

**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.	Application 14-11-007 (Filed November 18, 2014)
Application of San Diego Gas & Electric Company (U 902 M) for Approval of Low-Income Assistance Programs and Budgets for Program Years 2015-2017.	Application 14-11-009 (Filed November 18, 2014)
Application of Pacific Gas and Electric Company for Approval of the 2015-2017 Energy Savings Assistance and California Alternate Rates for Energy Programs and Budget (U 39 M).	Application 14-11-010 (Filed November 18, 2014)
Application of Southern California Gas Company (U 904 G) for Approval of Low-Income Assistance Programs and Budgets for Program Years 2015-2017.	Application 14-11-011 (Filed November 18, 2014)

**ANNUAL REPORT ACTIVITY OF SAN DIEGO GAS & ELECTRIC COMPANY
(U 904 G) ON LOW INCOME ASSISTANCE PROGRAMS FOR 2014**

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May 01, 2015

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This report presents the results and expenditures for San Diego Gas & Electric Company (SoCalGas') California Alternate Rates for Energy (CARE) program and Energy Savings Assistance Program (ESA) for program year 2014. The purpose of this report is to consolidate activity for the CARE and ESA Programs, and provide the California Public Utilities Commission's Energy Division with all the necessary information in analyzing the low-income programs.

Respectfully Submitted,

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SAN DIEGO GAS & ELECTRIC COMPANY

**ANNUAL REPORT ACTIVITY
ON LOW INCOME ASSISTANCE PROGRAMS**

**Energy Savings Assistance Program
And
California Alternate Rate for Energy Program**

2014 RESULTS

LOW INCOME ASSISTANCE PROGRAMS ANNUAL REPORT

TABLE OF CONTENTS

Title	Page
1. ENERGY SAVINGS ASSISTANCE PROGRAM EXECUTIVE SUMMARY	2
1.1. Alignment of Energy Savings Assistance Program with Strategic Plan Goals and Strategy	3
1.2. Energy Savings Assistance Program Overview	9
1.3. Marketing, Education, and Outreach.....	10
1.4. Energy Savings Assistance Program Customer Enrollment	12
1.5. Disability Enrollment Efforts.....	13
1.6. Leveraging Success, Including LIHEAP.....	17
1.7. Integration Success	19
1.8. Workforce Education & Training	23
1.9. Legislative Lighting Requirements Status.....	24
1.10. Studies	25
1.11. Pilots.....	35
1.12. “Add Back” Measures	35
1.13. Low Income Working Groups	36
1.14. Annual Public ESA Program and CARE Meeting	39
2. CARE EXECUTIVE SUMMARY.....	40
2.1. Participant Information.....	42
2.2. CARE Program Summary.....	48
2.3. CARE Program Costs	49
2.4. Outreach	52
2.5. Processing CARE Applications.....	67
2.6. Program Management.....	68
2.7. Pilots.....	69
2.8. Studies	70
3. CARE EXPANSION PROGRAM.....	70
3.1. Participant Information.....	70
3.2. Usage Information	71
3.3. Program Cost.....	71
3.4. Outreach	71
3.5. Program Management.....	73
4. FUND SHIFTING	73

5. COMMONLY USED ACRONYMS.....	74
6. APPENDIX 1-5.....	77
7. APPENDIX: ENERGY SAVINGS ASSISTANCE PROGRAM TABLES AND CARE TABLES	88

ENERGY SAVINGS ASSISTANCE PROGRAM ANNUAL REPORT

1. ENERGY SAVINGS ASSISTANCE PROGRAM EXECUTIVE SUMMARY

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

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

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

The long-term California Energy Efficiency Strategic Plan (Strategic Plan) lays out two goals in achieving the vision: 1) By 2020, all eligible customers will be given the

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

² D. 07-12-051 at p. 2.

³ *Id.*

opportunity to participate in the ESA Program; and, 2) The ESA Program will be an energy resource by delivering increasingly cost effective and longer-term savings.

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

This report provides information on SDG&E's ESA Program accomplishments and expenditures for PY 2014. In 2014, the ESA Program treated 22,039 homes, or 108% of the 2014 goal. The program spent \$19,143,282 representing 71% of its authorized 2014 budget. At year end, there was a total of \$7,761,706 in unspent 2014 gas and electric ESA Program funds. In addition, SDG&E has \$12,316,528 in unspent electric and gas funds from pre-2014 program years. The cumulative unspent electric and gas funds are \$20,078,234, which represents both 2014 and prior program years' unspent funds. These unspent funds represent \$10,079,864 in electric carryover funds and \$9,998,370 in gas carryover funds from 2014 and prior years. SDG&E plans to carryover and use these funds during the 2015-2017 program cycle.

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

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

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

Implementation Plan and Timeline		
Strategies	Term 2012 - 2014	IOU strategy employed this program year
1: Strengthen program outreach using segmentation analysis and social marketing tools.	<ul style="list-style-type: none"> Implement energy education designed to help customers understand and change behaviors in ways that support ESA savings. 	<ul style="list-style-type: none"> As part of the in home assessment, customers take part in energy education. The energy education booklet continues to be used as a tool for this process. The leave-behind booklet includes information on energy costs and behavioral changes that can lead to a reduction in energy and water costs. It also includes appliance safety tips and information. The booklet is available in both English and Spanish versions.
1.2: Develop a recognizable and trustworthy Brand/Tagline for the programs.	<ul style="list-style-type: none"> Launch integrated EE/ESA/DSM brand. 	<ul style="list-style-type: none"> The development of the statewide program name was completed during the 2009-2011 program cycle. In 2011, the Commission directed the investor-owned utilities (IOUs) to commence using the new program name now known as Energy Savings Assistance Program. <p>Assigned Commissioner Ruling issued October 13, 2011 directed the IOUs to cease Engage 360 statewide branding efforts.</p> <p>In D.12-05-015, the Guidance Decision, it directed the utilities to discontinue the use of the Engage 360 brand and to develop a strategy and budget for transitioning toward the use of “Energy Upgrade California” (EUC) as a statewide umbrella brand. It also directed the</p>

Implementation Plan and Timeline		
Strategies	Term 2012 - 2014	IOU strategy employed this program year
		utilities to utilize unspent funds from the Engage 360 campaign toward expenditures for EUC ME&O, web portal maintenance, and limited augmentation of programs related to EUC during 2012.
1.3: Improve program delivery	<ul style="list-style-type: none"> • Use information from segmentation analysis to achieve efficiencies in program delivery. • Leverage with Local, State, and Federal agencies as well as other organizations to increase seamless coordination, efficiency and enrollment. 	<ul style="list-style-type: none"> • SDG&E uses Athens Research data with SDG&E's own residential segmentation (based on account usage and history) to identify high opportunity areas to target for outreach efforts. In conjunction with direct marketing tactics, SDG&E also identifies high population density of targeted audiences (i.e., seniors) by zip code and targeted customers within these opportunity areas through Community based outreach activities. • ESA Program continues to leverage services with the California Department of Community Services and Development's Low Income Home Energy Assistance Program agencies (MAAC and Campesinos Unidos, Inc.) and overlapping customers with Southern California Gas Company to serve customers under both programs, providing customers with more measures and driving efficiencies in the programs.

Implementation Plan and Timeline		
Strategies	Term 2012 - 2014	IOU strategy employed this program year
1.4: Promote the growth of a trained Energy Savings Assistance Program workforce.	<ul style="list-style-type: none"> • Implement Energy Savings Assistance Program workforce education and training. • Coordinate resources for training related to ESA program needs to ensure delivery of ESA-trained resources to the program. 	<ul style="list-style-type: none"> • In December of 2014, SDG&E entered into a service agreement with La Coopertiva to develop training for its ESA Program assessors. La Coopertiva will review other IOUs current training programs for best practices. The training will be offered at the Center for Employment Training (CET) facilities in San Diego. CET will also provide a feeder network of potential candidates for training. <p>In 2014, customer service training was provided to 200+ office and field employees of 15 ESA contractors in the 2nd and 3rd quarters of the year. The Customer Experience Survey conducted the month after the initial training resulted in an increase from 58% to 64% “Excellent” rating for the ESA Program. At year end, the ESA Program achieved an overall combined customer satisfaction rating of 96%. The 96% included, ‘Excellent’, “Very Good”, and “Good” responses.</p>

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

Implementation Plan and Timeline		
Strategies	Term 2012 - 2014	IOU strategy employed this program year
2.1: Increase collaboration and	<ul style="list-style-type: none"> • Continue to expand partnerships with 	<ul style="list-style-type: none"> • Continued referring leads between the ESA Program and

Implementation Plan and Timeline		
Strategies	Term 2012 - 2014	IOU strategy employed this program year
leveraging of other low-income programs and services	stakeholders and seek new opportunities for data sharing.	<p>the Middle-Income Direct Install (MIDI) Program. ESA Program applicants who were identified as over-income were referred to the MIDI Program, and MIDI Program applicants who met the ESA Program guidelines were referred to the ESA Program.</p> <p>ESA Program continued to collaborate with the Multi-Family Energy Efficiency Rebate (MFEER) program to better serve the qualifying customers in multi-family units and ensure they receive all feasible measures from both programs without overlap.</p> <p>Lastly, the ESA Program staff worked with the general energy efficiency multi-family programs to develop an integrated strategy targeted to property managers and owners for the 2015-2017 program cycle.</p>
2.2: Coordinate and communicate between Energy Savings Assistance Program, energy efficiency and DSM programs to achieve service offerings that are seamless for the customer.	<ul style="list-style-type: none"> Continually reevaluate and update programs to take advantage of new technologies. Explore in-home displays; home area networks and/or “pay-as-you-go” technology to assist low income customers manage their use. 	<ul style="list-style-type: none"> ESA Program participants are made aware of energy efficiency and other programs through an in-home education session during the initial visit, in addition to receiving an informational booklet “Extra help when you need it,” which provides conservation information and identifies other resources for saving energy. SDG&E continues to work with Grid Alternatives to serve qualifying low-income customers with the ESA Program

Implementation Plan and Timeline		
Strategies	Term 2012 - 2014	IOU strategy employed this program year
		<p>who would also be participating in the Single-Family Affordable Solar Homes program (SASH). In 2014, Grid Alternatives provided SDG&E with 170 referrals, resulting in two ESA Program enrollments. In addition, a third ESA Program enrollment resulted from a referral generated in 2013. The SASH Program originated with California Assembly Bill 2723, which directed that a minimum of 10% of California Solar Initiative (CSI) funds be set aside for programs assisting low-income households in accessing solar technology.</p>
<p>2.3: Provide low income customers with measures that result in the most savings in the Energy Savings Assistance Program.</p>	<ul style="list-style-type: none"> Assess opportunities to incorporate new energy efficiency measures into the ESA program, e.g., plug-load reduction, new HVAC technology. 	<ul style="list-style-type: none"> The ESA Program measures did not change in 2014. SDG&E continued to provide customers with major appliances such as refrigerators, high-efficiency (HE) clothes washers, and microwaves in order to drive larger savings for customers. The ESA Program also identified several new measures or enhanced program measures which were proposed in SDG&E's 2015-2017 Low Income Application filed on November 18, 2014. The proposal resulting from that initiative included screw in LED lamps, heat pump water heaters, tub diverters, Tier 2 smart power strips, efficient fan controllers, combined showerheads/thermostatic shower valves and prescriptive duct sealing.

Implementation Plan and Timeline		
Strategies	Term 2012 - 2014	IOU strategy employed this program year
2.4: Increase delivery of efficiency programs by identifying segmented concentrations of customers.	<ul style="list-style-type: none"> Evaluate approach determine whether additional segments are needed. 	<ul style="list-style-type: none"> SDG&E used residential segmentation data overlaid with Athens Research data to identify customers who live in areas with historically low penetration but who also have mid-high eligibility propensity. SDG&E continued to expand and build upon its relationships with Community Based Organizations (CBOs) to help connect with customers who have limited English proficiency or other cultural and ethnic barriers. This network is comprised of more than 200 grassroots, nonprofit and neighborhood centric organizations. These partners help educate and engage customers through a variety of tactics including presentations, events, workshops, and messaging.

1.2. Energy Savings Assistance Program Overview

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

Program Summary			
	Authorized / Planning Assumptions	Actual	%
Budget	\$26,904,989	\$19,143,282	71%
Homes Treated	20,316	22,039	108%
kWh Saved	8,416,623	7,103,514	84%
kW Demand Reduced	2,017	692	34%
Therms Saved	283,727	352,100	124%
GHG Emissions Reduced (Tons)	6,290	5,967	95%

1.3. Marketing, Education, and Outreach

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

SDG&E improved targeting efforts by leveraging previously available data from Athens Research alongside newly available customer account data from its Residential Segmentation Study. Using this information, SDG&E was able to identify distinct segments among residential customers based on various factors such as: demographics and home characteristics, household electricity consumption, contact history, and program participation. This segmentation allowed for targeted messaging to customers with high potential for eligibility. Likewise the utilization of customers’ preferred channels of communication enabled SDG&E to drive customer enrollment. A series of communication tactics such as direct mail, outbound calling, and door-to-door canvassing were deployed to potentially eligible customers within specific neighborhoods. In addition, SDG&E’s Branch Office locations continue to provide customers with the ability to apply for the ESA Program.

SDG&E coordinated these tactics in a multi-touch integrated approach to increase awareness and recall, and to drive enrollments in the ESA Program. As part of its customer engagement outreach plan, SDG&E also built on earlier success with its community partners by educating and providing materials on the ESA Program which included utilizing the new online process to facilitate program enrollments for customers. The ability of these neighborhood-based community partners to penetrate hard-to-reach customer segments also helped SDG&E enroll customers in areas with significant language, ethnic or cultural barriers. In addition, the continued expansion of the Energy

Solutions Partner Network⁴ allowed leveraging of both traditional messaging (e-mail, newsletters, direct mail) and social media (Facebook, Twitter, Pinterest) platforms to effectively deliver tailored messages to customers from organizations they are aligned with and trust. SDG&E also worked with partners to provide education and engagement opportunities at more than 1,250 presentations and events in Southern Orange County and San Diego County. At the events with multicultural/multilingual partners or communities, SDG&E secured bilingual representatives in order to communicate effectively with non-English speaking customers who often represent SDG&E's hardest-to-reach populations.

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

SDG&E improved how it identifies and targets historically hard-to-capture customer segments. Whereas prior residential segmentation was based primarily on Nielson Prizm Data, in 2014, SDG&E began to utilize its Residential Segmentation Study overlaid with the Athens Research Study. Using this data, SDG&E was able to identify distinct segments among residential customers based on various factors such as:

- Demographics and home characteristics;
- Household electricity consumption, contact history, program participation;
- Household-level PRIZM segments;

⁴ SDG&E's Energy Solutions Partner Networks consists of over 200 local, grassroots and community-based organizations.

- Perceived ability and willingness to take action to change energy consumption patterns and behaviors;
- Motivations for adopting new behaviors, including underlying values that drive decisions;
- Attitudes toward energy efficiency and environmental issues; and
- Affinity for new technologies and energy management tools.

To connect with the target audiences, SDG&E took an approach that featured actual customers participating in the ESA Program, allowing them to tell their story through multiple mediums. Email, print, television and online campaigns showcased a family that participated in both the CARE and ESA Programs and carried a comforting and spendthrift message.

SDG&E also utilized the target segmentation for the whole neighborhood approach by direct marketing through door-to-door and email efforts employed throughout 2014.

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

SDG&E made no changes to the ESA Program delivery strategy in 2014.

1.4. Energy Savings Assistance Program Customer Enrollment

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

Through its HEAT database, SDG&E has maintained records on ESA Program since 1996. SDG&E does not actively market to past participants because the goal of the ESA Program is to serve as many new customers as possible during the program cycle.

If a customer contacts the ESA Program and the dwelling has (1) not been served by the program since 2002 or (2) has a qualifying “go back” measure (refrigerator, attic insulation, furnace), SDG&E will re-qualify and serve that customer. This approach allows old customers to receive services they are eligible for while keeping the program focused on new customers who have never received services. In 2014, 62 customers (or 0.3%) were served as “go backs”.

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

SDG&E worked with its outreach and assessment contractors to coordinate the prompt receipt of leads collected from SDG&E’s outreach tactics and to expedite customer contact. SDG&E also provided zip codes containing the number of estimated eligible customers in order to support the Commission’s directive to continue categorical enrollment and self-certification for the ESA Program in targeted areas.⁵

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

SDG&E treated 22,039 homes, achieving 108% of its annual goal in 2014.

1.5. Disability Enrollment Efforts

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

The ESA Program disability enrollment penetration for 2014 measured 11%.

⁵ D. 12-08-044, Ordering Paragraph 2.

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

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

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

In addition, materials are developed on an as needed basis to help educate visually and hearing impaired customers. For instance, in 2014, SDG&E worked in partnership with Deaf Community Services of San Diego (DCS) to update messaging and materials originally customized by the organization. DCS educates and provides direct services to the hearing-impaired and deaf in the San Diego Region. DCS has been an integral part of SDG&E's Energy Solutions Partner Network since its inception over five years ago. As a partner, DCS created its own video to promote SDG&E's energy-saving solutions. DCS uses this video as a key part of its effort to inform the community it serves. DCS promotes both the CARE and ESA Program offerings as companion programs and assists their constituents in the enrollment process. Below is a link to the video, which is also posted on the DCS website and social media page.

<http://www.deafcommunityservices.org/sdge-resources/>

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

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

SDG&E has provided several aids for customers with visual impairments:

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

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

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

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

- AARP
- Abled-Disabled Advocacy, Inc.
- Access to Independence
- ARC – San Diego
- Braille Institute
- Burn Institute
- Challenged Athletes Foundation
- Deaf Community Services
- Developmental Disability Provider Network (DDPN)
- Disability Help Center
- Disabled Veterans of San Diego
- ElderHelp San Diego
- Meals on Wheels

- Mental Health Association
- National Alliance on Mental Illness
- San Diego Center for the Blind
- San Diego County – Aging & Independent Services
- San Diego Parks & Recreation – Disabled Services Advisory Council
- Southern Caregiver Resource Center
- Rehabilitation & Assisted Living Care Facilities
- Senior Centers

These partners provide customized messaging through email, e-blasts, newsletters, social media posts like Facebook and Twitter, as well as at events, workshops and/or training with the organization's staff.

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

In 2014, SDG&E's ESA Program achieved an 11% participation rate from the disabled community.

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

During the enrollment process, the outreach and assessment contractors obtain this information if the customer opts to provide it. The information is captured on the ESA Program assessment form.

As part of marketing, education and outreach efforts, SDG&E continues to work through its network of partners who actively engage with the special needs community. Additionally, SDG&E has Customer Solutions Outreach Advisors who are assigned to work with community-based organizations like these as direct liaisons to SDG&E

programs and services. SDG&E provides ESA Program information in large font and Braille versions to customers with visual impairments, and provides videos in ASL for customers with hearing impairments through its partnership with DCS. ASL interpreters also work alongside the Customer Solutions Outreach team to assist customers at select outreach events.

1.6. Leveraging Success, Including LIHEAP

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

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

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

SDG&E’s primary outreach and assessment contractor, Richard Heath and Associates, entered into a Memorandum of Understanding with the California

Department of Community Services and Development (CSD) agencies, Metropolitan Area Advisory Committee (MAAC) and Campesinos Unidos, Inc. (CUI) to enroll eligible Low Income Home Energy Assistance Program's (LIHEAP) bill assistance customers in the ESA Program. On site presence at MAAC bill assistance workshops yielded 78 new leads and 17 new enrollments for the ESA Program. CUI efforts, meanwhile, resulted in 1,373 new leads and 759 new enrollments.

In addition, SDG&E's ESA Program collateral materials include program information advising customers that they may also be eligible for the programs offered by CSD. Customers whose homes are not eligible for the ESA Program due to inability to meet program requirements are referred to CSD for possible participation in their Weatherization Assistance Program.

