas más bajas para clientes con enfermedades  
1-800-311-7343  
sdge.com/medicinal

## Obtenga ayuda adicional

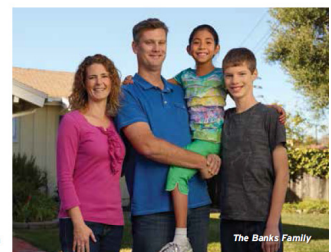
**Nivele los pagos mensuales de su factura de energía**  
Llame al 1-800-311-7343 y prepárese por el Plan de Pago Nivelado (Level Pay Plan)  
**Asistencia para el pago de la factura y otros recursos de la comunidad**  
Marque "211"  
211sandiego.org  
**LINEAP**  
Programa de asistencia para el pago de la factura y para impermeabilización, financiados por el estado. Llame al Departamento de Servicios y Desarrollo de la Comunidad al 1-866-675-6623 o llame al 2-1-1 para que le remitan a una agencia de la localidad.  
**California Lifeline**  
Servicio telefónico con descuento. Llame a su proveedor de servicio.  
cpuc.ca.gov



Save on your  
**SDG&E® bill.**  
Residential Rate Assistance

Ahorre en la factura  
de SDG&E®.  
Asistencia tarifaria residencial

## Application/Formulario de Solicitud



It's easy to apply for SDG&E assistance programs. We offer two programs that may lower your monthly bill.

- California Alternate Rates for Energy (CARE)** The CARE program offers a monthly discount on SDG&E bills for qualifying households. Qualification is based on total income of everyone living in the home (See the income guidelines below) OR participation in a qualifying public assistance program.
- Family Electric Rate Assistance (FERA)** If you do not qualify for the CARE program, you may still qualify for the FERA Program, which offers a monthly discount on electric bills for household of 3 or more people with a slightly higher income than required for CARE. See the FERA income Guidelines listed below to find out if you qualify.

## Rules for CARE and FERA participation

- You must notify SDG&E if you no longer qualify.
- You may be asked to verify your income.
- You must renew your enrollment when requested.
- You may not be claimed on another person's income tax return other than your spouse.
- The SDG&E\* bill must be in your name and the address must be your primary residence.
- Your total current household income (all income, including housing and military subsidies, for all persons living in your home before deductions must be within the income levels in the chart for your household size OR your household is receiving benefits from one of the public assistance programs listed on the application in Box 2A.

Other ways to apply: sdge.com/care or call 211. If you have questions or would like more information about customer assistance please email info@sdge.com. For speech- or hearing-impaired customers TDD/TTY is available at 1-877-889-7343.

INCOME QUALIFICATION FOR CARE & FERA PROGRAMS			
Number in Household	CARE Total Annual Household Income*	FERA Total Annual Household Income*	
1 or 2	\$31,460	Not Eligible	
3	\$39,580	\$39,581 - \$49,475	
4	\$47,700	\$47,701 - \$59,425	
5	\$55,820	\$55,821 - \$69,775	
6	\$63,940	\$63,941 - \$79,925	
7	\$72,060	\$72,061 - \$90,075	
8	\$80,180	\$80,181 - \$100,225	
Each Additional Person, add	\$8,120	\$8,120 - \$10,150	

\*Effective June 1, 2014 - May 31, 2015

Es fácil presentar una solicitud para los programas de asistencia de SDG&E. Ofrecemos dos programas que pueden reducir su factura mensual.

- Tariffas Alternas para Energía en California (CARE)** El programa CARE ofrece un descuento mensual en las facturas de SDG&E a los hogares que reúnen los requisitos. Los requisitos se basan en el ingreso total de cada uno de las personas que vive en el hogar (vea las pautas de ingreso en la parte inferior) o en su participación en un programa de asistencia pública que le da derecho a participar.
- Programa familiar de Reducción de Tarifas Eléctricas (FERA)** Si no reúne los requisitos para el programa CARE, tal vez sí reúna los requisitos para el Programa FERA, que ofrece un descuento mensual en las facturas eléctricas de los hogares con 3 o más personas cuyo ingreso es ligeramente más alto que el que se requiere para CARE. Vea las Pautas de ingreso de FERA que aparecen a continuación para averiguar si reúne los requisitos.

## Reglas de participación para CARE y FERA

- Tiene que notificar a SDG&E si ya no reúne los requisitos.
- Le pueden pedir que compruebe su ingreso.
- Debe renovar su solicitud cuando le sea requerido.
- No puede aparecer usted en la declaración del impuesto sobre el ingreso de otra persona que no sea su cónyuge.
- La factura de SDG&E\* debe estar a su nombre y el domicilio debe ser su residencia principal.
- El ingreso total anual en el hogar (todo el ingreso, incluido subsidios militares y de vivienda de todas las personas que viven en su casa, antes de deducciones, debe estar dentro de los niveles de ingreso correspondientes al número de personas que viven en su casa y que aparecen en el cuadro B su hogar debe estar recibiendo beneficios de uno de los programas de asistencia pública indicados en el cuadro 2A del formulario.

Otras formas de solicitar: sdge.com/care o llamando a 211. Si tiene preguntas o desea obtener más información sobre asistencia al cliente, por favor envíe un mensaje a info@sdge.com. Para los clientes con problemas auditivos o del habla, hay TDD/TTY llamando al 1-877-889-7343.

REQUISITOS DE INGRESO PARA LOS PROGRAMAS CARE Y FERA			
Número de personas	CARE que viven en el hogar Ingreso total anual en el hogar*	FERA que viven en el hogar Ingreso total anual en el hogar*	
1 or 2	\$31,460	No reúne los requisitos	
3	\$39,580	\$39,581 - \$49,475	
4	\$47,700	\$47,701 - \$59,425	
5	\$55,820	\$55,821 - \$69,775	
6	\$63,940	\$63,941 - \$79,925	
7	\$72,060	\$72,061 - \$90,075	
8	\$80,180	\$80,181 - \$100,225	
Por cada persona adicional	\$8,120	\$8,120 - \$10,150	

\*En vigor del 1 de junio de 2014 al 31 de mayo de 2015

Your Name \_\_\_\_\_ Your Number \_\_\_\_\_ Home Telephone \_\_\_\_\_ Teléfono de casa \_\_\_\_\_

Home Address, Apartment, City, Zip Code \_\_\_\_\_ Número y calle, Apartamento, Ciudad, Código postal \_\_\_\_\_ Email Address \_\_\_\_\_ Dirección de correo electrónico \_\_\_\_\_

SDG&E Account Number \_\_\_\_\_ Número de cuenta de SDG&E \_\_\_\_\_

**1 Household Information:** Please complete  
Number of persons in your household: Adults  + Children:  +  +   
Please complete either section 2A OR 2B, then go to section 3

**2A Public Assistance Programs:** (For CARE Program Only)  
If you or someone in your household receives benefits from any of the following public assistance programs check all that apply. Fill out section 2A or 2B. You do not need to complete both sections.

☐ Medicaid/Medi-Cal - Under 65 ☐ Women, Infants and Children program (WIC)  
☐ Medicaid/Medi-Cal - Over 65 ☐ National School Lunch Program (NSLP)  
☐ Medi-Cal for Families A & B ☐ CalFresh (Food Stamps)/SNAP  
☐ Head Start Income Eligible (Child Only)  
☐ Bureau of Indian Affairs General Assistance ☐ Low Income Home Energy Assistance Program (LIHEAP)  
☐ Supplemental Security Income (SSI) ☐ Supplemental Security Income (SSI)  
☐ CalWORKS (TANF) or Tribal TANF ☐ CalWORKS (TANF) or Tribal TANF

**2B Household Income Eligibility:** (For CARE or FERA Program)  
If your household does not participate in a public assistance program, please check all sources of household income for all members of the household and write the total income in the space provided

☐ Wages and/or profits from self employment ☐ Scholarships, grants or other aid for living expenses  
☐ Rent or royalty income ☐ Interest/dividends from savings, stocks, bonds or retirement accounts  
☐ Pensions ☐ Spousal or child support  
☐ Social Security ☐ Insurance or legal settlements  
☐ SSI or SSDI ☐ Disability or workers' compensation payments  
☐ Unemployment benefits ☐ Cash or other income  
☐ Housing or military subsidies ☐ Unemployment benefits

Total household income: \$

**3 Declaration:** (please read and sign below)  
I state the information I have provided in this application is true and correct. I agree to provide proof of income if asked. I agree to inform SDG&E if I no longer qualify to receive the discount. I know that if I receive any discount without qualifying for it, I may be required to pay back the discount I received. I understand that SDG&E can share my information with other utilities or their agents to enroll me in their assistance programs.