Lastly, SDG&E continues to work closely with Grid Alternatives to efficiently identify and serve any ESA Program eligible customers with all feasible measures. As a result, SASH participants can move forward with their solar installation at an accelerated pace.

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

Other benefits resulting from the CSD partnership include the ability to provide customers with better overall service by simplifying and streamlining the enrollment processes for the programs involved. Customers do not have to contact individual programs separately, thereby improving the level of service offered to customers. This results in customers receiving all feasible measures from both the CSD and SDG&E programs.

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

In 2014, SDG&E continued to work with CSD on the Solar Water Heating Pilot, described below.

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

1. Low-income families are unable or unwilling to pay the difference between the average cost of solar water heating, leaving a \$5,000 - \$6,000 funding gap;
2. The design of the CPUC decision makes it difficult to identify qualifying customers because, in part, it requires ESA Program participation data from the IOUs that trigger customer consent issues;
3. SDG&E supported the Solar Water Heating effort by sending customers' information of CSD's solar water heating program, inviting previous ESA Program participants living in targeted employment areas to contact CSD for solar water heating rebates. SDG&E began sending letters in September 2013. This continued into 2014 and, in total, SDG&E mailed 6,185 letters to potentially qualified customers. The pilot ended in 2014 and the results will be evaluated in 2015.

1.7. Integration Success

According to Decision 08-11-031, "Integration constitutes an organization's internal efforts among its various departments and programs to identify, develop, and enact

cooperative relationships that increase the effectiveness of customer demand side management programs and resources. Integration should result in more economic efficiency and energy savings than would have occurred in the absence of integration efforts.”

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

Slight differences between income documentation requirements came to light upon the launch of the joint ESA and CARE online customer enrollment process during the 3rd quarter of 2013. In 2014, the CARE and ESA Program teams worked to align customer income documentation requirements used to support program eligibility. The ultimate goal is to establish a central repository for income documents that can be utilized by either program. This work will continue into 2015.

In addition, with the implementation of the CARE High Usage Verification the CARE and ESA Program teams worked together closely to ensure customer hand-offs between the two programs were efficient and timely since this was handled through a manual process. Automation is scheduled to occur in mid-2015.

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

In 2014, the ESA Program staff worked with the general energy efficiency multi-family programs’ staff to develop an integrated strategy targeted to property managers and owners for the 2015-2017 program cycle. This strategy includes:

- Hiring an internal resource to act as the single point of contact for property managers and owners;
- Implementing a layered program approach for property owners/managers through the single point of contact to reduce confusion;

- Consolidate and redesign program processes to reduce duplication and complexity; and,
- Educate property owners/managers and renters on how to get the most energy savings from the program investment.

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

The ESA Program has continued to work with the City of Chula Vista to integrate the ESA Program literature into Chula Vista's residential outreach program. This has included erecting new displays at Parent Resource Centers within local schools participating in the South Bay Community Services Chula Vista Promise neighborhood. It has also included helping Chula Vista conforming their referral process with the ESA Program requirements so that the City can provide residential referrals from home visits or from events directly to the ESA Program, ensuring that interested residents participate in the program.

In addition, a presentation was given to the La Mesa Environmental Sustainability Commission regarding SDG&E programs, including the ESA Program and other customer assistance program offerings.

Lastly, SDG&E has worked with Habitat for Humanity on a neighborhood revitalization project located in the City of Encinitas. Representatives from the Habitat for Humanity, the ESA Program, and the Residential Direct Install Program canvassed a neighborhood of approximately 40 homes in an effort to sign customers up for the appropriate program. As a result of this effort, three homes received ESA Program services.

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

SDG&E's centralized marketing and outreach teams continued to look for opportunities to integrate the Energy Efficiency Programs with the CARE and ESA Programs in 2014. In addition, program staff continued to work together to refine and look for opportunities to integrate program delivery.

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

In the 4th quarter of 2014, SDG&E's Demand Response programs staff began working with the ESA program staff to identify opportunities where the ESA Program could be offered by their program contractors in an effort to provide more leads to the ESA Program outreach and assessment contractors. Further discussions will occur in 2015.

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

SDG&E has continued to work closely with Grid Alternatives to efficiently identify and serve any ESA Program eligible customers with all feasible measures to ensure that solar installations for single family homes can be accomplished as quickly as possible. The ESA Program participants may also be enrolled in the SASH program, which offers low income homeowners incentives on Photovoltaic (PV) solar systems. In 2014, Grid Alternatives provided SDG&E with 170 referrals, resulting in two ESA Program enrollments. In addition, a third ESA Program enrollment resulted from a referral generated in 2013.

1.8. Workforce Education & Training

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

In 2014, SDG&E continued to reach out to ESA Program contractors to attend the educational and training classes offered at SDG&E's Energy Innovation Center (EIC). Classes at the EIC provide up-to-date training on subjects relevant to ESA Program contractors. Workshops are industry specific and include home performance, demand response, sustainability, heating ventilation and cooling, and codes and standards. Attendees also have an opportunity to network and collaborate. In 2014, at least one employee from each ESA program contractor attended training at the EIC. In addition, a total of 49 employees of ESA Program contractors attended trainings - an increase of 26% from 2013. SDG&E also trained over 20 employees of ESA Program contractors on Lead Hazard Awareness.

In December of 2014, SDG&E entered into a service agreement with La Cooperativa to develop training for its ESA Program assessors. La Cooperativa will review other IOUs current training to determine best practices. The training will be offered at the Center for Employment Training (CET) facilities in San Diego. CET will also serve as a feeder network to provide potential candidates for training.

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

SDG&E's outreach contractor, The Harris Group (THG), continued to hire local residents to provide multicultural and multilingual outreach support for the CARE and ESA Programs.

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

1.9. Legislative Lighting Requirements Status

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

SDG&E contractors have not reported problems in procuring CFLs for the ESA Program.

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

SDG&E has incorporated the information on proper disposal and recycling into its Energy Education guide; this guide is reviewed with the customer during the enrollment process.

1.9.3. Complete Table 15 (in Appendix). In addition, please briefly summarize the CFL procurement process for the IOU, including manufacturers, distributors, warehousing, and contractor delivery.

SDG&E does not procure CFLs for the ESA Program. ESA Program contractors are responsible for purchasing CFLs and providing warehousing to store the products.

1.10. Studies

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

Four statewide studies were authorized for the 2012-2014 ESA Program cycle.⁶

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

Consultants for each study were selected through competitive bid processes conducted during the last quarter of 2012. Contracts were awarded and each study began in the first quarter of 2013.

All studies were completed in 2013, in time to be used to inform the 2015-2017 ESA Program Applications. The delay in the issuance of D.12-08-044, combined with the logistics and technical requirements required to execute each of the studies according to the objectives outlined in the Decision, posed some challenges for the studies given the budgets allocated to them and their extremely aggressive schedules.

In 2014, there were no active ESA Program studies. In D.14-08-030, the Commission adopted the four studies to be conducted during the 2015-2017 program cycle.⁷

Table 1.10.2 below provides an overview of the 2012-2014 studies. A more expansive description of each study is provided further below.

⁶ D. 12-08-044, adopted in August 2012.

⁷ Ordering Paragraph 34 of D.14-08-030.

TABLE 1.10.2: 2012-2014 ESA PROGRAM STUDIES

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

Joint Utility⁸ Low Income Multifamily (MF) Segment Study

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

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

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

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

⁸ The Joint Utilities are Pacific Gas & Electric (PG&E), Southern California Edison (SCE), Southern California Gas Company (SCG), and San Diego Gas and Electric Company (SDG&E).

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

The study performed a literature review of low income MF programs in order to better understand program design options being successfully implemented in other jurisdictions. Other data sources included a review of financing opportunities, and an analysis of census and demographic data. In addition, interviews were conducted with IOU program managers and multifamily stakeholders, and a phone survey was conducted with property owners and operators.

The study findings included the following. Statewide, 30% of all California residential households qualify for the ESA Program; low income multifamily households represent approximately 9% of total California residential households. Seven percent of these low income multifamily households live in market-rate buildings, 2% in affordable housing, and less than 1% own their unit. Changing the focus to all low income households, the study found that 32% of low income households reside in multifamily buildings with five or more units. The percentage of low income multifamily households, meanwhile, varies across the four IOUs, ranging from 39% to 27%. Furthermore, when viewed across the spectrum of all California multifamily households, 42% qualify as low income.

This study used a “whole building approach” to focus on the needs and issues of multifamily property owners and operators in their role as the ultimate decision-makers

responsible for program participation. This focus was a response to the Decision directive to explore a whole building approach.

One drawback to the study was the difficulty in getting property owners to participate in the survey. This was especially true with market rate multifamily building owners. These building owners, representing the majority of multifamily properties, were much harder to reach than owners and operators of affordable housing properties, who have bigger incentives to participate in energy efficiency upgrade programs due to federal requirements and tax incentives. This may be indicative of the challenges in designing a program to reach low income tenants of all multifamily dwellings.

A public workshop to discuss the Research Plan was held on March 5, 2013 in San Francisco. Two additional workshops were held to solicit public comments on the preliminary results (September 25, 2013) and the draft report (November 13, 2013). The Final Report was issued and posted on December 4, 2013.

In D.14-08-030, the Commission adopted key recommendations of the Multifamily Segment Study and directed the IOUs to use Study findings and recommendations to prepare the 2015-2017 Low Income Application.

In 2014, SDG&E utilized the Multifamily Segment Study as directed in preparing its Low Income Application⁹ which was filed on November 18, 2014.¹⁰

Joint Utility ESA Energy Education Study

The prime research contractor for the Energy Education Study was Hiner and Partners with KEMA as a subcontractor. SCE was the contract manager.

⁹ Application (A.) 14-11-009.

¹⁰ D. 14-08-030, Ordering Paragraph 36.

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

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

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

Regarding educational content, the study found that while the materials were relatively comprehensive, some suggestions for modifications and improvements were

offered. Most notably, the study found that customers reported seeking more information on specific and practical appliance cost of use information.

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

In D.14-08-030, the Commission adopted the Energy Education Study – Phase I Report and directed the IOUs to use Study findings and recommendations to prepare the 2015-2017 Low Income Application.

In 2014, SDG&E utilized the Energy Education Study – Phase I Report as directed in preparing its Low Income Application which was filed on November 18, 2014.¹¹

Joint Utility Low Income Needs Assessment Study

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

The previous LINA Study was completed over five years ago and was based on data collected nearly 10 years ago.

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

¹¹ D. 14-08-030, Ordering Paragraph 36.

accessibility of the programs along with willingness and barriers to participate; evaluate energy burden and insecurity; and identify energy-related needs and non-energy benefits.

The study's key findings included the following:

- Roughly 32% of California IOU households are eligible for CARE and ESA Programs. Of these, 95% were enrolled in CARE as of the end of 2012¹², and 59% of eligible households have been treated by the ESA Program.
- Both the CARE and ESA Programs have been effectively reaching households in areas with key markets in need. The programs have been less successful reaching areas with more renters, extreme poverty, and higher energy usage.
- Key barriers to ESA Program participation include lack of customer trust of contractors; difficulty getting the landlord's approval for renting customers; customers having to be home for appointments; and homes needing measures the program offers. The requirement to provide income documents was not found to be a barrier.
- Roughly 52% of non-participants are willing to participate in ESA Program. This is significantly less than the estimate reported by the previous Needs Assessment (95%).
- The mean energy burden is estimated at 8%.¹³ This is statistically unchanged from 2005 data collected for the prior Needs Assessment study.
- Single-family renters have greater energy-related needs and barriers to participation than single-family homeowners and multi-family dwellers.
- The average CARE customer saves \$29 per month (33% savings) on their electric bill and \$6 per month (18% savings) on their gas bill.

¹² Note that as the IOUs increase post-enrollment verification, the penetration rate is going down as more households are removed from the program.

¹³ Based on taking the mean of customer-level ratios of energy burden.

- 81% of ESA Program participants reported noticing a reduction in their energy bills and between 44 to 64% reported noticing improvements in health, comfort and safety.
- Customers reported that HVAC and weatherization measures are more likely to generate savings and improvements in health, comfort and safety. The next most beneficial measure reported was a refrigerator.

The final study results were presented at a public workshop on December 3, 2013.

The final report was issued in three volumes and posted on December 16, 2013.

In D.14-08-030, the Commission adopted the Low Income Needs Assessment Study and directed the IOUs to use Study findings and recommendations to prepare the 2015-2017 Low Income Applications.

In 2014, SDG&E utilized the Low Income Needs Assessment Study as directed in preparing its Low Income Application which was filed on November 18, 2014.¹⁴

Joint Utility 2011 ESA Program Impact Evaluation

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

The primary objective of this evaluation was to estimate first-year electric and gas savings and coincident peak demand reduction attributable to the 2011 ESA Program.

The results were used to quantify the 2011 program achievements, document the relative value of various measures in producing energy savings, produce savings forecasts, and

¹⁴ D. 14-08-030, Ordering Paragraph 36.

meet filing and reporting requirements (including informing the development of the 2015-2017 ESA Program application).

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

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

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

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

In D.14-08-030, the Commission adopted the Impact Evaluation Report and directed the IOUs to use Report findings and recommendations to prepare the 2015-2017 Low Income Application.

In 2014, SDG&E utilized the Impact Evaluation Report as directed in preparing its Low Income Application which was filed on November 18, 2014.¹⁵

1.10.2. If applicable, submit Final Study Report describing: (1) overview of study; (2) budget spent vs. authorized budget; (3) final results of study; and (4) recommendations.

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

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

Study	Lead Consultant	Managing Utility	Budget Authorized ¹⁶	Budget Expensed	%
Multifamily Segment Study	The Cadmus Group, Inc.	PG&E	\$400,000	\$399,340	100%
ESA Program Energy Education Study	Hiner & Partners, Inc.	SCE	\$300,000	\$243,428	81%
Low Income Needs Assessment Study	Evergreen Economics	SCE	\$700,000	\$699,997	100%
ESA PY2011 Impact Evaluation	Evergreen Economics	SDG&E	\$600,000	\$489,364	82%

¹⁵ D. 14-08-030, Ordering Paragraph 36.

¹⁶ This amount represents the total authorized Joint Utility study budget. The authorized Joint Utility budget split is: PG&E--30%, SCE--30%, SCG--25%, and SDG&E--15%.

1.11. Pilots

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

There were no pilot programs conducted in 2014.

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

There were no pilot programs conducted in 2014.

1.12. “Add Back” Measures

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

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

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

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

The inclusion of “add backs” in the current program will not impact the utilities’ ability to meet the 2020 plan goal that 100% of eligible and willing customers will have received all cost effective ESA Program measures because the number of “add backs” in relation to the overall budget is small. Through effective program management, SDG&E is able to control program costs and deliver all feasible measures to customers. The actual figures in the four “add-back” measure categories outlined above are provided in Table 16. During 2014, SDG&E did not experience a shortfall in other parts of its ESA Program resulting from the installation of “add-back” measures. Therefore, SDG&E plans to continue to install “add-back” measures when feasible.

1.13. Low Income Working Groups

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

In 2014, there were no active Working Groups. In D.14-08-030, the Commission adopted the Reports submitted by the three Working Groups.¹⁷

¹⁷ Ordering Paragraph 37 of D.14-08-030.

ESA Program Cost Effectiveness Working Group – During the 2012-2014 program cycle, SDG&E participated in the ESA Program Cost Effectiveness (CE) Working Group.

The CE Working Group submitted a White Paper to the Commission with cost effectiveness recommendations on February 14, 2013. Following further research, the CE Working Group submitted an Addendum on July 15, 2013. In D.14-08-030, the Commission adopted two reports from the CE Working Group recommendations as follows: (1) the Commission shall base program approval for the 2015-2017 cycle and beyond on the cost-effectiveness results at the program level, rather than at the measure level; (2) in the 2015-2017 applications, the IOUs shall categorize measures as “resource” or “non-resource” based on the measure’s ability to provide energy savings; (3) the IOUs shall apply the two proposed new cost-effectiveness tests, the Energy Savings Assistance Cost-Effectiveness Test (ESACET) and the Total Resource Cost (TRC) test, replacing the existing tests; and (4) during the 2015-2017 cycle, for informational purposes, the IOUs shall conduct a preliminary, qualitative Equity Evaluation, with opportunity for party comment on the preliminary results.

D.14-08-030 did not adopt a cost-effectiveness threshold. It directed the Energy Division, however, to reconvene the CE Working Group in order to develop a program-level cost-effectiveness threshold as expeditiously as possible. D.14-08-030 also contended that in the absence of a consensus-based threshold by the time the 2015-2017 Low Income Applications are filed, the IOUs should not delay the filings. In accordance with Commission directives, SDG&E filed its 2015-2017 Low Income Application on

November 18, 2014 and it did not reflect a program-level cost-effectiveness threshold because there was no recommendation from the CE Working Group.

ESA Program Workforce, Education, and Training Working Group – D.12-08-044 directed the establishment of the ESA Program Workforce, Education, and Training (WET) Working Group. The Working Group evaluated workforce data gathered by the IOUs from their ESA Program contractors. The Working Group developed and recommended a list of researchable questions related to collecting and tracking demographic data which was submitted to the Commission on July 17, 2013.

D.14-08-030 adopted the WET Working Group's recommendation of researchable questions and contends that it should be addressed by a consultant to form the future direction of workforce data collection and to determine the workforce needs and successes within the ESA Program.

Mid-Cycle Working Group - On July 15, 2013, the Mid-Cycle Working Group submitted its Final Report to the Commission on the following: (a) Proposed revisions to the Statewide ESA Program Policy and Procedures Manual (P&P Manual); (b) Proposed revisions to the Statewide Installation Standards Manual (IS Manual); (c) Streamlining of the Utilities' Reporting Requirements; (d) the Utilities' Best Practices; (e) General Mid-cycle Program and Process Improvements; and (f) Potential 2015-2017 Application and Cycle Issues, including whether the next cycle applications could benefit from bifurcation of CARE Program issues from ESA Program issues.

In general, D.14-08-030 agreed that the recommendations from the Mid-Cycle Working Group were reasonable and therefore adopted. D.14-08-030 approved the proposed revisions to the P&P Manual, with some modifications. In addition, the

decision clarified that the IS Manual does not require review or approval by the Commission. However, the Commission did acknowledge the efforts put forth by the Mid-Cycle Working Group and opined that the revised IS Manual should be rolled out immediately.¹⁸

1.14. Annual Public ESA Program and CARE Meeting

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

In compliance with D.12-08-044, on February 11, 2014, SDG&E held a public workshop on its 2015-2017 Low Income Program Application for its CARE and ESA Program to solicit program ideas for program design, outreach, and marketing efforts. SDG&E provided a brief overview of its current program plans and challenges. Some of the new measures proposed in SDG&E's Low Income Application came from ideas provided by the meeting participants.

In addition, on June 3, 2014, the IOUs held a joint public meeting to present an overview of their 2013 ESA Program and CARE Program results. The meeting was hosted by PG&E at its San Ramon Training Center.

¹⁸ See Section 6.1.2.3. of D.14-08-030.

CALIFORNIA ALTERNATE RATES FOR ENERGY ANNUAL REPORT

2. CARE EXECUTIVE SUMMARY

The California Alternate Rates for Energy (CARE) program, formerly known as the Low Income Ratepayer Assistance Program (or LIRA) was established through a legislative mandate¹⁹ and was implemented by the California Public Utilities Commission (Commission) in Decision (D.) 89-07-062 and D. 89-09-044. The Commission expanded the program to qualified non-profit group living facilities such as women's shelters and homeless shelters in 1992 in response to additional legislation.²⁰ The program was further expanded to qualified agricultural employee housing facilities in D. 95.10-047. In 2005, D. 05-04-052 expanded the program to include authorized agricultural housing facilities managed by the Office of Migrant Services and other non-profit migrant farm worker housing centers.

Since 2005, income eligibility for CARE was set by the Commission at 200% of the Federal Poverty Guidelines²¹. In 2006, the Commission authorized utilities to implement: 1) Categorical Eligibility which allowed customers to qualify for CARE based on their participation in certain state or federal assistance programs; 2) four-year recertification for low income customers on a fixed income; 3) a process to enroll certain prospective CARE-qualified households by telephone; 4) a process to all customers to

¹⁹ Senate Bill (SB) 987 (enacted in June 1988) which directed the Commission to establish a program of assistance to low income customers to mitigate the impact caused by the narrowing of the baseline/non-baseline differential and that the cost of the assistance program was not to be borne solely by any single class of customer.

²⁰ SB 693 extended CARE benefits to qualifying group living facilities; SB 491 changed the program's name and modified CARE to include women's shelters, hospices, and homeless shelters, and AB 3429 expanded the CARE program to include migrant farmworker housing, employee housing, and agricultural employee housing.

²¹ D. 05-10-044.

recertify their CARE eligibility through SDG&E's Interactive Voice Recognition system (IVR); and, 5) internet-based CARE enrollment and recertification.

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

In 2010, the legislature enacted Senate Bill 695 which changed section 731.9 of the Public Utilities Code to state that eligibility for the CARE program should be no greater than 200% of the Federal Poverty Guidelines.

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

In January 2014, the California Legislature enacted Assembly Bill (AB) 327. The bill had several impacts to the CARE program. Most notably, the bill required the utilities to restructure the CARE rates and to set an effective electric rate discount between 30-35%. The Commission is currently addressing proposals submitted by SDG&E in Rulemaking (R.)12-06-013.²²

In D. 14-08-030, the Commission addressed Phase II issues outlined in D.12-08-044. It authorized 12-month bridge funding for PY 2015; made minor corrections and clarifications to D.12-08-044; adopted key recommendations from the 2013 Low-Income Needs Assessment for CARE; and continued further review on issues regarding the definition of income and on other issues related to the qualifying list of Categorical Eligibility programs. This report provides the accomplishments and expenditures for SDG&E's CARE program PY 2014. At year-end 2014, the CARE Program had enrolled over 59,000 customers with an overall penetration rate of 78.7%.

2.1. Participant Information

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

TABLE 1					
Residential CARE Program Electric Customers by Month			Residential CARE Program Gas Customers by Month		
PY2014	CARE Customers	Percentage Change	PY2014	CARE Customers	Percentage Change
Jan	297,330	-1.08%	Jan	199,438	-1.12%
Feb	295,249	-0.70%	Feb	197,964	-0.74%

²² Direct Testimony of Cynthia Fang submitted on February 28, 2014 addresses SDG&E's proposal for complying with AB 327 effective rate discount.

Mar	292,119	-1.07%		Mar	196,135	-0.93%
Apr	292,115	0.00%		Apr	196,032	-0.05%
May	292,433	0.11%		May	196,088	0.03%
Jun	289,986	-0.84%		Jun	194,608	-0.76%
Jul	288,062	-0.67%		Jul	193,096	-0.78%
Aug	289,459	0.48%		Aug	192,943	-0.08%
Sep	288,371	-0.38%		Sep	190,730	-1.16%
Oct	286,049	-.81%		Oct	187,117	-1.93%
Nov	286,582	0.19%		Nov	185,397	-0.93%
Dec	278,931	-2.74%		Dec	178,359	-3.95%

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

SDG&E and the other California large Investor-Owned Utilities (IOUs)²³ used the joint utility methodology adopted by the Commission in D.01-03-028 for developing monthly penetration estimates in 2014. This method entails annual estimation of eligibility for CARE, the ESA Program, and other income-by-household size parameters at the small area (block group, census tract, ZIP+2, etc.) for each IOU service territory and for the state as a whole.

The most recent important change affecting the eligibility estimates was the passage of AB 327, which combined the income limits for one- and two-person households, effective January 1, 2014. The requirements for 2014 eligibility, corresponding to the current estimation, again used the January Health and Human Services (HHS) Poverty Guidelines [Federal Register /Vol. 79, No. 14 /Wednesday, January 22, 2014 /Notices; p.3593], but returned to “bundling” one- and two-person

²³ The large IOUs are comprised of: Southern California Edison Company (SCE), Southern California Gas Company (SoCalGas), Pacific Gas and Electric Company (PG&E) and San Diego Gas & Electric Company (SDG&E).

households at the HHS-defined 200% FPG limit. This difference in treatment of one-person households restores approximately two percent to the eligibility that would have been estimated if the separate HHS limits approach had been retained.

Sources for the estimation include the current HHS guidelines, current year small area vendor marginal distributions on household characteristics, Census American Community Survey Public Use Microdata Sample (PUMS) 2009-2013 survey data, utility meter and master meter household counts, Department of Finance Consumer Price Index series, and various Geographic Information System sources. An important change has been implemented since 2011, which involves adjusting small area (block group) income distributions to match the latest American Community Survey distributions at the Public Use Microdata Area.

Estimates from the block group level are aggregated to county/utility and whole utility level, among other aggregations. Annually, SDG&E 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) to obtain an estimate of income/demographic eligibility in household count form. Monthly, SDG&E counts the number of households (by small area, by county, and overall) that are enrolled in CARE. The CARE household total, including individually metered and sub-metered occupied housing units, is divided by the total income/demographic eligibility.

A refinement in 2007 made use of Census Advance Query, PUMS, and SF3 tabulations to develop estimates specific to “payer types”: i.e., individually metered, sub-metered, and non-sub-metered master meters. In 2012, Athens developed an improved method for estimation of payer status-specific eligibility. This method took

into consideration American Community Survey Microdata relationships between guideline statuses (above/below 200 percent FPG), tenure, and fuel payment relationships. These cross-classifications are fitted to small area (block group) marginal to produce payer-type specific distributions, which can be aggregated to various other geographic levels.

In 2009, the method was augmented to better incorporate the impact of labor force changes, including unemployment and other forms of job separation, as well as positive changes that are expected to occur in California subsequent to the recession. The method adjusted block group marginal distributions on household income based on sub-state modeling that incorporated Current Population Survey, Integrated Public Use Microdata Survey data, American Community Survey Data, and California Employment Development Department county and Metropolitan Statistical Area level labor force series. This adjustment to the block group income marginal is then incorporated into the otherwise “standard” estimation approach to produce small area estimates reflecting small area income changes due to labor market forces.

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

The joint utility methodology, as described above, was used throughout 2014.

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

CARE eligibility rates by small and large areas, as described in section 2.1.2, are developed so that they apply to individual residential meters and sub-metered dwelling units only. Non-sub-metered master meters and other meters that do not provide residential service are not included in the “technical eligibility” meter counts.

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

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

2.1.2.4. Describe how current CARE customers were counted.

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

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

The formula for calculating CARE-penetration rates is:

Number of CARE Customers

Number of Estimated CARE-Eligible Households

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

Electric – 30.65%

Gas – 29.12%

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

At the year-end of 2014, SDG&E had 39,308 electric and 29,549 gas sub-metered units in master-metered facilities. Utilizing the methodology described above, the estimated eligibility rates for residential sub-metered tenants for 2014 was 59.6% for electric and 54.4% for gas. Based on these rates, 23,440 electric and 16,094 gas sub-metered tenants were estimated to be eligible for CARE Program.

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

Electric – 15,233

Gas – 13,357

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

Electric – 64.99%

Gas – 82.99%

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

SDG&E did not encounter any problems administering the CARE program for sub-metered tenants and/or master-meter customers during the 2014 reporting period.

2.2. CARE Program Summary

2.2.1. Please provide CARE program summary costs.

CARE Budget Categories	Authorized Budget	Actual Expenses	% of Budget Spent
Outreach	\$2,300,352	\$2,434,024	106%
Proc., Certification and Verification	\$643,206	\$391,380	61%
Post Enrollment Verification	\$403,200	\$201,812	50%
Information Tech./Programming	\$1,230,082	\$634,476	52%
Pilots	\$108,000	\$117,000	108%
Measurement and Evaluation	\$42,500	\$0	0%
Regulatory Compliance	\$165,362	\$177,960	108%
General Administration	\$518,406	\$518,406	102%
CPUC Energy Division Staff	\$56,712	\$16,396	29%
Cooling Centers	\$35,985	\$29,215	81%
Total Expenses	\$5,503,805	\$4,530,706	82%
Subsidies and Benefits ²⁴	\$83,614,933	\$63,897,068	76%
Total Program Costs and Discounts	\$89,118,738	\$68,427,774	77%

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

CARE Penetration			
Participants Enrolled	Eligible Participants	Penetration rate	Target Met?
278,931	368,229	76%	No

²⁴ Represents the 20 percent line item discount applied to CARE customers' utility bills.

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

SDG&E did not identify any complaints regarding CARE recertification efforts in 2014.

2.3. CARE Program Costs

2.3.1. Discount Cost

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

Average Monthly Gas Discount: \$5.47

Average Monthly Electric Discount: \$15.55

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

Gas Subsidy - \$11,741,061

Electric Subsidy - \$52,156,007

2.3.2. Administrative Cost

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

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

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

Outreach: Costs in this category represent all the costs related to printing and mailing CARE applications and documents, as well as costs related to postage, bill inserts, brochures and flyers, advertising, targeted direct mail and telephone campaigns, community event sponsorships and support, distribution of collateral materials, outreach staff labor, and other outreach and enrollment efforts.

Capitation payments²⁵ and any agency-related outreach support efforts are also included in this category.

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

Post Enrollment Verification (PEV): Costs in this category include CARE PEV processing group labor and data entry costs. The function of the PEV group includes: 1) processing CARE income verification and CARE High Usage Verifications; 2) responding to customers' inquiries regarding CARE income verification; and 3) resolving customer issues related to income verification.

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

²⁵ Capitation payments are compensation fees paid to third-parties and community-based organizations that facilitate CARE enrollment for eligible hard-to-reach customers.

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

Cool Centers: Costs in this category include those associated with the development and printing of Cool Zone collateral pieces and staffing for the fan distribution to home-bound low-income seniors.

Measurement and Evaluation: Costs in the category for measurement and evaluation include contract and staff labor expenses for CARE participant eligibility updates.

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

General Administration: Costs in this category include office supplies; market research; and program management labor and expenses.

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

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

Electric CARE – \$6,746,349 under-collected

Gas CARE – \$1,212,605 over-collected

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

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

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

See CARE Table 10 in the Attachments.

2.4. Outreach

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

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 2014, mass media components included print, TV, radio and digital media.

Print Campaigns

In-language print ads were developed for both general and ethnic markets. Ethnic market campaigns targeted African American, Latino, 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 publications. Examples of the print ads can be found in Appendix 1.

Television

Fifteen and thirty second TV spots targeting general market and Latino audiences ran for a total of 12 weeks during the months of June, July, September, October, November, and early 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.

Radio

Fifteen second traffic IDs about the programs occurred on various radio stations. The IDs briefly described the benefits of the programs and encouraged customers to learn more on SDG&E's web pages for assistance programs.

Online Campaigns

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

Paid Search. By using hundreds of key words such as "bill discount," "food stamps," and "qualify for WIC" users were exposed to ads featuring information about the programs. More than 53,000 customers visited the Customer Assistance landing page on the SDG&E website as a result of using search terms. SDG&E's Customer Assistance landing page is a portal for customers looking for programs that can provide bill relief. Specifically, the portal has testimonial videos that feature actual customers who have

benefitted from the CARE and ESA Programs and provides links to the online dual CARE/ESA Program application as well as the Medical Baseline program application and fact sheet.

Display Ads. Display ads are geo-targeted online ads that appear next to content on web pages. The ads feature both customers and SDG&E employees. Display ads had a 22% click through rate (CTR), which is defined as the percentage of times an ad is clicked on out of the total number of ad views within a given time period.

Video Ads. Video ads are online commercials that run on online versions of TV networks in an effort to increase awareness and campaign impressions to targeted demographics. Video ads run on news networks such as UT San Diego, ESPNLA and ESPN Deportes and target both English and Spanish language audiences.

In summary, digital campaigns produced over 107,000 web visits for 2014.

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, with a total ethnic spending of \$224,338. Please see below for details.

Ethnic Online		
Audience	Impressions	Total Spent
Spanish	347,206	\$5,000.00

Ethnic Print		
Audience	Readership	Total Spent
Spanish	4,873,032	\$42,265.00
Chinese	1,496,000	\$15,404.00
Vietnamese	712,800	\$7,840.00
Filipino	1,800,000	\$16,290.00

African American	1,504,000	\$13,208.00

Ethnic Television		
Audience	Impressions	Total Spent
Spanish	7,647,752	\$117,300.00

Ethnic Radio		
Audience	Impressions	Total Spent
Spanish	301,200	\$7,031.00

Direct Marketing

Direct marketing allows SDG&E to connect with individual customers through targeted tactics. In 2014, SDG&E's direct marketing tactics included direct and electronic mail campaigns, automated voice messaging (AVM) campaigns, bill inserts, and door-to-door efforts.

Email Campaigns

Campaigns were leveraged with the ESA Program and contained an integrated messaging, directing customers to the online application process. Customer testimonials were the featured concept while subject lines and content were modified based on results. Unique open rates, defined as how many people opened the email, were as high as 33%, indicating the subject lines were compelling to customers. By comparison, industry standard open rates hover around 7%. 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 a sample of the email creative.

Direct Mail Campaigns

SDG&E reintroduced the use of direct mail campaigns in late 2014 as one direct touch tactic in its “multi-tactic” campaign. From July through December, targeted segments of customers were sent a direct mail postcard which included the customer’s account number. Customers were encouraged to use the account number to call SDG&E’s CARE Interactive Voice Response (IVR) number to enroll by phone. Approximately 2,900 customers enrolled through this direct mail postcard out of the 100,000 customers that were sent the mailer, representing a 3% enrollment. As a second prong of this campaign, a sub-set of ten thousand customers who did not respond to the original direct mail piece were contacted via outbound call resulting in an additional 3% enrollment. As the third prong of this campaign, a sub-set of 500 customers were contacted via door-to-door resulting in a little less than 1% enrollment in addition to the direct mail and outbound call enrollments.

Automated Voice Messaging (AVM) Campaigns

As discussed in SDG&E’s 2013 Annual Report, SDG&E decreased use of the AVM as a monthly tactic due to a sharp decline in customer response rates.²⁶ Instead, SDG&E used AVM to reach to the rural customer segment. Approximately 11,200 customers in SDG&E’s rural areas were contacted using AVM in 2014 resulting in approximately 225 enrollments, representing a 2% enrollment rate.

In addition, SDG&E used the AVM system to renew CARE customers, offering the option of recertification by phone. This additional renewal option occurred before the

²⁶ SDG&E’s Annual Report Activity on Low Income Programs, 2013 Results, at p.46.

customer's automatically scheduled renewal letter, thus reducing the number of renewals sent by mail. The success of the campaign was measured by the number of customers who chose to take part in this renewal option. Approximately 38,200 customers chose this option, representing a 16% response.

Bill Inserts

The mandated annual CARE bilingual notification took place in July. All non-CARE customers who receive paper bills received the bilingual application in their SDG&E bill, while paperless bill customers were provided a link to view their monthly bill inserts. In addition, bilingual bill inserts featuring the CARE and ESA Programs were distributed in March and November through the monthly bill. See Appendix 3 for a sample of the bill insert.

Door-to-Door

In order to target multilingual and harder to reach customers, SDG&E collaborated with The Harris Group, a third party, Diverse Business Enterprise (DBE) vendor, in order to identify, to strategize and implement door-to-door campaigns in high-to-mid density, potential CARE-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 2014, door-to-door efforts resulted in over 10,000 completed applications and contributed 7,082 customer enrollments to the program.

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 CARE-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, are often referred to as central intake agencies; these agencies provide a single point of contact for client information required by a number of local, state or federally-funded customer assistance programs. In 2014, SDG&E worked closely with 20 partner agencies in order to enroll customers in CARE and other low income programs. In 2014, CARE Partners contributed 6,642 program enrollments.

Energy Solutions Partner Network

SDG&E continues to work with an established network of more than 200 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 2014, nearly 1,200 activities were coordinated through this partner network to promote the CARE Program. Examples of Energy Solutions Partner messaging can be found in Appendix 4.

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 program enrollments, these tactics are important in educating and engaging organizations that serve these audiences. In 2014, SDG&E promoted CARE and other Customer Assistance solutions at over 1,250 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 2014, 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 Energy Service Specialist (ESS), customers are provided information about the CARE and ESA Programs in both English and Spanish. Customers are provided an option of requesting a CARE application through this process as well. In 2014, the Contact Center received over 20,000 requests for the CARE application.

In addition, the CARE program has a dedicated CARE 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 2014, over 3,000 enrollments resulted from the CARE 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 regularly engages branch office staff to provide training and presentations on the CARE and ESA Programs. Additionally, fifteen customer engagement fairs were held at branch office locations on high-traffic days to help customers enroll in CARE. In 2014, nearly 7,800 applications were completed at branch office locations resulting in 6,378 program enrollments.

Field Collection

SDG&E field collectors deliver notices to customers facing disconnection due to non-payment. Collectors are educated about the CARE program 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 of the collections call letter is included in Appendix

Informational Brochures

Brochures, featuring other energy-saving solutions, include information on the customer assistance programs. There are several examples including "The Whole House Guide," which offers customers information on residential energy efficiency resources

such as rebates, energy surveys and appliance recycling; “The Guide to SDG&E Services,” which details the various services offered like Gas Safety Check; and “The Floor to Ceiling Guide,” which contains helpful energy efficiency information. These brochures are available to customers through direct requests or at various outreach events.

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

SDG&E finds that the most effective outreach method is a comprehensive strategy that includes a coordinated mix of customer engagement, mass media education and direct marketing tactics. For example, SDG&E utilized a highly targeted multi-tactic campaign that employed direct marketing through direct mail and email, outbound calling, and door-to-door activity. This first tactic yielded an industry standard 3% enrollment for direct mail, while email provided an above average response of approximately 27%. As a second prong of this campaign, a sub-set of customers were contacted via outbound call resulting in an additional 3% enrollment. As the third prong of this campaign, another sub-set of customers were contacted via door-to-door resulting in a little less than 1% additional enrollment.

SDG&E also finds that collaboration with third party contractors is a necessary component to reaching and enrolling multilingual and harder-to-reach customers. For instance, The Harris Group, SDG&E’s door-to-door contractor, can reach further into the high density areas of the community where there may be larger population of CARE-eligible customers. Leveraging the trust and goodwill this partner has established in the community has also proven to be beneficial as nearly 8,000 program enrollments came from door-to-door efforts last year. Additionally, serving as one of SDG&E’s

multilingual/multicultural outreach partners, The Harris Group has also been present at many multicultural community events to raise awareness in communities where language or other cultural differences may be a barrier to program enrollment. Another example is SDG&E's partnership with 2-1-1 San Diego, a 24-hour resource and information hub in connecting people with community, health and disaster services. In 2014, the partnership with 2-1-1 San Diego contributed to 5,535 CARE program enrollments.

SDG&E's staff realizes that success of this program needs to be measured in two ways. The first is in generating enough overall program education and awareness through mass media and community outreach tactics to keep the program top of mind. The second is to generate and measure enrollment through direct marketing and customer engagement tactics like direct mail, door-to-door canvassing, phone campaigns, CBO partnership activities and presentations.

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

SDG&E's CARE program faces a number of barriers to program participation and must constantly evaluate and sometimes shift its focus in order to determine ways to counteract these challenges.

Economic Improvement

As the economy continues to improve²⁷, more and more customers are no longer eligible for this program. It is important to note that these losses contribute to the CARE attrition rate.

²⁷ San Diego County unemployment rate dropped from 6.5% in December 2013 to 5.2% in December 2014.

Hardest to Reach & Unwilling

SDG&E has persistently worked to reach and enroll customers through a variety of marketing, education and outreach campaigns. In 2014, 59,205 eligible new enrollment applications were received for the program. This approximately constitutes a 3% increase over what was received in 2013. SDG&E has enhanced both its outreach strategy and tactics in order to target eligible customers with the goal of achieving the 90% penetration rate. SDG&E has employed resources that include low or no cost approaches to maximize program awareness in these harder to reach communities. SDG&E understands and recognizes the remaining unenrolled population could be the hardest to reach and the most unwilling to participate. Continuing to work in the community through SDG&E's outreach partners, door-to-door and participation in multicultural/multilingual events will continue to be a key tactic utilized in reaching these hardest to reach customers.