\* Customer Signature \_\_\_\_\_ Firma del cliente \_\_\_\_\_ Date \_\_\_\_\_ Fecha \_\_\_\_\_

## Información de su hogar:

Number of persons in your household: Adults  + Children:  +  +   
Per favor llene ya sea la sección 2A o 2B, y luego vaya a la sección 3

## Programas de Asistencia Pública:

Si usted o alguien en su hogar recibe beneficios de cualquiera de los siguientes programas de asistencia pública, marque todos los que correspondan. Llene la sección 2A o 2B. No necesita llenar ambas secciones.

- ☐ Medicaid / Medi-Cal - Menor de 65 años
- ☐ Medicaid / Medi-Cal - Mayor de 65 años
- ☐ Medi-Cal para Familias A y B
- ☐ CalFresh (Cupones de comida)/SNAP
- ☐ Ingreso elegible para Head Start
- ☐ Bureau of Indian Affairs General Assistance
- ☐ CalWORKS (TANF) or Tribal TANF
- ☐ Program for Women, Infants and Children (WIC)
- ☐ National School Lunch Program (NSLP)
- ☐ Escuelas (NSLP)
- ☐ Programa de Asistencia a Hogares de Escuelas (LIHEAP)
- ☐ Programa de Seguro Suplementario (SSI)
- ☐ CalWORKS (TANF) or Tribal TANF

## Requisitos de ingreso en el hogar:

Si su hogar no participa en un programa de asistencia pública, por favor marque todas las fuentes de ingreso del hogar para todos los miembros del hogar, y escriba el ingreso total en los espacios señalados.

- ☐ Salarios y/o utilidades por autoempleo
- ☐ Ingresos por alquiler o regalías
- ☐ Pensiones
- ☐ Seguro Social
- ☐ SSI o SSDI
- ☐ Pagos por incapacidad o indemnización para los trabajadores
- ☐ Beneficios de desempleo
- ☐ Becas, subvenciones u otra ayuda para sufragar el costo de la vida
- ☐ Intereses/dividendos de ahorros, acciones, bonos o cuentas para el retiro
- ☐ Pensión conyugal o alimenticia
- ☐ Indemnizaciones de seguro o indemnizaciones legales
- ☐ Ingreso en efectivo o de otro tipo
- ☐ Subsidios militares y de vivienda

Ingreso total anual en el hogar: \$

## Declaración:

Declaro que la información que proporcioné en este formulario de solicitud es verdadera y correcta. Conviene proporcionar comprobantes de ingreso si me son solicitados. Conviene informarme a SDG&E si de alguna manera los requisitos necesarios para recibir el descuento. Entiendo que si recibo algún descuento sin reunir los requisitos para el mismo, tal vez se me exija devolver el importe del descuento que recibí. Entiendo que SDG&E puede compartir mi información con otras empresas de servicios públicos o con sus agentes para inscribirme en sus programas de asistencia.

## Appendix 4 – Sample Credit and Collections Notices

Account:  
Date Mailed:

Service Address:

### **This is the final notice before your service is shut off**

Your immediate attention is needed to avoid having your service shut off. Please pay \$XXX.XX before MM/DD/YY.

If your service is shut off for non-payment all past due amounts you owe must be paid before we can restore your service. You'll be billed for charges to re-establish service and you may be required to pay a deposit amount equal to twice the highest monthly SDG&E® bill in the past twelve months.

You can make your payment a number of different ways:

- Online at [sdge.com/myaccount](http://sdge.com/myaccount). There's no charge to pay online.
- On the phone by calling 1-800-386-0067. With BillMatrix you can use your Visa/MasterCard, Debit/ATM Card or electronic check.
- In person at one of our authorized payment locations or branch offices. Find one online at [sdge.com/residential/payment-locations](http://sdge.com/residential/payment-locations).
- With your phone using our mobile app. Visit [sdge.com/mobileapps](http://sdge.com/mobileapps) to get started.

Please have your account number handy if you decide to pay online or through BillMatrix. Your account number is at the top and bottom of this letter.

This is an urgent request so we ask that you please do not mail your payment. If your payment is returned because of insufficient funds, your service is subject to immediate shut off.

You may be eligible for financial assistance, our Level Pay Plan, payment arrangements and other income-qualified programs or discounts. Our Energy Service Specialists are here to help you. You can call us at 1-800-411-7343.

Si necesita ayuda para interpretar este aviso llámenos a 1-800-311-7343.

Please note – If you made a payment for the amount referenced above within the last few days or recently made a payment arrangement with us, please disregard this notice.

	<b>DATE DUE</b>	MM/DD/YY
<b>ACCOUNT NUMBER:</b>		
<b>1234567890</b>		