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

SDG&E and Southern California Gas Company (SoCalGas) exchange a data file of the shared services territory in Southern Orange County. SDG&E conducts a data match of all CARE customers in that shared territory. If a customer is enrolled in the CARE program at SoCalGas and not at SDG&E, they will then automatically be enrolled. The reverse is done for SDG&E CARE customers. SDG&E enrolled approximately 300 customers through its data sharing efforts with SoCalGas.

In addition, SDG&E shares CARE customer data with California American Water (CalAm) to assist in identifying customers for their customer assistance programs.²⁸ In 2014, files were securely sent to CalAm in March and September.

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

In 2013, SDG&E launched a new online enrollment process for customers potentially eligible for one of three Customer Assistance Programs: CARE, FERA and the ESA Program. This process allows customers to submit qualifying program information via one web portal. The customer information is validated against SDG&E databases to provide customers with all of the programs that they may be potentially eligible for. At that point, the customer is prompted to submit enrollment information for CARE or FERA, request a contractor call back to schedule an appointment for the ESA Program, or is notified of non-qualification for any of the programs. In 2014, SDG&E has enrolled 20,703 customers to CARE through this process.

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

²⁸ D. 11-05-020, Ordering Paragraph 1.

leveraged information received from customers applying online for the ESA Program.

SDG&E enrolled over 2,812 customers to CARE by leveraging ESA Program enrollment information.

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

SDG&E coordinates a number of efforts to promote the CARE and ESA Programs with community based partners and social service agencies that offer other low-income programs such as CalFresh, Covered California, California Lifeline, LIHEAP, and more. These efforts include the CARE Partner program with social service agencies, the 2-1-1 San Diego contact and online resource center, SDG&E's Energy Solutions Partner Network consisting of over 250 grassroots organizations, and leveraging the efforts of LIHEAP contractors. These programs were leveraged through presentations, events, workshops, and customized partner network messaging.

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

As part of SDG&E's leveraging agreement with the California Department of Community Services and Development (CSD), SDG&E continues to promote the CSD's LIHEAP bill payment assistance and weatherization services. SDG&E provides CSD's telephone number on its applications and program materials so that customers can call for additional information. In addition, SDG&E CARE staff assists customers who call

regarding the CARE discount by providing information on how to receive bill assistance through CSD's Home Energy Assistance Program. In addition, SDG&E's agreement with 2-1-1²⁹ San Diego requires part of the customer screening to include referral to Low Income Home Energy Assistance Program (LIHEAP) agencies Campesinos Unidos, Inc., (CUI) and MAAC, as appropriate. In 2014, 2-1-1 San Diego handled nearly 34,000 utility-related calls and referred nearly 18,000 of those to LIHEAP agencies.

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

SDG&E seeks to improve the speed with which online customer applications are processed by implementing enhancements to its CARE system database. These improvements will automatically approve applications and help make is CARE processing increasingly cost-effective. The current process for online enrollment creates an application and submits it to the database for further review by a CARE processor. The new process would skip the review step and automatically send the enrollment to the billing system without needing additional processor to review prior to enrollment. This will not only reduce the number of applications requiring processor review, but will likely also reduce the number of related customer inquiries coming in via phone or email.

²⁹ 2-1-1 San Diego connects people 24/7 with free community, health, and disaster services.

2.5. Processing CARE Applications

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

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

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

SDG&E believes that collaboration with third party contractors is a necessary component in reaching and enrolling multilingual and harder-to-reach customers. The Harris Group (THG), SDG&E's door-to-door contractor, canvasses the high density areas of the community where there may be large population of CARE-eligible customers. THG is leveraging these efforts to complete recertification with eligible customers. In 2014, door-to-door efforts resulted in 1,777 recertifications. SDG&E has also partnered with 2-1-1 San Diego, a 24-hour resource and information hub connecting people with community, health and disaster services. Customers often contact 2-1-1 San Diego in an emergency to locate important resources including bill assistance programs, food, and shelter. In 2014, the partnership with 2-1-1 San Diego leveraged customers calling for utility bill assistance to help recertify more than 2,084 customers in the CARE Program.

SDG&E understands that success of this program needs to be measured in two ways. The first measure of success will be generating enough overall program education and awareness through mass media and community outreach tactics to keep the program top of mind. The second is customer engagement to generate and measure enrollment. For these harder-to-reach and underserved audiences, it is important to utilize a number of tactics; these include direct mail, door-to-door canvassing, phone campaigns, and outreach events and presentations. It is difficult to evaluate cost-effectiveness per tactic, given that some of these tactics can't be directly sourced to the actual customer enrollment. This would include mass media tactics like television, radio and print advertisements. Additionally, a customer may have been exposed to several of these outreach tactics prior to enrolling or recertifying in the program. SDG&E calculates cost-effectiveness by its overall investment in awareness and outreach efforts with outcomes in message reach and circulation, along with completed applications and enrollments.

2.6. Program Management

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

High Usage Verification (HUV)

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

- Provide a heightened income verification process for CARE

- Agree to participate in the ESA Program, allowing access to all metered areas of the property
- Reduce usage to below 600% of baseline and maintain that level for 24 months.

SDG&E launched a manual process in June of 2013, targeting the 50 highest users. Manually mailing and tracking information to the customers was extremely labor intensive and did not allow for SDG&E to implement this effort on a larger scale. SDG&E faced many challenges with the full implementation of the process. Through year-end 2014, SDG&E verified over 15,500 high usage customers manually. The primary and most prevalent issue was the complexity of the system changes required to complete the process. The process impacted both the CARE and ESA Program databases, as well as the SDG&E billing system. Over 125 programs require updating and changing in order to complete the process. Additionally, due to the high level of dependency on the coordination between CARE and ESA Program, significant modifications to both databases need to be completed to automate the process. SDG&E expects to address all system issues and to complete full implementation of the HUV process in 2015.

2.7. Pilots

In D.12-12-011 (CHANGES Decision) the Commission approved the continued funding for the Community Help and Awareness with Natural Gas and Electricity Services Pilot Program³⁰ (CHANGES) through the CARE Program budget for the

³⁰ On November 19, 2010, the Commission approved Resolution CSID-004 and approved the CHANGES Pilot Program and authorized CARE funding for the one-year Pilot Program for one-year. On November 10, 2011, the Commission issued Resolution CSID-005 which authorized continued CARE funding for the CHANGES Pilot Program. CSID did not authorize funding for the Pilot beyond December 31, 2012.

remainder of the 2012-2014 program cycle, or until alternate or complementary funding can be put into place, whichever is sooner. In D.14-08-030, the Commission approved continued funding for the CHANGE program through 2015, pending further review of the program pilot.

During 2014, SDG&E provided monthly reporting of CHANGES program activity, as directed in D.12-08-44.³¹ SDG&E also attended monthly meetings coordinated by Commission's Consumer Service and Information Division (CSID). SDG&E CARE Program Management also worked directly with the CHANGES contractor when needed in order to ensure that escalated customer issues were appropriately resolved.

2.8. Studies

SDG&E did not conduct any studies for the CARE program during 2014.

3. CARE EXPANSION PROGRAM

3.1. Participant Information

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

See CARE- Table 12- CARE Expansion Program.

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

<u>Facility Type</u>	<u>Electric</u>	<u>Gas</u>
Commercial	6,654	4,141
Residential	1,827	1,402

³¹ CHANGES program activity is reported monthly in CARE tables 10 and 11 of the CARE Program Monthly Report.

3.2. Usage Information

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

<u>Commodity</u>	<u>Residential</u>	<u>Commercial</u>
Gas	27	275
Electric	463	4,833

3.3. Program Cost

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

Expanded CARE program cost totaled \$ 5,735.69. These costs are associated with application processing. Costs for Program Management and Outreach are insignificant and are accounted for within the general CARE program budget.

3.3.1.1. Discount Information

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

Residential Facility Gas Discount - \$87.08

Residential Facility Electric Discount - \$195.24

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

Commercial Facility Gas Discount - \$552.95

Commercial Facility Electric Discount - \$1,958.89

3.4. Outreach

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

In addition to engagement activities performed on behalf of the CARE Program – most specifically presentations and workshops coordinated through the Energy Solutions Partner Network – SDG&E employees are one of the most effective outreach sources for providing program information on the Expanded CARE offering. SDG&E employees have the opportunity to attend employee informational events at least twice a year. These

events provide them with messaging and collateral on residential programs that they can share with family, friends, and their own personal networks. Many SDG&E employees also donate their time, talents and resources to local CBO's. These often provide a platform to discuss SDG&E Customer Assistance programs, including the Expanded CARE Program, with eligible nonprofit organizations.

SDG&E Customer Solutions Advisors in both the residential and business outreach groups are also able to identify opportunities to provide organizations with the information regarding program eligibility and participation.

3.4.2. Discuss each of the following:

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

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

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

SDG&E and SoCalGas do not currently share Expanded CARE facility information. SDG&E has one qualified Expanded CARE facility in the shared service territory.

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

The barrier to participation for Expanded CARE tends to come from the ability for these facilities to meet the guidelines – specifically 100% resident eligibility - of this program. When this issue arises, SDG&E’s Customer Solutions Outreach Advisors evaluate other energy-saving solutions in which these facilities may be able to participate. Additionally, to ensure that there is sufficient awareness about the Expanded CARE Program for nonprofit groups, an Outreach Advisor has been assigned to this customer segment to consult with organizations that may be eligible for this program.

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

SDG&E did not identify any recommendations to improve the cost effectiveness of the delivery of the Expanded CARE Program.

3.5. Program Management

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

SDG&E did not experience any significant program management issues in this reporting period.

4. FUND SHIFTING

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

During 2014, SDG&E shifted funds in accordance with the rules set forth in D.08-11-031, as modified by D.10-10-008, and reaffirmed in D.12-08-044. See ESA Program Table 12 which provides a detailed accounting of the fund shifting activity that occurred during 2014.

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

During 2014, SDG&E shifted funds in accordance with the rules set forth in D.08-11-031, as modified by D.10-10-008, and reaffirmed in D.12-08-044. SDG&E expenditures in Outreach, General Administration, Pilots and Regulatory Compliance exceeded authorized budget amounts. SDG&E leveraged excess funds in IT Programming to accommodate these expenditures. CARE Program Table 1 provides the detailed accounting of the fund shifting activity that occurred during 2014.

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

There was no ESA Program or CARE fund shifting activity that occurred that was outside of the rules set forth in Section 20.1 of D. 08-11-031, as modified in D.10-10-008, and reaffirmed in D.12-08-044 during 2014.

5. COMMONLY USED ACRONYMS

CARE	California Alternate Rates for Energy
CBO	Community-Based Organization
CFL	Compact Fluorescent Lamp
CPUC	California Public Utilities Commission
CSI	California Solar Initiative
D.	Decision
CSD	California Department of Community Services & Development
DDTP	Deaf and Disabled Telecommunications Program
DRP	Demand Response Program
DSM	Demand Side Management
EE	Energy Efficiency
ESA	Energy Savings Assistance
FERA	Family Electric Rate Assistance
HEAT	Home Energy Assistance Tracking
IHD	In Home Display
IOU	Investor-Owned Utility
kW	Kilowatt
kWh	Kilowatt Hour
LIEE	Low Income Energy Efficiency

LIHEAP	Low Income Home Energy Assistance Program
MOU	Memorandum of Understanding
mW	Megawatt
mWh	Megawatt Hour
NGAT	Natural Gas Appliance Testing
OP	Ordering Paragraph
PCT	Programmable Communicating Thermostat
PEV	Post Enrollment Verification
PFM	Petition for Modification
PG&E	Pacific Gas & Electric Company
PPP	Public Purpose Program
PY	Program Year
SCE	Southern California Edison
SDG&E	San Diego Gas & Electric Company
SoCalGas	Southern California Gas Company
TDD	Telecommunications Device for the Deaf
TRC	Total Resource Cost Test
UC	Utility Costs
SSI	Supplemental Security Income
SSD	Supplemental Security Disability
SSP	Social Security Pension

APPENDIX 1-5

ESA and CARE Programs

6. APPENDIX 1-5

ESA and CARE Programs:

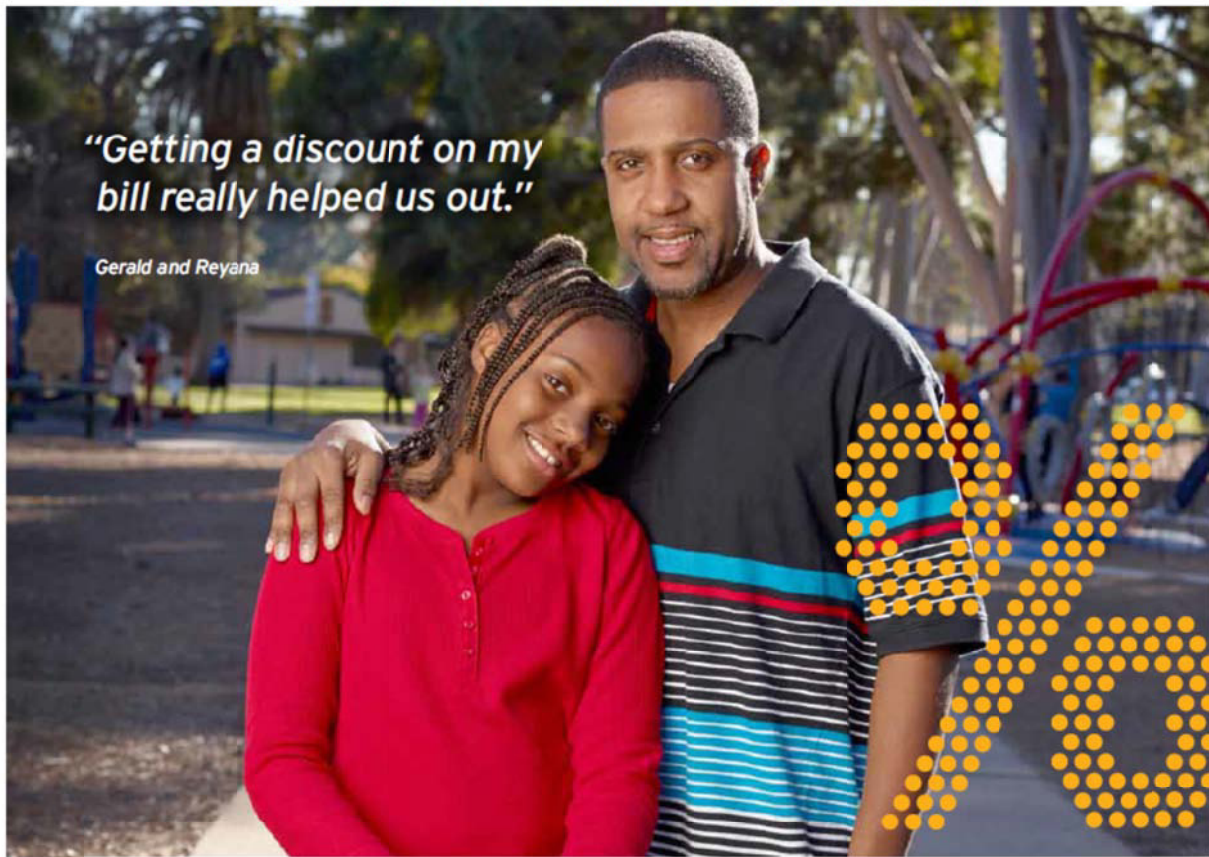
ESAP – No items

CARE

1. Print Ads
2. Email Campaign
3. Bill Insert
4. Energy Solutions Partner
5. Credit and Collections Notice

Appendix 1 - 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.**

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



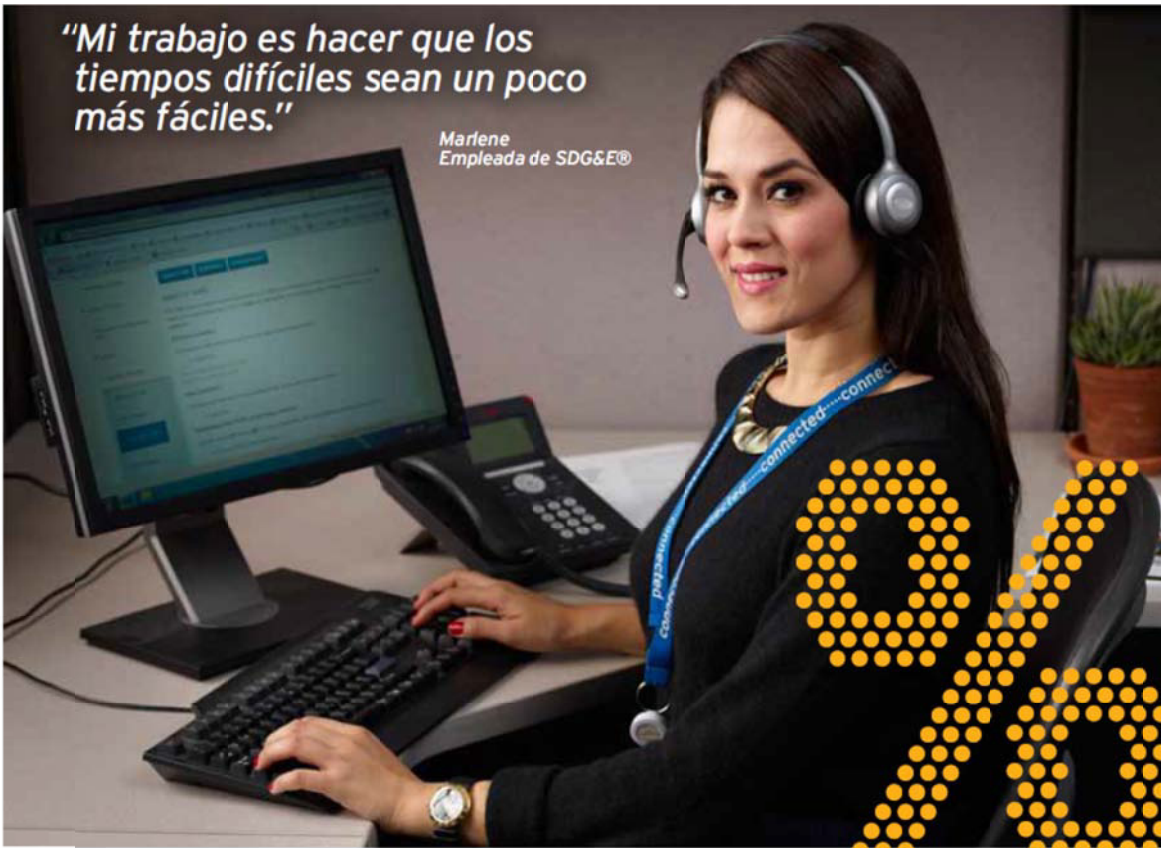
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4/25/14 4:20 PM

Appendix 1 (continued) - Spanish Print Ad



"Mi trabajo es hacer que los tiempos difíciles sean un poco más fáciles."

Marlene
Empleada de SDG&E®

conectados

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) 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®



connectedvới 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 hay gọi 211.



Chương trình này được tài trợ bởi khách hàng tiện 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) 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 或致電 211。

SDG&E connected
A Sempra Energy utility®

本計劃由加州能源客戶單位, 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) 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 or call 211.

SDGE^{connected}
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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Appendix 2 – Email Campaign



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

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 sobadosa@sempnautilities.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 utility customers and administered by San Diego Gas & Electric under the auspices of the California Public Utilities Commission. SDG&E makes no representations as to the safety, reliability and/or efficiency of good and service 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 – Bill Insert



BUSINESS REPLY MAIL
FIRST CLASS PERMIT NO. 1017 SAN DIEGO, CA 92112

POSTAGE WILL BE PAID BY ADDRESSEE

ATTN: CARE PROGRAM
SAN DIEGO GAS & ELECTRIC
PO BOX 2524
SAN DIEGO CA 92112-9915

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

Save energy

Energy Savings Assistance Program
Free energy saving home improvements
1-866-591-0591
sdge.com/energyassistance

Energy Savings Assistance Program
Home rebates
Rebates on energy efficient products for your home
1-800-444-6333
sdge.com/rebates

My energy survey
Free on-site analysis
1-800-444-6333
sdge.com/survey

Get extra help

Level your energy bill payments every month
1-800-411-7343
sdge.com/levelup

Bill payment assistance and other community resources
Dual "211"
211andiego.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

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

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

Ahorre energía

Energy Savings Assistance Program
Mejores ofertas que ahorran energía en el hogar
1-866-591-0591
sdge.com/casa

Energy Savings Assistance Program
Rebolsos en productos eficientes en energía para su hogar
1-800-444-6333
sdge.com/rebolsos

Análisis de mi Consumo de Energía
Lláme al 1-800-444-6333 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

Niveles de pago mensuales de su factura de energía
Lláme al 1-800-311-7343 y pregunte por el Plan de Pago Nivelado (Level Pay Plan)

Asistencia para el pago de la factura y otros recursos de la comunidad
Marque "211"
211andiego.org

LINEAP
Servicios 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

ISSUANCE CODE 40

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16-0457 04/08/2012 04/08/2014



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 households of 3 or more people with a slightly higher income than required for CARE. See the FERA income guidelines below to find out if you qualify.

Rules for CARE and FERA participation

- You must notify SDG&E of your income change.
- You may be asked to verify your income.
- You must renew your enrollment when required.
- You may not be claimed as 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: sdgandiego.com 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	FERA	Not Eligible
1 or 2	\$31,460		
3	\$39,580	\$39,581 - \$49,475	
4	\$47,700	\$47,701 - \$59,625	
5	\$55,820	\$55,821 - \$69,775	
6	\$63,940	\$63,941 - \$79,925	
7	\$72,060	\$72,061 - \$96,075	
8	\$80,180	\$80,181 - \$109,225	
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.

- Tarifa 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 una vez 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, si vive en un hogar con 3 o más personas que reúnen los requisitos en las facturas eléctricas de los hogares con 3 o más personas que reúnen los requisitos de ingreso se le puede dar el derecho a participar en el programa FERA que le da derecho a participar.

Reglas de participación para CARE y FERA

- Tiene que notificar a SDG&E si su ingreso cambia.
- Le pueden pedir que compruebe su ingreso.
- Debe renovar su solicitud cuando le sea requerido.
- No puede aparecer como 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 actual en el hogar (todo el ingreso, incluidos subsidios militares, 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 o que aporrecen en el cuadro 0 su hogar debe estar recibiendo beneficios de uno de los programas de asistencia pública indicados en el cuadro 2A del formulario.

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

REQUISITOS DE INGRESO PARA LOS PROGRAMAS CARE Y FERA			
Número de personas	CARE	FERA	No reúne los requisitos
1 or 2	\$31,460		
3	\$39,580	\$39,581 - \$49,475	
4	\$47,700	\$47,701 - \$59,625	
5	\$55,820	\$55,821 - \$69,775	
6	\$63,940	\$63,941 - \$79,925	
7	\$72,060	\$72,061 - \$96,075	
8	\$80,180	\$80,181 - \$109,225	
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: Su nombre _____ 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 other section 2A OR 2B, then go to section 3

2A Public Assistance Programs: (For CARE or FERA Programs)
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.

☐ Medi-Cal/CalFresh (Medi-Cal) ☐ Women, Infants and Children program (WIC) ☐ Medi-Cal for Families A & B ☐ National School Lunch Program (NSLP) ☐ CalFresh (Food Stamp)/SNAP ☐ Low Income Home Energy Assistance Program (LIHEAP) ☐ Tribal Only ☐ Supplemental Security Income (SSI) ☐ Bureau of Indian Affairs General Assistance ☐ California (TANF) or Tribal TANF

OR

2B If you do not participate in any of the above programs, please complete Section 2B.
If your household does not participate in a public assistance program, please check all sources of household income. If none of the above, list all other sources of income in the space provided.

☐ Wages and/or profits from self employment ☐ Interest/dividends from savings, stocks, bonds or retirement accounts ☐ Social Security ☐ Pension ☐ SSI or SSDI ☐ Disability or workers' compensation payments ☐ Housing or military subsidies ☐ Unemployment benefits

Total annual 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 agree 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:** _____ **Fecha:** _____

Appendix 4- Energy Solutions Partner San Diego OASIS

Energy Solutions Partner Network Highlight | CONNECTing

Organization Overview

Organization Name: San Diego OASIS
 Target Audience: Seniors - 50+
 Mission: To promote successful aging through a three-fold approach: lifelong learning, healthy living and community service.
 Current membership: 36,900



Partnership Overview

As part of SDG&E's Energy Solutions Partner Network, San Diego Oasis has made connecting the seniors they serve to energy saving solutions a priority in 2013 and 2014. Through a variety of tactics including hand-on workshops, presentations, events and communications, San Diego Oasis has spearheaded over 30 activities in support of various programs, services and tools. Key programs highlighted as part of this partnership include bill discounts (CARE/FERA and Medical Baseline), home upgrades (ESA, EUC), online tools (My Account, energy alerts, RYU), safety (emergency prep, gas safety) and rebates.

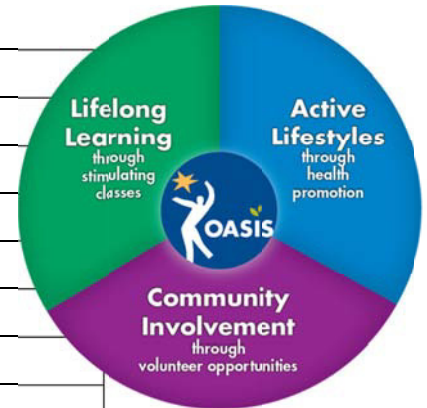
Results: 30+ activities directly serving its 23,000 members

- ✓ **Quarterly hands-on workshops** connecting people ages 50+ to customized energy solutions including:
 - Online enrollment in Customer Assistance programs (CARE, ESA and Medical Baseline)
 - My Account
 - Energy use alerts and Reduce Your Use Alerts
 - My Energy online home audit
- ✓ **11 presentations** to membership and organizational leadership
- ✓ **Annual and seasonal events** including a year technology fair for seniors
- ✓ **Feature on OASIS home page** which has an average of 93,000 visitors monthly
- ✓ **Development of YouTube video** highlighting SDG&E partnership and featuring San Diego County Supervisor Ron Roberts
- ✓ **12 monthly energy saving messages** featured on social media channels
- ✓ **On-site program applications** available onsite at OASIS locations



San Diego OASIS - Activity Details

<i>Date</i>	<i>Activity</i>
6/25/2013	North County Inland Partner Briefing
9/13/2013	Member Presentation
9/23/2013	Member Presentation
10/19/2013	Escondido Health Fair
11/8/2013	Energy Solutions Partner Network Roundtable
2/12/2014	Winter Solutions Presentation
2/12/2014	Solutions Workshop #1
2/12/2014	Solutions Workshop #2
2/25/2014	Facebook Post - Gas Safety
4/2/2014	Spring Solutions Presentation
4/8/2014	Spring Solutions Presentation
4/8/2014	Facebook Post - Rebates
5/7/2014	Facebook Post - Home Upgrade
5/13/2014	Spring Solutions Presentation / My Account Workshop
5/14/2014	Facebook Post - Fire Conservation
5/15/2014	Eblast - Fire Conservation
5/15/2014	Facebook Post - Fire Conservation
6/11/2014	Presentation - Summer Solutions
6/11/2014	Facebook Post - Reduce Your Use
7/14/2014	Summer Solutions Presentation
7/25/2014	Tweet - Cool Zones
8/4/2014	Facebook Post - Oasis Partner Video
8/12/2014	Facebook Post - CARE
8/21/2014	Summer Networking Event
9/9/2014	Presentation - Fall/Preparedness
9/9/2014	Facebook Post - Energy Use Alerts
9/16/2014	Workshop - My Account/Fall Solutions
9/17/2014	Facebook Post - RYU
10/2/2014	Facebook Post - Mobile App



Appendix 5 - 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. 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.
- With your phone using our mobile app. Visit 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.

ACCOUNT NUMBER:
1234567890

DATE DUE MM/DD/YY

7. **APPENDIX: ENERGY SAVINGS ASSISTANCE PROGRAM TABLES AND CARE TABLES**

Summary Table – ESA Program and CARE Program

ESA Program- Table 1- Overall Program Expenses

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

ESA Program- Table 3- Cost Effectiveness

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

ESA Program- Table 5- Direct Purchases & Installation Contractors

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

ESA Program- Table 7- Expenditures by Cost Elements

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

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

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

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

ESA Program- Table 12- Fund Shifting

ESA Program- Table 13- Categorical Enrollment

ESA Program- Table 14- Leveraging and Integration

ESA Program- Table 15- Lighting

ESA Program- Table 16- “Add Back” Measures

CARE- Table 1- CARE Overall Program Expenses

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

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

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

CARE- Table 4- Self Certification and Re-Certification

CARE- Table 5- Enrollment by County

CARE- Table 6- Recertification Results

CARE- Table 7- Capitation Contractors

CARE- Table 8- Participants per Month

CARE- Table 9- Average Monthly Usage & Bill

CARE- Table 10- CARE Surcharge & Revenue

CARE- Table 11- CARE Capitation Applications

CARE- Table 12- CARE Expansion Program

CARE- Table 13- CARE High Usage Verification Results

CARE- Table 14- CARE Categorical Enrollment

San Diego Gas Electric Company

Energy Savings Assistance Program and CARE Program 2014 Summary Highlights

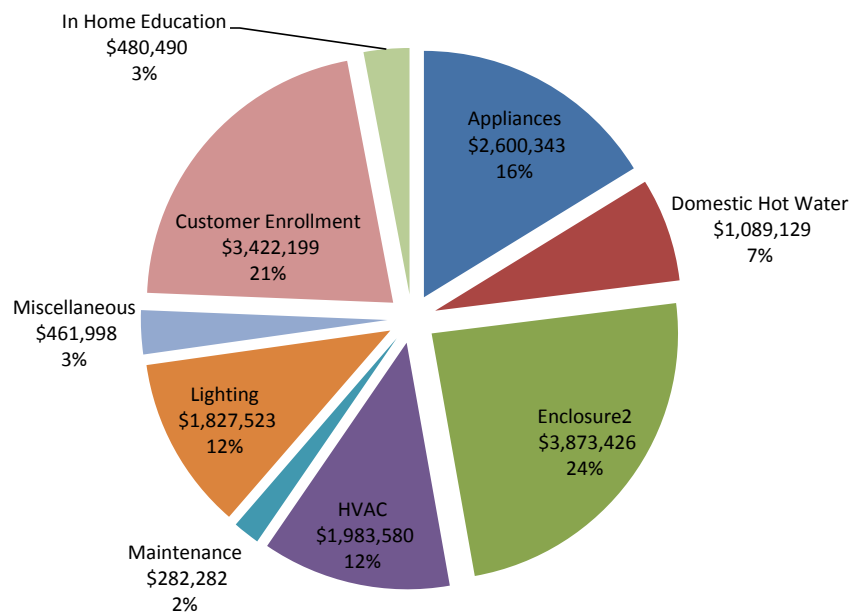
ESA Program

2014 Energy Savings Assistance Program Summary			
2014	Authorized / Planning Assumptions	Actual	%
Budget	\$26,904,989	\$19,143,282	71%
Homes Treated	20,316	22,039	108%
kWh Saved	8,416,623	7,103,514	84%
kW Demand Reduced	2,017	692	34%
Therms Saved	283,727	352,100	124%

CARE Program

2014 CARE Summary			
2014	Authorized Budget	Actual	%
Administrative Expenses	\$5,503,805	\$4,530,706	82%
Subsidies	\$83,614,933	\$63,897,068	76%
Service Establishment Charge	\$0	\$0	0%
Total Program Costs and Discounts	\$89,118,738	\$68,427,774	77%
2014 CARE New Enrollments	Automatically Enrolled via Data Sharing, ESA Participation, etc	Self Certified as Categorically Eligible	Self Certified as Income Eligible
Method	3,217	22,626	33,362
2014 CARE Penetration	Estimated Eligible Participants	Participants	Penetration Rate
Total Enrolled	368,229	278,931	76%

2014 ESA Program Expenditures by Measure Group



San Diego Gas Electric Company

	A	B	C	D	E	F	G	H	I	J
1	PY 2014 Energy Savings Assistance Program Annual Report ESAP Table 1 ESAP Overall Program Expenses									
2		2014 Authorized Budget^{1,2}			2014 Annual Expenses			% of Budget Spent		
3	ESA Program:	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
4	Energy Efficiency									
5	Appliances	\$ 3,626,319	\$ 1,306,214	\$ 4,932,533	\$ 1,959,297	\$ 641,046	\$ 2,600,343	54%	49%	53%
6	Domestic Hot Water ²	\$ 58,325	\$ 1,997,193	\$ 2,055,518	\$ 32,674	\$ 1,056,455	\$ 1,089,129	56%	53%	53%
7	Enclosure ²	\$ 1,850,540	\$ 2,739,307	\$ 4,589,847	\$ 1,665,573	\$ 2,207,853	\$ 3,873,426	90%	81%	84%
8	HVAC	\$ 392,199	\$ 3,535,658	\$ 3,927,856	\$ 118,064	\$ 1,865,516	\$ 1,983,580	30%	53%	51%
9	Maintenance	\$ 4,464	\$ 566,414	\$ 570,879	\$ 125	\$ 282,157	\$ 282,282	3%	50%	49%
10	Lighting	\$ 2,775,286	\$ -	\$ 2,775,286	\$ 1,827,523	\$ -	\$ 1,827,523	66%	N/A	66%
11	Miscellaneous	\$ 484,540	\$ -	\$ 484,540	\$ 461,998	\$ -	\$ 461,998	95%	N/A	95%
12	Customer Enrollment	\$ 1,692,820	\$ 1,692,820	\$ 3,385,641	\$ 1,711,100	\$ 1,711,100	\$ 3,422,199	101%	101%	101%
13	In Home Education	\$ 215,167	\$ 215,167	\$ 430,334	\$ 240,245	\$ 240,245	\$ 480,490	112%	112%	112%
14	Pilot	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	N/A	N/A	N/A
15	Energy Efficiency TOTAL	\$ 11,099,660	\$ 12,052,774	\$ 23,152,434	\$ 8,016,599	\$ 8,004,373	\$ 16,020,971	72%	66%	69%
16										
17	Training Center	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	N/A	N/A	N/A
18	Inspections	\$ 49,603	\$ 49,603	\$ 99,206	\$ 41,277	\$ 41,276	\$ 82,553	83%	83%	83%
19	Marketing and Outreach	\$ 582,359	\$ 582,359	\$ 1,164,718	\$ 368,516	\$ 368,516	\$ 737,032	63%	63%	63%
20	Statewide Marketing Education and Outreach	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	N/A	N/A	N/A
21	Measurement and Evaluation Studies	\$ 57,500	\$ 57,500	\$ 115,000	\$ 100,692	\$ 100,692	\$ 201,384	175%	175%	175%
22	Regulatory Compliance	\$ 161,107	\$ 161,107	\$ 322,214	\$ 121,299	\$ 121,299	\$ 242,598	75%	75%	75%
23	General Administration	\$ 1,003,209	\$ 1,003,209	\$ 2,006,417	\$ 925,859	\$ 925,858	\$ 1,851,717	92%	92%	92%
24	CPUC Energy Division	\$ 22,500	\$ 22,500	\$ 45,000	\$ 3,513	\$ 3,513	\$ 7,027	16%	16%	16%
25										
26	TOTAL PROGRAM COSTS	\$ 12,975,937	\$ 13,929,051	\$ 26,904,989	\$ 9,577,755	\$ 9,565,527	\$ 19,143,282	74%	69%	71%
27	Funded Outside of ESA Program Budget									
28	Indirect Costs				\$ 464,347	\$ 468,155	\$ 932,502			
29	NGAT Costs					\$ 227,223	\$ 227,223			
30										
31	[1]Per D.14-08-030 Authorized budget includes \$3,132,739 in fund shifting of carryover from prior years, and \$1,256,632 in budget augmentation in the following categories: Appliances, Domestic Hot Water, Enclosure, HVAC, Customer Enrollment, and Inspections. D.14-08-030 Authorized \$23,772,250 plus fund shift of carryforward \$3,132,739 = \$26,904,989. Original 2014 Authorized \$22,515,618 plus fund shift of carryforward \$3,132,739 + Budget augmentation \$1,256,632 = \$26,904,989									
32	[2] Correction to electric and gas budget split in Domestic Hot Water and Enclosure due to error found in calculation of fundshifting offset applied by measure. This error resulted in an increase of \$109 electric budget, and a decrease of (\$109) gas budget for Domestic Hot Water, and an increase of \$44,027 electric budget, and a decrease of (\$44,027) gas budget for Enclosure.									

San Diego Gas Electric Company

	A	B	C	D	E	F	G	H
1	PY 2014 Energy Savings Assistance Program Annual Report ESAP Table 2 ESAP Expenses and Energy Savings by Measures Installed							
2			PY Completed & Expensed Installations					
3	Measures	Units	Quantity Installed	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses (\$)	% of Expenditure
4	Appliances							
5	High Efficiency Clothes Washer	Each	949	25,313	-	33,411	\$ 641,046	4.00%
6	Refrigerators	Each	1,992	1,379,558	235	-	\$ 1,412,847	8.82%
7	Microwaves [2]	Each	5,749	(105,098)	-	123,743	\$ 546,450	3.41%
8	Domestic Hot Water							
9	Water Heater Blanket	Home	521	443	0	1,702	\$ 22,708	0.14%
10	Low Flow Shower Head	Home	8,527	14,529	3	30,781	\$ 435,623	2.72%
11	Water Heater Pipe Insulation	Home	358	454	0	271	\$ 5,613	0.04%
12	Faucet Aerator	Home	18,696	15,519	3	35,500	\$ 150,096	0.94%
13	Water Heater Repair/Replacement	Each	2,585	-	-	-	\$ 195,397	1.22%
14	Thermostatic Shower Valve	Each	5,808	132,867	-	74,419	\$ 279,691	1.75%
15	Enclosure							
16	Air Sealing / Envelope	Home	10,175	297,376	-	31,473	\$ 3,198,466	19.96%
17	Attic Insulation	Home	670	37,538	44	5,646	\$ 674,960	4.21%
18	HVAC							
19	FAU Standing Pilot Light Conversion	Each	39	-	-	1,638	\$ 11,700	0.07%
20	Furnace Repair/Replacement	Each	3,460	-	-	-	\$ 1,763,543	11.01%
21	Room A/C Replacement	Each	122	4,717	6	-	\$ 118,064	0.74%
22	Central A/C Replacement	Each	-	-	-	-	\$ -	0.00%
23	Heat Pump Replacement	Each	-	-	-	-	\$ -	0.00%
24	Evaporative Coolers (Replacement)	Each	-	-	-	-	\$ -	0.00%
25	Evaporative Coolers (Installation)	Each	-	-	-	-	\$ -	0.00%
26	Duct Testing and Sealing [1]	Home	613	-	-	-	\$ 90,273	0.56%
27	Maintenance							
28	Furnace Clean and Tune	Home	3,969	-	-	13,517	\$ 282,157	1.76%
29	Central A/C Tune-up	Home	1	215	-	-	\$ 125	0.00%
30	Evaporative Cooler Maintenance	Home	-	-	-	-	\$ -	0.00%
31	Lighting							
32	Compact Fluorescent Lights (CFLs)	Each	125,932	2,207,374	252	-	\$ 869,038	5.42%
33	Interior Hard wired CFL fixtures	Each	2,219	90,216	10	-	\$ 136,592	0.85%
34	Exterior Hard wired CFL fixtures	Each	1,754	82,771	-	-	\$ 80,687	0.50%
35	Torchiere	Each	6,922	1,322,102	138	-	\$ 553,842	3.46%
36	Occupancy Sensor	Each	-	-	-	-	\$ -	0.00%
37	LED Night Lights	Each	59,454	607,620	-	-	\$ 187,363	1.17%
38	Miscellaneous							
39	Pool Pumps	Each	-	-	-	-	\$ -	0.00%
40	Smart Power Strips	Each	13,200	990,000	-	-	\$ 461,998	2.88%
41	Pilots							
42		Each						0.00%
43		Each						0.00%
44	Customer Enrollment							
45	Outreach & Assessment	Home	22,059	-	-	-	\$ 3,422,199	21.36%
46	In-Home Education	Home	21,996	-	-	-	\$ 480,490	3.00%
47								
48	Total Savings and Expenditures			7,103,514	692	352,100	\$ 16,020,971	100.00%
49								
50	Homes Weatherized	Home	9,538					
51								
52	Homes Treated							
53	- Single Family Homes Treated	Home	8,485					
54	- Multi-family Homes Treated	Home	12,309					
55	- Mobile Homes Treated	Home	1,245					
56	- Total Number of Homes Treated	Home	22,039					
57	# Eligible Homes to be Treated in 2014	Home	20,316					
58	% OF Homes Treated	%	108%					
59	- Total Master-Metered Homes Treated	Home	752					
60								
61								
62	[1] For Duct testing and sealing, number represents 120 homes both tested and sealed in the amount of \$47,374. 493 homes received duct testing only in the amount of \$42,899. There are no energy savings associated with duct testing.							

San Diego Gas Electric Company

	A	B	C	D	E	F	G
1	PY 2014 Energy Savings Assistance Program Annual Report ESAP Table 3 ESAP Cost-Effectiveness						
2		PY - Recorded					
3		Ratio of Benefits Over Costs			Net Benefits		
4	Program Year	Utility Cost Test	Total Resource Cost Test	Modified Participant Test	Utility Cost Test	Total Resource Cost Test	Modified Participant Test
5	2014	0.63	0.47	0.66	\$ (6,857,471)	\$ (9,875,940)	\$ (6,528,676)
6	2013	0.51	0.40	0.60	\$ (8,155,801)	\$ (9,943,021)	\$ (7,146,892)
7	2012	0.68	0.53	0.86	\$ (6,858,625)	\$ (10,037,753)	\$ (2,953,674)
8	2011	0.45	0.33	0.90	\$ (11,090,027)	\$ (13,403,509)	\$ (2,139,522)
9	2010	0.50	0.38	0.95	\$ (9,449,217)	\$ (11,642,291)	\$ (1,079,270)
10	2009	0.54	0.42	0.83	\$ (7,204,451)	\$ (9,201,740)	\$ (2,809,076)
11	2008	0.64	0.52	0.77	\$ (6,120,166)	\$ (8,121,185)	\$ (4,070,011)
12	2007	0.41	0.32	0.62	\$ (7,781,493)	\$ (8,954,377)	\$ (4,866,416)
13	2006	0.33	0.54	0.61	\$ (9,883,548)	\$ (6,602,546)	\$ (5,837,643)
14	2005	0.45	0.70	0.99	\$ (7,115,009)	\$ (3,896,685)	\$ (66,902)
15	2004	0.47	0.73	1.07	\$ (7,584,889)	\$ (3,905,982)	\$ 938,847
16	2003	0.47	0.66	1.01	\$ (6,793,286)	\$ (4,419,991)	\$ 122,456
17	2002	0.41	0.63	0.83	\$ (7,298,174)	\$ (4,597,814)	\$ (2,053,787)
18							
19							
20							

San Diego Gas Electric Company

PY 2014 Energy Savings Assistance Program Annual Report
ESAP Table 4
Detail by Housing Type and Source

		2014 Energy Savings				
Customer	Housing Type	# Homes Treated	(mWh)	MW	(mTherm*)	2014 Expenses¹
Gas and Electric Customers						
Owners - Total		4,585	2,013	0.2407	137.1	\$ 6,763,898
	Single Family	2,951	1,449	0.1779	105.6	\$ 5,027,121
	Multi Family	508	193	0.0180	6.7	\$ 374,223
	Mobile Homes	1,126	371	0.0448	24.8	\$ 1,362,554
Renters - Total		15,840	4,130	0.3951	215.0	\$ 8,445,948
	Single Family	5,001	1,853	0.2096	128.2	\$ 4,271,709
	Multi Family	10,736	2,244	0.1814	84.3	\$ 4,094,101
	Mobile Homes	103	33	0.0040	2.5	\$ 80,138
Electric Customers (only)						
Owners - Total		394	317	0.0233	-	\$ 275,111
	Single Family	290	255	0.0200	-	\$ 219,881
	Multi Family	91	56	0.0028	-	\$ 49,469
	Mobile Homes	13	6	0.0006	-	\$ 5,761
Renters - Total		1,220	644	0.0326	-	\$ 536,015
	Single Family	243	219	0.0148	-	\$ 176,264
	Multi Family	974	422	0.0175	-	\$ 358,032
	Mobile Homes	3	3	0.0002	-	\$ 1,719
Gas Customers (only)						
Owners - Total		-	-	-	-	-
	Single Family					
	Multi Family					
	Mobile Homes					
Renters - Total		-	-	-	-	-
	Single Family					
	Multi Family					
	Mobile Homes					
Totals:		22,039	7,104	0.6916	352	16,020,971

Penetration History				
Year	Homes Treated ²	Ineligible & Unwilling ³	Estimated Eligible in Current Year ⁴	Current Year Penetration Rate for Homes Treated
2002	14,089			
2003	15,706			
2004	14,897			
2005	11,254			
2006	13,771			
2007	13,074			
2008	20,804			
2009	20,927	6,685	20,384	103%
2010	21,593	8,690	20,384	106%
2011	22,575	8,423	20,384	111%
2012	22,415	7,871	20,316	110%
2013	17,568	13,411	20,316	86%
2014	22,039	15,738	20,316	108%
2015				
2016				
2017				
2018				
2019				
2020				
Total Homes Treated since 2002	230,712	60,818	122,100	

¹Excluding indirect program costs.

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

³ Define Ineligible & Unwilling.

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

Year	Utility in Shared Service Territory	Eligible Households in Shared Service Territory	Eligible households treated by both utilities in shared service territory
2014	SoCalGas	18,668	48

San Diego Gas Electric Company

	A	B	C	D	E	F	G
1	PY 2014 Energy Savings Assistance Program Annual Report ESAP Table 5 ESAP Direct Purchases & Installation Contractors						
2	Contractor	County	Contractor Type (Check one or more if applicable)				2014 Annual Expenditures
3			Private	CBO	WMDVBE	LIHEAP	
4	AMERICAN INSULATION INC	San Diego	x		x		\$ 1,287,610
5	AMERIMEX	San Diego	x		x		\$ 188,334
6	CAMPESINOS UNIDOS INC	San Diego		x	x	x	\$ 395,819
7	CAPITAL STATE CONTRUCTION	San Diego	x				\$ 1,085,178
8	EAGLE SYSTEMS INTERNATIONAL INC	San Diego	x				\$ 709,954
9	JERRY'S HEATING & AIR CONDITIONING, INC	San Diego	x				\$ 695,392
10	MAAC PROJECT	San Diego		x	x	x	\$ 564,819
11	R&B WHOLESALE DISTRIBUTOR INC	San Diego	x				\$ 2,054,559
12	RANCHO ENERGY SERVICES	San Diego	x		x		\$ 1,924,038
13	RELIABLE ENERGY MANAGEMENT INC	San Diego			x		\$ 47,750
14	RICHARD HEATH & ASSOCIATES INC	San Diego, Orange	x		x		\$ 6,067,780
15	THA HEATING AND AIR CONDITIONING INC	San Diego	x				\$ 630,478
16	TOWN & COUNTRY PROPERTY INSPECTIONS LLC	San Diego			x		\$ 58,376
17	ESPINOZAS HEATING & AIR	San Diego	x		x		\$ 310,882
18	Total Contractor Expenditures						\$ 16,020,971

San Diego Gas Electric Company

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
1	PY 2014 Energy Savings Assistance Program Annual Report ESAP Table 6 ESAP Installation Cost of Program Installation Contractors																		
2		Unit of Measure	CBO/WMDVBE						Non-CBO/WMDVBE						2014 Program Total				
3			Installations		Dwellings		Costs		Installations		Dwellings		Costs		Units Installed	Households [1]	Costs	Cost/ Unit	Cost/ Household
4			Units	%	Units	%	\$	%	Units	%	Units	%	\$	%					
5	Dwellings	Each	286,737	90%	20,920	82%	\$ 10,846,341	68%	31,033	10%	4,498	18%	\$ 5,174,630	32%	317,770	25,418	\$ 16,020,971	\$ 50.42	\$ 630.30
6	Appliances																		
7	High Efficiency Clothes Washer	Each	-	0%	-	0%	\$ -	0%	949	100%	949	100%	\$ 641,046	100%	949	949	\$ 641,046	\$ 675	\$ 675
8	Refrigerators	Each	-	0%	-	0%	\$ -	0%	1,992	100%	1,956	100%	\$ 1,412,847	100%	1,992	1,956	\$ 1,412,847	\$ 709	\$ 722
9	Microwaves	Each	4,947	86%	4,954	86%	\$ 470,260	86%	802	14%	802	14%	\$ 76,190	14%	5,749	5,756	\$ 546,450	\$ 95	\$ 95
10	Domestic Hot Water																		
11	Water Heater Blanket	Home	474	91%	474	91%	\$ 20,664	91%	47	9%	47	9%	\$ 2,045	9%	521	521	\$ 22,708	\$ 44	\$ 44
12	Low Flow Shower Head	Home	5,806	68%	5,806	68%	\$ 302,113	69%	2,721	32%	2,721	32%	\$ 133,510	31%	8,527	8,527	\$ 435,623	\$ 51	\$ 51
13	Water Heater Pipe Insulation	Home	223	62%	223	62%	\$ 3,227	57%	135	38%	135	38%	\$ 2,386	43%	358	358	\$ 5,613	\$ 16	\$ 16
14	Faucet Aerator	Home	16,750	90%	16,750	90%	\$ 133,033	89%	1,946	10%	1,946	10%	\$ 17,063	11%	18,696	18,696	\$ 150,096	\$ 8	\$ 8
15	Water Heater Repair/Replacement	Each	2,035	79%	686	69%	\$ 101,264	52%	550	21%	309	31%	\$ 94,134	48%	2,585	995	\$ 195,397	\$ 76	\$ 196
16	Thermostatic Shower Valve	Each	3,574	62%	2,430	61%	\$ 172,124	62%	2,234	38%	1,544	39%	\$ 107,567	38%	5,808	3,974	\$ 279,691	\$ 48	\$ 70
17	Enclosure																		
18	Air Sealing / Envelope	Home	6,851	67%	6,851	67%	\$ 2,213,048	69%	3,324	33%	3,324	33%	\$ 985,419	31%	10,175	10,175	\$ 3,198,466	\$ 314	\$ 314
19	Attic Insulation	Home	550	82%	550	82%	\$ 560,519	83%	120	18%	120	18%	\$ 114,441	17%	670	670	\$ 674,960	\$ 1,007	\$ 1,007
20	HVAC																		
21	FAU Standing Pilot Light Conversion	Each	24	62%	24	62%	\$ 7,200	62%	15	38%	15	38%	\$ 4,500	38%	39	39	\$ 11,700	\$ 300	\$ 300
22	Furnace Repair/Replacement	Each	2,716	78%	2,716	78%	\$ 570,830	32%	744	22%	744	22%	\$ 1,192,713	68%	3,460	3,460	\$ 1,763,543	\$ 510	\$ 510
23	Room A/C Replacement	Each	122	100%	116	100%	\$ 118,064	100%	-	0%	-	0%	\$ -	0%	122	116	\$ 118,064	\$ 968	\$ 1,018
24	Central A/C Replacement	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
25	Heat Pump Replacement	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
26	Evaporative Coolers (Replacement)	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
27	Evaporative Coolers (Installation)	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
28	Duct Testing and Sealing [2]	Home	522	85%	522	85%	\$ 51,101	57%	91	15%	91	15%	\$ 39,172	43%	613	613	\$ 90,273	\$ 147	\$ 147
29	Maintenance																		
30	Furnace Clean and Tune	Home	3,823	96%	3,823	96%	\$ 280,490	99%	146	4%	146	4%	\$ 1,668	1%	3,969	3,969	\$ 282,157	\$ 71	\$ 71
31	Central A/C Tune-up	Home	-	0%	-	0%	\$ -	0%	1	100%	1	100%	\$ 125	100%	1	1	\$ 125	\$ 125	\$ 125
32	Evaporative Cooler Maintenance	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
33	Lighting																		
34	Compact Fluorescent Lights (CFLs)	Each	116,934	93%	22,460	94%	\$ 806,952	93%	8,998	7%	1,431	6%	\$ 62,086	7%	125,932	23,891	\$ 869,038	\$ 7	\$ 36
35	Interior Hard wired CFL fixtures	Each	1,930	87%	921	86%	\$ 118,819	87%	289	13%	145	14%	\$ 17,774	13%	2,219	1,066	\$ 136,592	\$ 62	\$ 128
36	Exterior Hard wired CFL fixtures	Each	1,381	79%	897	77%	\$ 63,529	79%	373	21%	262	23%	\$ 17,158	21%	1,754	1,159	\$ 80,687	\$ 46	\$ 70
37	Torchiere	Each	6,058	88%	3,991	85%	\$ 484,722	88%	864	12%	726	15%	\$ 69,120	12%	6,922	4,717	\$ 553,842	\$ 80	\$ 117
38	Occupancy Sensor	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
39	LED Night Lights	Each	58,108	98%	20,605	97%	\$ 183,056	98%	1,346	2%	678	3%	\$ 4,307	2%	59,454	21,283	\$ 187,363	\$ 3	\$ 9
40	Miscellaneous																		
41	Pool Pumps	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
42	Smart Power Strips	Each	12,452	94%	9,841	94%	\$ 435,818	94%	748	6%	656	6%	\$ 26,180	6%	13,200	10,497	\$ 461,998	\$ 35	\$ 44
43	Pilots																		
44		Each		0%						0%					-	-	\$ -	\$ -	\$ -
45		Each		0%						0%					-	-	\$ -	\$ -	\$ -
46	Customer Enrollment																		
47	Outreach & Assessment	Home	20,751	94%	20,751	94%	\$ 3,296,088	96%	1,308	6%	1,308	6%	\$ 126,111	4%	22,059	22,059	\$ 3,422,199	\$ 155	\$ 155
48	In-Home Education	Home	20,706	94%	20,706	94%	\$ 453,421	94%	1,290	6%	1,290	6%	\$ 27,069	6%	21,996	21,996	\$ 480,490	\$ 22	\$ 22
49																			
50	[1] Some households were served by both CBO/WMDVBE and non-CBO/WMDVBE contractors.																		
51	[2] For Duct testing and sealing, number represents 120 homes both tested and sealed in the amount of \$47,374. 23 of these homes were tested and sealed by CBO/WMDVBE contractors in the amount of \$8,202. The remaining 97 homes were tested and sealed																		
52	by non-CBO/WMDVBE contractors in the amount of \$39,172. 493 homes received duct testing only in the amount of \$42,899. All 484 homes receiving duct test only were served by COB/MWDBE contractors.																		
53	There are no energy savings associated with duct testing.																		

San Diego Gas Electric Company

	A	B	C	D	E
1	PY 2014 Energy Savings Assistance Program Annual Report ESAP Table 7 Expenditures Recorded by Cost Element				
2	ESA Program:	Labor	Non-Labor	Contractor	Total
3	Energy Efficiency				
4	Appliances	\$ -	\$ -	\$ 2,600,343	\$ 2,600,343
5	Domestic Hot Water	\$ -	\$ -	\$ 1,089,129	\$ 1,089,129
6	Enclosure	\$ -	\$ -	\$ 3,873,426	\$ 3,873,426
7	HVAC	\$ -	\$ -	\$ 1,983,580	\$ 1,983,580
8	Maintenance	\$ -	\$ -	\$ 282,282	\$ 282,282
9	Lighting	\$ -	\$ -	\$ 1,827,523	\$ 1,827,523
10	Miscellaneous	\$ -	\$ -	\$ 461,998	\$ 461,998
11	Customer Enrollment	\$ -	\$ -	\$ 3,422,199	\$ 3,422,199
12	In Home Education	\$ -	\$ -	\$ 480,490	\$ 480,490
13	Pilot	\$ -	\$ -		\$ -
14	Energy Efficiency TOTAL	\$ -	\$ -	\$ 16,020,971	\$ 16,020,971
15					
16	Training Center	\$ -	\$ -	\$ -	\$ -
17	Inspections	\$ 82,464	\$ 89	\$ -	\$ 82,553
18	Marketing and Outreach	\$ -	\$ 737,032	\$ -	\$ 737,032
19	Statewide Marketing Education and Outreach	\$ -	\$ -	\$ -	\$ -
20	Measurement and Evaluation Studies	\$ -	\$ 201,384	\$ -	\$ 201,384
21	Regulatory Compliance	\$ 217,414	\$ 25,184	\$ -	\$ 242,598

San Diego Gas Electric Company

	A	B	C	D	E	F	G	H	I
1	PY 2014 Energy Savings Assistance Program Annual Report ESAP Table 8 ESAP Homes Unwilling / Unable to Participate								
2	Reason Provided								
3	County	Customer/ Landlord Declined Program Measures or is Non- Responsive	Customer Unavailable - Scheduling Conflicts	Hazardous Environment (unsafe/unclean)	Insufficient feasible Measures	Ineligible Dwelling - Prior Program Participation	Household Income Exceeds Allowable Limits	Unable to Provide Required Documentation	Other
4	San Diego	805	-	-	-	6	435	8	10
5	Orange	14,933	230	-	34	15	8,667	1,023	240
6	Total	15,738	230	-	34	21	9,102	1,031	250

San Diego Gas Electric Company

	A	B	C	D	E	F	G
1	PY 2014 Energy Savings Assistance Program Annual Report ESAP Table 9 Life Cycle Bill Savings by Measure						
2	Measure Description		2014 Number Installed	Per Measure Electric Impact - Average (kWh)	Per Measure Gas Impact (Therms)	Effective Useful Life (EUL)	2014 Total Measure Life Cycle Bill Savings
3	Appliances						
4	High Efficiency Clothes Washer	Each	949	550.28	37.00	14	\$ 229,084
5	Refrigerators	Each	1,992	685.89		15	\$ 1,722,704
6	Microwaves [1]	Each	5,749	(18.28)	23.57	15	\$ 641,368
7	Domestic Hot Water						
8	Water Heater Blanket	Home	521	21.08	3.40	5	\$ 4,663
9	Low Flow Shower Head	Home	8,527	26.81	3.85	10	\$ 156,468
10	Water Heater Pipe Insulation	Home	358	10.32	0.86	5	\$ 942
11	Faucet Aerator	Home	18,696	10.98	2.05	5	\$ 100,535
12	Water Heater Repair/Replacement	Each	995	-	-	13	\$ -
13	Thermostatic Shower Valve	Each	5,805	399.00	13.60	10	\$ 469,096
14	Enclosure						
15	Air Sealing / Envelope	Home	10,175	49.54	4.27	5	\$ 236,856
16	Attic Insulation	Home	670	94.96	8.99	25	\$ 111,516
17	HVAC						
18	FAU Standing Pilot Light Conversion	Each	39	-	42.00	18	\$ 11,518
19	Furnace Repair/Replacement	Each	3,460	-	-	13	\$ -
20	Room A/C Replacement	Each	122	38.66		15	\$ 5,890
21	Central A/C Replacement	Each					
22	Heat Pump Replacement	Each					
23	Evaporative Coolers (Replacement)	Each					
24	Evaporative Coolers (Installation)	Each					
25	Duct Testing and Sealing	Home	613	-	-	25	\$ -
26	Maintenance						
27	Furnace Clean and Tune	Home	3,969	-	44.27	13	\$ 76,380
28	Central A/C Tune-up	Home	1	215.00		10	\$ 200
29	Evaporative Cooler Maintenance	Home					
30	Lighting						
31	Compact Fluorescent Lights (CFLs)	Each	125,932	17.53		9	\$ 1,887,557
32	Interior Hard wired CFL fixtures	Each	2,219	41.37		16	\$ 117,628
33	Exterior Hard wired CFL fixtures	Each	1,754	47.19		20	\$ 124,097
34	Torchiere	Each	6,922	191.00		9	\$ 1,130,548
35	Occupancy Sensor	Each					
36	LED Night Lights	Each	59,454	10.22		9	\$ 519,584
37	Miscellaneous						
38	Pool Pumps	Each					
39	Smart Power Strips	Each	13,200	75.00		20	\$ 1,484,287
40	Pilots						
41		Each					
42							
43	Total Homes Served By the Program						\$ 22,039
44	Life Cycle Bill Savings Per Home						\$ 410
45							

San Diego Gas Electric Company

	A	B	C
	PY 2014 Energy Savings Assistance Program Annual Report ESAP Table 10 Energy Rate Used for Bill Savings Calculations¹		
1			
2	Year	\$/kWh	\$/Therm
3	2014	0.11	0.57
4	2015	0.11	0.59
5	2016	0.12	0.60
6	2017	0.12	0.62
7	2018	0.12	0.64
8	2019	0.13	0.66
9	2020	0.13	0.68
10	2021	0.14	0.70
11	2022	0.14	0.72
12	2023	0.14	0.74
13	2024	0.15	0.77
14	2025	0.15	0.79
15	2026	0.16	0.81
16	2027	0.16	0.84
17	2028	0.17	0.86
18	2029	0.17	0.89
19	2030	0.18	0.91
20	2031	0.18	0.94
21	2032	0.19	0.97
22	2033	0.19	1.00
23	2034	0.20	1.03
24	2035	0.20	1.06
25	2036	0.21	1.09
26	2037	0.22	1.12
27	2038	0.22	1.16
28	[1] For 2014 average cost per kWh and Therm paid by participants. Cost is escalated 3% annually in next 24 years.		
29			

San Diego Gas Electric Company

	A	B	C	D	E
1	PY 2014 Energy Savings Assistance Program Annual Report ESAP Table 11 Bill Savings Calculations by Program Year				
2	Program Year	Program Costs	Program Lifecycle Bill Savings	Program Bill Savings/ Cost Ratio	Per Home Average Lifecycle Bill Savings
3	2011	\$ 20,950,509	\$ 11,372,235	0.54	\$ 504
4	2012	\$ 21,046,806	\$ 10,325,509	0.49	\$ 461
5	2013	\$ 17,874,649	\$ 7,897,313	0.44	\$ 450
6	2014	\$ 19,143,282	\$ 9,030,922	0.47	\$ 410
7					
8					
9					
10					

San Diego Gas Electric Company
PY 2014 Energy Savings Assistance Program Annual Report
ESAP Table 12
Fund Shifting

		Budget ¹			Expenditures			(Shift) or Carried Forward (Budget - Expenditures = Variance)			Among Categories within Program Year 1-3			Carry Forward from 2013			Carry Back from 2015								
											(1) Shift of Current Year Authorized			(2) Shift of Carry Forward			(3) Shift of Carry Back			Total Shifted Gas/ Electric ^{2,3}	% of Authorized Total	Fund Shifting Source 1. Current Year Authorized 2. Carried Forward 3. Carried Back	To/From Year	Fund Shift Description	Authorization
Date ⁶	Program Year 2014	Electric	Gas	Total Authorized	Electric	Gas	Total Expenditures	Variance			Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total						
								Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total						
	ESA Program: Energy Efficiency	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	ex. \$x,xxx	(\$x,xxx)	x%	Carried Forward	From 2008	From In-Home Energy Education	G-xxxx, D.xx-xx-xxx
	Appliance	\$ 3,626,319	\$ 1,306,214	\$ 4,932,533	\$ 1,959,297	\$ 641,046	\$ 2,600,343	\$ 1,667,022	\$ 665,168	\$ 2,332,190	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Domestic Hot Water	\$ 58,325	\$ 1,997,193	\$ 2,055,518	\$ 32,674	\$ 1,056,455	\$ 1,089,129	\$ 25,651	\$ 940,738	\$ 966,389	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Enclosure	\$ 1,850,540	\$ 2,739,307	\$ 4,589,847	\$ 1,665,573	\$ 2,207,853	\$ 3,873,426	\$ 184,967	\$ 531,454	\$ 716,421	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	HVAC	\$ 392,199	\$ 3,535,658	\$ 3,927,856	\$ 118,064	\$ 1,865,516	\$ 1,983,580	\$ 274,135	\$ 1,670,142	\$ 1,944,277	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Maintenance	\$ 4,464	\$ 566,414	\$ 570,879	\$ 125	\$ 282,157	\$ 282,282	\$ 4,330	\$ 284,257	\$ 288,597	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Lighting	\$ 2,775,286	\$ -	\$ 2,775,286	\$ 1,827,523	\$ -	\$ 1,827,523	\$ 947,763	\$ -	\$ 947,763	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Miscellaneous	\$ 484,540	\$ -	\$ 484,540	\$ 461,998	\$ -	\$ 461,998	\$ 22,542	\$ -	\$ 22,542	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
Dec. 2014	Customer Enrollment	\$ 1,692,820	\$ 1,692,820	\$ 3,385,641	\$ 1,711,100	\$ 1,711,100	\$ 3,422,199	\$ (18,279)	\$ (18,279)	\$ (36,559)	\$ -	\$ -	\$ -	\$ 18,279	\$ 18,279	\$ 36,558	\$ -	\$ -	\$ -	\$ 36,558	0%	1. 2. Carried Forward 3.	1. 2. From 2013 3.	1. 2. From 2013 & prior years carried forward unspent funds. 3.	1. 2. Authorized by D.08- 11-031 and as modified by D.10-10- 008. 3.
Dec. 2014	In Home Education	\$ 215,167	\$ 215,167	\$ 430,334	\$ 240,245	\$ 240,245	\$ 480,490	\$ (25,078)	\$ (25,078)	\$ (50,156)	\$ -	\$ -	\$ -	\$ 25,078	\$ 25,078	\$ 50,156	\$ -	\$ -	\$ -	\$ 50,156	0%	1. 2. Carried Forward 3.	1. 2. From 2013 3.	1. 2. From 2013 & prior years carried forward unspent funds. 3.	1. 2. Authorized by D.08- 11-031 and as modified by D.10-10- 008. 3.
	Pilot	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Energy Efficiency TOTAL	\$ 11,099,660	\$ 12,052,774	\$ 23,152,434	\$ 8,016,599	\$ 8,004,373	\$ 16,020,971	\$ 3,083,061	\$ 4,048,401	\$ 7,131,462	\$ -	\$ -	\$ -	\$ 43,357	\$ 43,357	\$ 86,714	\$ -	\$ -	\$ -	\$ 86,714					
	Training Center	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Inspections	\$ 49,603	\$ 49,603	\$ 99,206	\$ 41,277	\$ 41,276	\$ 82,553	\$ 8,326	\$ 8,327	\$ 16,653	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Marketing and Outreach	\$ 582,359	\$ 582,359	\$ 1,164,718	\$ 368,516	\$ 368,516	\$ 737,032	\$ 213,843	\$ 213,843	\$ 427,686	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Statewide ME&O ³	\$ -	\$ -	\$ -			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
May 2014	M&E Studies ^{3,4}	\$ 57,500	\$ 57,500	\$ 115,000	\$ 100,692	\$ 100,692	\$ 201,384	\$ (43,192)	\$ (43,192)	\$ (86,384)	\$ -	\$ -	\$ -	\$ 43,192	\$ 43,192	\$ 86,384	\$ -	\$ -	\$ -	\$ 86,384	0%	1. 2. Carried Forward 3.	1. 2. From 2013 3.	1. 2. From 2013 & prior years carried forward unspent funds. 3.	1. 2. Authorized by D.08- 11-031 and as modified by D.10-10- 008. 3.
	Regulatory Compliance ³	\$ 161,107	\$ 161,107	\$ 322,214	\$ 121,299	\$ 121,299	\$ 242,598	\$ 39,808	\$ 39,808	\$ 79,616	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	General Administration ³	\$ 1,003,209	\$ 1,003,209	\$ 2,006,417	\$ 925,859	\$ 925,858	\$ 1,851,717	\$ 77,350	\$ 77,351	\$ 154,700	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	CPUC Energy Division ³	\$ 22,500	\$ 22,500	\$ 45,000	\$ 3,513	\$ 3,513	\$ 7,027	\$ 18,987	\$ 18,987	\$ 37,973	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	TOTAL PROGRAM COSTS	\$ 12,975,937	\$ 13,929,051	\$ 26,904,989	\$ 9,577,755	\$ 9,565,527	\$ 19,143,282	\$ 3,398,182	\$ 4,363,524	\$ 7,761,706	\$ -	\$ -	\$ -	\$ 86,549	\$ 86,549	\$ 173,098	\$ -	\$ -	\$ -	\$ 173,098	0%				
	Carry Forward from Prior Years \$15,449,266 less (\$3,132,739 = \$499,405 Electric and \$2,633,333 Gas) approved carryforward fundshifting in D.14- 08-030 included in categories above as follows: Appliances (\$31,393 Elec / \$387,533 Gas); Domestic Hot Water (\$398 Elec/\$369,837 Gas); Enclosure (\$383,003 Elec / \$827,912 Gas); HVAC (\$971,441 Gas); Customer Enrollment (\$56,611 Elec / \$56,611 Gas); Inspections (\$20,000 Elec / \$20,000 Gas)	\$ 6,681,682	\$ 5,634,846	\$ 12,316,528				\$ 6,681,682	\$ 5,634,846	\$ 12,316,528				\$ 6,681,682	\$ 5,634,846	\$ 12,316,528									
	Carry Back from PY 2015 (\$0)	\$ -	\$ -	\$ -				\$ -	\$ -	\$ -															
	TOTAL PROGRAM INCLUDING CARRY FORWARD / CARRY BACK	\$ 19,657,619	\$ 19,563,897	\$ 39,221,517	\$ 9,577,755	\$ 9,565,527	\$ 19,143,282	\$ 10,079,864	\$ 9,998,370	\$ 20,078,234	\$ -	\$ -	\$ -	\$ 6,595,133	\$ 5,548,297	\$ 12,143,430	\$ -	\$ -	\$ -						

1) Per D.14-08-030 Authorized budget includes \$3,132,739 in fund shifting of carryover from prior years, and \$1,256,632 in budget augmentation in the following categories: Appliances, Domestic Hot Water, Enclosure, HVAC, Customer Enrollment, and Inspections. D.14-08-030 Authorized \$23,772,250 plus fund shift of carryforward \$3,132,739 = \$26,904,989. Original 2014 Authorized \$22,515,818 plus fund shift of carryforward \$3,132,739 + Budget augmentation \$1,256,632 = \$26,904,989.

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

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

4) Joint IOUs contracted four statewide studies (Load Impact Evaluation, Needs Assessment, Multi-Family Segment, Energy Education Assessment) over the 2012-2014 low income program cycle. SDG&E was the lead administrator of the Load Impact Evaluation study and the other IOUs were involved for this study. In 2014 SDG&E was invoiced by the other IOUs for the balance of the Needs Assessment, Multi-Family Segment, Energy Education Assessment studies.

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

6) This is the month in which the category was over budget. However, SDG&E did not shift any funds until year end 2014.

Total Carry Forward 2013 unspent funds	\$ 6,681,682	\$ 5,634,846	\$ 12,316,528
Total Shifted during 2014	\$ 86,549	\$ 86,549	\$ 173,098
Remaining Carryforward from 2013 after fund shift for 2014	\$ 6,595,133	\$ 5,548,297	\$ 12,143,430
Footnote 2 Totals not available for fund shift w/out prior written authorization	\$ 136,144	\$ 136,145	\$ 272,290
2014 Unspent Funds	\$ 3,348,587	\$ 4,313,928	\$ 7,662,516
Total Unspent Funds Carry forward into 2015	\$ 10,079,864	\$ 9,998,370	\$ 20,078,234

San Diego Gas Electric Company

	A	B
1	PY 2014 Energy Savings Assistance Program Annual Report ESAP Table 13 Categorical and Other Enrollment	
2		
3		
4		
5		
6	Type of Enrollment	Number of customers treated
7	Women, Infants, and Children Program (WIC)	977
8	Supplemental Security Income (SSI)	416
9	CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	515
10	CalWORKs/Temporary Assistance for Needy Families (TANF)	53
11	Tribal TANF	-
12	Medicaid/Medi-Cal for Families	1,053
13	Healthy Families A&B	23
14	National School Lunch Program (NSLP) - Free Lunch	192
15	Low-income Home Energy Assistance Program (LIHEAP)	806
16	Bureau of Indian Affairs General Assistance	-
17	Head Start Income Eligible - (Tribal Only)	-
18	Self Certification	11,367
19	Standard Enrollment	6,637
20	Total	22,039
21		
22		
23		

San Diego Gas Electric Company

PY 2014 Energy Savings Assistance Program Annual Report
ESAP Table 14
Leveraging & Integration

Coordination Type [1]	Partner	Brief Description of Effort	Relationship outside the IOU?	MOU Present?	Amount of Dollars Saved [2]	Amount of Energy Savings [3]	Other Measureable Benefits [3]	Enrollments Resulting from Leveraging Effort [4]	Methodology [5]	Meets all Criteria	If not, Explain
Leveraging	LIHEAP	SDG&E's outreach and assessment contractor entered into a MOU with the CSD agencies to enroll eligible LIHEAP bill assistance customers in the ESA Program.	Yes	Yes	None	185,411 kWh 14.12 kW 2,961 therms	N/A	896	N/A	N/A	N/A
Leveraging	SASH	Continued to work closely with Grid Alternatives to efficiently identify and serve any ESA Program eligible customers with all feasible measures.	Yes	Yes	None	1,144 kWh 0.09 kW 45 therms	N/A	3	N/A	N/A	N/A
Interdepartmental Integration	CARE	CARE/ESA Program combined message in all marketing material	No	N/A	None	N/A	N/A	N/A	No dollar impact. Integration effort was designed to increase awareness	N/A	N/A
Data Sharing	EUC MIDI Program	Lead Sharing between ESA Program and MIDI	No	N/A	None	272 kWh 0.01 kW 21 therms	N/A	12	N/A	Y	N/A
Data Sharing	CARE/Medical Baseline	Marketing to customers enrolled in CARE and/or Medical Baseline	No	N/A	None	60,669 kWh 5.48 kW 1,796 therms	N/A	178	No dollar impact. Effort provided targeted lead generation	N/A	N/A

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

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

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

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

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

Fields not applicable to specific efforts are marked "N/A"

San Diego Gas Electric Company

	A	B	C	D	E	F
1	PY 2014 Energy Savings Assistance Program Annual Report					
2	ESAP Table 15					
3	Lighting					
4						
5	ESA Program CFL Tracking Table					
6	<i>Instructions: Please identify the CFL bulbs used within your ESA program and fill in the remaining columns for each</i>					
7	Bulb Name / Identification	Bulb Description (wattage, lumens)	Bulb Cost (material)	Admin Cost (overhead, contractor fee, marketing, etc.)	Total Bulb Cost (material + admin) [1]	AB 1109 Compliant? [2]
8	CFL	14 Watt			6.90	Yes
9	CFL	19 Watt			6.90	Yes
10	CFL	20 Watt			6.90	Yes
11	CFL	23 Watt			6.90	Yes
12						
13						
14						
15						
16						
17	Year	Number of Homes Treated in ESA Program	Number of Homes Provided CFLs	Avg. # of CFL bulbs given per home	Est. total energy savings from installed CFLs [3]	
18	2009	20,927	17,653	6	1,796,496	
19	2010	21,593	17,016	7	1,796,176	
20	2011	22,575	17,246	6	1,697,568	
21	2012	22,415	17,046	6	1,772,269	
22	2013	17,568	11,639	6	1,502,883	
23	2014	22,039	20,895	6	2,207,495	
24						
25	¹ Bulb cost and admin cost were combined effective 2013.					
26						
27	² Compliant in regards to: 1) Do bulbs meet or exceed CEC energy efficiency standards for general purpose lighting?					
28	Do all models comply with Europe's RoHS standards on toxicity?					
29						
30	³ Energy savings used are from the Load Impact Evaluation of the 2009 Energy Savings Assistance Program.					

San Diego Gas Electric Company

	A	B	C	D	E	F	G	H
1	PY 2014 Energy Savings Assistance Program Annual Report ESAP Table 16 "Add Back" Measures							
2								
3								
4								
5								
6			Ratio of Benefits Over Costs					
7	Measure [1]	Climate Zone	Utility Cost Test	Modified Participant Test	Total Resource Cost Test	Quantity Installed	Budget Impact of "Add Back"	First Year Energy Bill Savings Impact
8	Room A/C Replacement, MF	10	0.13	0.09	0.11	56	\$58,332	\$248
9	Room A/C Replacement, MH	10	0.14	0.10	0.13	6	\$5,440	\$27
10	Room A/C Replacement, SF	10	0.15	0.10	0.13	60	\$54,291	\$266
11	Duct Testing and Sealing, elec, SF	7	0.00	0.00	0.00	9	\$999	\$0
12	Duct Testing and Sealing, elec, SF	10	0.00	0.00	0.00	14	\$2,459	\$0
13	Duct Testing and Sealing, gas, MH	7	0.00	0.00	0.00	7	\$4,200	\$0
14	Duct Testing and Sealing, gas, MH	10	0.00	0.00	0.00	10	\$6,000	\$0
15	Duct Testing and Sealing, gas, SF	7	0.00	0.00	0.00	279	\$37,935	\$0
16	Duct Testing and Sealing, gas, SF	10	0.00	0.00	0.00	294	\$38,680	\$0
17	Furnace Repair/Replacement, gas, MF	7	0.00	0.00	0.00	194	\$98,889	\$0
18	Furnace Repair/Replacement, gas, MF	10	0.00	0.00	0.00	148	\$75,441	\$0
19	Furnace Repair/Replacement, gas, MH	7	0.00	0.00	0.00	284	\$144,765	\$0
20	Furnace Repair/Replacement, gas, MH	10	0.00	0.00	0.00	279	\$142,216	\$0
21	Furnace Repair/Replacement, gas, MH	15	0.00	0.00	0.00	2	\$1,019	\$0
22	Furnace Repair/Replacement, gas, SF	7	0.00	0.00	0.00	1,464	\$746,252	\$0
23	Furnace Repair/Replacement, gas, SF	10	0.00	0.00	0.00	1,089	\$555,101	\$0
24	Water Heater Repair/Replacement, elec, MF	7	0.00	0.00	0.00	1	\$2	\$0
25	Water Heater Repair/Replacement, elec, MF	10	0.00	0.00	0.00	2	\$5	\$0
26	Water Heater Repair/Replacement, elec, SF	7	0.00	0.00	0.00	1	\$2	\$0
27	Water Heater Repair/Replacement, elec, SF	10	0.00	0.00	0.00	5	\$11	\$0
28	Water Heater Repair/Replacement, gas, MF	7	0.00	0.00	0.00	24	\$2,684	\$0
29	Water Heater Repair/Replacement, gas, MF	10	0.00	0.00	0.00	41	\$1,798	\$0
30	Water Heater Repair/Replacement, gas, MH	7	0.00	0.00	0.00	81	\$27,762	\$0
31	Water Heater Repair/Replacement, gas, MH	10	0.00	0.00	0.00	144	\$44,069	\$0
32	Water Heater Repair/Replacement, gas, MH	15	0.00	0.00	0.00	1	\$32	\$0
33	Water Heater Repair/Replacement, gas, SF	7	0.00	0.00	0.00	1,427	\$76,101	\$0
34	Water Heater Repair/Replacement, gas, SF	10	0.00	0.00	0.00	858	\$42,933	\$0
35								
36								
37	[1] Based on Appendix J.1 and J.2 in D.12-08-044 and Ordering Paragraphs 43, 47,and 50 of D.12-08-044.							
38								

San Diego Gas Electric Company

	A	B	C	D	E	F	G	H
1	PY 2014 CARE Annual Report							
2	CARE Table 1							
3	Overall Program Expenses							
4	Category	Overall Expenditures		Total	Authorized Budget	% of Budget Spent	Total Shifted ¹	Shifted to/from?
5		Electric	Gas					
6	Outreach	\$1,952,677	\$481,348	\$2,434,024	\$2,300,352	106%	Increased Third Party CARE Outreach activities to support improved program enrollment.	From IT Programming
7	Processing, Certification, Recertification	\$313,316	\$78,065	\$391,380	\$643,206	61%		
8	Post Enrollment Verification	\$161,597	\$40,214	\$201,812	\$403,200	50%		
9	IT Programming	\$508,686	\$125,791	\$634,476	\$1,230,082	52%		
10	Cool Centers	\$23,636	\$5,578	\$29,215	\$35,985	81%		
11	Pilots ²	\$93,690	\$23,310	\$117,000	\$108,000	108%	The CHANGES pilot invoice for December 2013 was not accrued and was charged in Jan 2014. CHANGES invoice for Dec. 2014 was accrued, causing one extra month billing In PY2014.	From IT Programming
12	Measurement & Evaluation	\$0	\$0	\$0	\$42,500	0%		
13	Regulatory Compliance	\$142,289	\$35,672	\$177,960	\$165,362	108%	Additional compliance support was needed to handle increased CPUC requirements incurred through new initiatives, such as High Usage Verification	From IT Programming
14	General Administration	\$423,332	\$105,111	\$528,442	\$518,406	102%	Additional administrative support needed to handle increased CPUC requirements incurred through new initiatives, such as High Usage Verification	From IT Programming
15	CPUC Energy Division	\$13,101	\$3,295	\$16,396	\$56,712	29%		
16								
17	TOTAL Program Costs	\$3,632,324	\$898,383	\$4,530,706	\$5,503,805	82%		
18								
19	CARE Rate Discount	\$52,156,007	\$11,741,061	\$63,897,068	\$83,614,933	76%		
20	Service Establishment Charge Discount	\$0	\$0	\$0	\$0	0%		
21								
22	TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	\$55,788,331	\$12,639,444	\$68,427,774	\$89,118,738	77%		
23								
24	¹ Explain fund shifting details							
25	² CHANGES Pilot							
26								
27								

San Diego Gas Electric Company

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	
1	PY 2014 CARE Annual Report																									
2	CARE Table 2																									
3	Enrollment, Recertification, Attrition, & Penetration																									
4		New Enrollment								Recertification				Attrition					Enrollment		Total CARE Participants	Estimated CARE Eligible	Penetration Rate % (W/X)			
5		Automatic Enrollment				Self-Certification (Income or Categorical)				Capitation	Total New Enrollment (E+I+J)	Scheduled	Non-Scheduled (Duplicates)	Automatic	Total Recertification (L+M+N)	No Response ⁵	Failed PEV	Failed Recertification	Other ⁴	Total Attrition (P+Q+R+S)				Gross (K+O)	Net Adjusted (K-T)	
6	Inter-Utility ¹	Intra-Utility ²	Leveraging ³	Combined (B+C+D)	Online	Paper	Phone	Combined (F+G+H)																		
7	January	1	232	5	238	1,498	1,773	249	3,520	671	4,429	3,471	959	5,078	9,508	3,529	325	49	3,750	7,653	13,937	-3,224	297,330	371,546	80%	
8	February	0	145	6	151	1,431	1,881	139	3,451	505	4,107	2,866	704	4,280	7,850	2,517	99	39	3,533	6,188	11,957	-2,081	295,249	371,546	79%	
9	March	0	5	0	5	1,384	1,947	109	3,440	611	4,056	2,695	1,680	4,493	8,868	4,012	70	46	3,058	7,186	12,924	-3,130	292,119	371,546	79%	
10	April	0	282	7	289	1,420	1,679	94	3,193	514	3,996	2,034	1,087	4,935	8,056	522	139	39	3,300	4,000	12,052	-4	292,115	371,803	79%	
11	May	119	199	8	326	1,403	2,641	83	4,127	556	5,009	2,575	1,341	5,347	9,263	1,272	225	30	3,164	4,691	14,272	318	292,433	371,803	79%	
12	June	0	136	2	138	1,500	1,843	52	3,395	678	4,211	2,434	1,672	2,822	6,928	1,552	264	25	4,817	6,658	11,139	-2,447	289,988	371,803	78%	
13	July	0	302	8	310	2,146	3,008	168	5,322	781	6,413	1,615	3,106	3,053	7,774	3,397	121	26	4,793	8,337	14,187	-1,924	288,062	372,310	77%	
14	August	150	357	2	509	2,100	1,914	670	4,684	516	5,709	1,252	1,385	5,542	8,179	1,809	103	19	2,381	4,312	13,888	1,397	289,459	372,310	78%	
15	September	0	208	1	209	2,578	1,454	784	4,816	471	5,496	2,676	2,337	5,495	10,508	1,194	115	57	5,218	6,584	16,004	-1,088	288,371	371,310	78%	
16	October	0	17	0	17	1,331	1,581	268	3,180	338	3,535	3,339	905	5,496	9,740	1,079	80	62	4,636	5,857	13,275	-2,322	286,049	368,229	78%	
17	November	0	494	12	506	2,301	2,242	850	5,393	535	6,434	3,238	2,701	4,209	10,148	3,395	538	64	1,904	5,901	16,582	533	286,582	368,229	78%	
18	December	79	435	5	519	1,610	2,255	960	4,825	466	5,810	3,787	2,329	3,396	9,512	3,938	578	58	8,887	13,461	15,322	-7,651	278,931	368,229	76%	
19	YTD Total	349	2,812	56	3,217	20,702	24,218	4,426	49,346	6,642	59,205	31,982	20,206	54,146	106,334	28,216	2,657	514	49,441	80,828	165,539	-21,623	278,931	368,229	76%	
20																										
21																										
22	¹ Enrollments via data sharing between the IOUs.																									
23	² Enrollments via data sharing between departments and/or programs within the utility.																									
24	³ Enrollments via data sharing with programs outside the IOU that serve low-income customers.																									
25	⁴ No response includes no response to both Recertification and Verification.																									
26	⁵ Includes customers who closed their accounts, requested to be removed, or were otherwise ineligible for the program.																									
27																										

San Diego Gas Electric Company

CARE Table 3A - Post-Enrollment Verification Results (Model) 2014

2014	Total CARE Households Enrolled	Households Requested to Verify ¹	% of CARE Enrolled Requested to Verify	CARE Households De-Enrolled (Due to no response)	CARE Households De-Enrolled (Verified as Ineligible) ¹	Total Households De-Enrolled ²	% De-enrolled through Post Enrollment Verification ³	% of Total CARE Households De-Enrolled
January	297,330	45	0.02%	21	9	30	66.67%	0.01%
February	295,249	0	0.00%	0	0	0	0.00%	0.00%
March	292,119	2,048	0.70%	927	361	1,288	62.89%	0.44%
April	292,115	2,615	0.90%	1,140	503	1,643	62.83%	0.56%
May	292,433	1,170	0.40%	545	202	747	63.85%	0.26%
June	289,986	1,224	0.42%	530	199	729	59.56%	0.25%
July	288,062	1,047	0.36%	431	208	639	61.03%	0.22%
August	289,459	1,482	0.51%	628	282	910	61.40%	0.31%
September	288,371	966	0.33%	382	185	567	58.70%	0.20%
October	286,049	2,225	0.78%	1,044	246	1,290	57.98%	0.45%
November	286,582	1,781	0.62%	876	176	1,052	59.07%	0.37%
December	278,931	2,303	0.83%	1,201	228	1,429	62.05%	0.51%
YTD Total	278,931	16,906	6.06%	7,725	2,599	10,324	61.07%	3.70%

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

² Verification results are tied to the month initiated and the verification process allows customers 90 days to respond to the verification request. Results may be pending due to the time permitted for a participant to respond. Includes customers verified as over income or who requested to be de-enrolled.

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

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

2014

2014	Total CARE Households Enrolled	Households Requested to Verify	% of CARE Enrolled Requested to Verify	CARE Households De-Enrolled (Due to no response)	CARE Households De-Enrolled (Verified as Ineligible) ¹	Total Households De-Enrolled ²	% De-enrolled through Post Enrollment Verification	% of Total CARE Households De-Enrolled
January	297,330	100	0.00%	85	11	96	96.00%	0.03%
February	295,249	100	0.00%	82	14	96	96.00%	0.03%
March	292,119	0	0.00%	0	0	0	0.00%	0.00%
April	292,115	90	0.00%	72	11	83	92.22%	0.03%
May	292,433	100	0.00%	84	9	93	93.00%	0.03%
June	289,986	76	0.03%	58	13	71	93.42%	0.02%
July	288,062	100	0.03%	80	12	92	92.00%	0.03%
August	289,459	100	0.03%	77	17	94	94.00%	0.03%
September	288,371	0	0.00%	0	0	0	0.00%	0.00%
October	286,049	12,631	4.42%	9,806	1,344	11,150	88.27%	3.90%
November	286,582	2,566	0.90%	2,082	217	2,299	89.59%	0.80%
December	278,931	87	0.03%	58	5	63	72.41%	0.02%
YTD Total	278,931	15,950	5.72%	12,484	1,653	14,137	88.63%	5.07%

¹ Includes customers who were verified as over income, requested to be removed, did not agree to participate in ESA, failed to respond to appointment requests, or missed multiple appointments.

² Total does not include closed accounts

San Diego Gas Electric Company

	A	B	C	D	E	F	G
1	PY 2014 CARE Annual Report CARE Table 4 CARE Self-Certification and Self-Recertification Applications						
2							
3							
4		Provided	Received	Approved	Denied	Pending/ Never Completed	Duplicates
5	Total	423,977	131,464	113,368	5,900	107	12,089
6	Percentage		100.00%	86.24%	4.49%	0.08%	9.20%
7	¹ Includes sub-metered customers. ² Includes number of applications 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.						
8							
9							
10							
11							
12							
13							

San Diego Gas Electric Company

	A	B	C	D	E	F	G	H	I	J
1	PY 2014 CARE Annual Report CARE Table 5 CARE Enrollment by County									
2										
3										
4	County	Estimated Eligible			Total Participants			Penetration Rate		
5		Urban	Rural¹	Total	Urban	Rural	Total	Urban	Rural	Total
6	Orange	19,509	0	19,509	11,262	0	11,262	58%	0%	58%
7	San Diego	340,677	8,043	348,720	261,749	5,920	267,669	77%	74%	77%
8	Total									
9	Total	360,186	8,043	368,229	273,011	5,920	278,931	76%	74%	76%
10	¹ Rural includes zip codes classified as such according to the Goldsmith modification that was developed to identify small towns and rural areas within large metropolitan counties.									
11										
12										
13										
14										

San Diego Gas Electric Company

	A	B	C	D	E	F	G	H
1	PY 2014 CARE Annual Report CARE Table 6 CARE Recertification Results							
2								
3								
4	2014	Total CARE Population	Participants Requested to Recertify ¹	% of Population Total	Participants Recertified ²	Participants Dropped ^{2, 3}	Recertification Rate % (E/C) ⁴	% of Total Population Dropped (F/B)
5	January	297,300	4,858	1.63%	2,801	1,266	57.66%	0.43%
6	February	295,249	3,449	1.17%	2,021	892	58.60%	0.30%
7	March	292,119	4,368	1.50%	2,829	951	64.77%	0.33%
8	April	292,115	3,684	1.26%	2,047	1,055	55.56%	0.36%
9	May	292,433	1,487	0.51%	826	415	55.55%	0.14%
10	June	289,986	960	0.33%	478	325	49.79%	0.11%
11	July	288,062	1,564	0.54%	708	592	45.27%	0.21%
12	August	289,459	7,589	2.62%	4,043	2,476	53.27%	0.86%
13	September	288,371	9,215	3.20%	5,115	3,033	55.51%	1.05%
14	October	286,049	5,013	1.75%	2,905	1,681	57.95%	0.59%
15	November	286,582	3,547	1.24%	2,012	1,309	56.72%	0.46%
16	December	278,931	3,738	1.34%	2,212	1,313	59.18%	0.47%
17	YTD Total	278,931	49,472	17.74%	27,997	15,308	56.59%	5.49%
18	¹ Participants recertified number does not include customers who passed the SDG&E's CARE eligible probability model. ² Recertification results are tied to the month initiated and the recertification process allows customers 90 days to respond to the recertification request. ³ Includes customers who did not respond or who requested to be de-enrolled. ⁴ Percentage of customers recertified compared to the total participants requested to recertify. Does not reflect accounts with closed or transferred							
19								
20								
21								
22								
23								
24								

San Diego Gas Electric Company

	A	B	C	D	E	F	G	H
1	PY 2014 CARE Annual Report CARE Table 7 CARE Capitation Contractors							
2								
3								
4	Contractor Name ¹	Contractor Type (Check one or more if applicable)				Enrollments²		
5		Private	CBO	WMDVBE	LIHEAP	Rural	Urban	Total
6	211 Phone Enrollment	0	X	0	0	0	5,535	5,535
7	African Alliance	0	X	0	0	0	70	70
8	American Red Cross	0	X	0	0	0	228	228
9	Catholic Charities	0	X	0	0	0	36	36
10	Children's Initiative	0	X	0	0	0	4	4
11	Chula Vista Community Collaborative	0	X	0	0	0	19	19
12	Community Resource Center	0	X	0	0	0	3	3
13	Crisis House	0	X	0	0	0	12	12
14	Hearts and Hands Together	0	X	0	0	0	35	35
15	Horn of Africa	0	X	0	0	0	2	2
16	Interfaith Community Services	0	X	0	0	0	2	2
17	La Masestra Family Clinic	0	X	0	0	0	24	24
18	MAAC Project	0	0	0	X	0	133	133
19	National Asian American Coalition	0	X	0	0	0	1	1
20	Neighborhood Health Care	0	X	0	0	0	21	21
21	Network of Myanmar American Association	0	X	0	0	0	0	0
22	North County Health Project	0	X	0	0	0	93	93
23	San Diego State University - WIC	0	X	0	0	0	279	279
24	Scripps Health - WIC	0	X	0	0	0	11	11
25	Servicentro San Clemente, Inc.	X	0	0	0	0	126	126
26	Vista Community Clinic	0	X	0	0	0	3	3
27	YMCA Youth	0	X	0	0	0	1	1
28	Total Enrollments and Expenditures³	\$302,270				0	6,638	6,638
29								
30	¹ All capitation contractors with current contracts are listed regardless of whether they have signed up customers or submitted invoices this year.							
31	² Enrollments reflect new enrollments only.							
32	³ Total Capitation Expenditures include 2013 enrollments paid in 2014.							

San Diego Gas Electric Company

	A	B	C	D	E	F	G	H
1	PY 2014 CARE Annual Report CARE Table 8 CARE Participants as of Month-End							
2								
3								
4	2014	Gas and Electric	Gas Only	Electric Only	Total	Eligible Households	Penetration Rate	% Change
5	January	199,438	N/A	97,892	297,330	371,546	80%	-4.0%
6	February	197,964	N/A	97,285	295,249	371,546	79%	-0.7%
7	March	196,135	N/A	95,984	292,119	371,546	79%	-1.1%
8	April	196,032	N/A	96,083	292,115	371,803	79%	0.0%
9	May	196,088	N/A	96,345	292,433	371,803	79%	0.1%
10	June	194,608	N/A	95,378	289,986	371,803	78%	-0.8%
11	July	193,096	N/A	94,966	288,062	372,310	77%	-0.7%
12	August	192,943	N/A	96,516	289,459	372,310	78%	0.5%
13	September	190,730	N/A	97,641	288,371	372,310	77%	-0.4%
14	October	187,117	N/A	98,932	286,049	368,229	78%	-0.8%
15	November	185,397	N/A	101,185	286,582	368,229	78%	0.2%
16	December	178,359	N/A	100,572	278,931	368,229	76%	-2.7%
17								
18								

San Diego Gas Electric Company

	A	B	C	D
1	PY 2014 CARE Annual Report CARE Table 9 CARE Average Monthly Usage & Bill			
2				
3				
4				
5	Average Monthly Gas / Electric Usage			
6	Residential Non-CARE vs. CARE Customers			
7	Customer	Gas Therms	Gas Therms	Total
8		Tier 1	Tier 2	
9	Non-CARE	18.2	4.2	22.5
10	CARE	17.9	2.5	20.4
11	Customer	Electric KWh	Electric KWh	Total
12		Tier 1	Tier 2 and Above	
13	Non-CARE	283	211	494
14	CARE	289	135	424
15				
16				
17	Average Monthly Gas / Electric Bill²			
18	Residential Non-CARE vs. CARE Customers¹			
19	(Dollars per Customer)			
20	Customer	Gas	Electric	
21	Non-CARE	\$30.09	\$107.49	
22	CARE	\$21.23	\$46.08	
23				
24				
25	¹ Excludes master-meter usage.			
26	² Average Monthly Gas/Electric Bill reflects residential Non-CARE (CARE) 2014 total billed revenues divided by the average number of Non-CARE (CARE) 2014 monthly bills.			
27				

San Diego Gas Electric Company

	A	B	C	D	E	F
1	PY 2014 CARE Annual Report					
2	CARE Table 10					
3	CARE Surcharge & Revenue					
4						
5	Electric					
6	CARE Surcharge and Revenue Collected by Customer Class					
7	Class	CARE Surcharge ¹	Monthly Bill	as Percent of Bill	Collected	Revenue Collected
8	Residential	\$1.51	\$98	1.50%	\$17,348,626	31.62%
9	Commercial	\$13.30	\$659	2.00%	\$23,216,727	42.31%
10	Agricultural	\$21.55	\$1,021	2.10%	\$1,008,821	1.84%
11	Large/Indust	\$1,637.50	\$45,040	3.60%	\$13,294,822	24.23%
12						
13						
14						
15	GAS					
16	CARE Surcharge and Revenue Collected by Customer Class					
17	Customer				Total CARE	Percentage of
18		Average Monthly		CARE Surcharge	Surcharge Revenue	CARE Surcharge
19	Class	CARE Surcharge*	Monthly Bill	as Percent of Bill	Collected	Revenue Collected
20	Residential	\$0.80	\$30	2.60%	\$5,971,299	47.18%
21	Commercial	\$14.08	\$284	5.00%	\$5,072,755	40.09%
22	Natural Gas Vehicle	\$1,026.14	\$9,271	11.10%	\$381,724	3.02%
23	Industrial	\$1,861.56	\$6,720	27.70%	\$1,228,632	9.71%
24						
25	¹ Excludes CARE customers					
26						

San Diego Gas Electric Company

	A	B	C	D	E	F
1	PY 2014 CARE Annual Report CARE Table 11 CARE Capitation Applications					
2						
3						
4	Entity	Total Received	Approved¹	Denied	Pending/ Never Completed	Duplicate
5	211 Phone Enrollment	9,140	7,586	254	0	1,300
6	African Alliance	114	99	2	0	13
7	American Red Cross	423	354	21	0	48
8	Catholic Charities	60	57	0	0	3
9	Children's Initiative	5	5	0	0	0
10	Chula Vista Community Collaborative	41	37	2	0	2
11	Community Resource Center	5	5	0	0	0
12	Crisis House	47	37	3	0	7
13	Hearts and Hands Together	151	130	10	0	11
14	Horn of Africa	22	19	1	0	2
15	Interfaith Community Services	5	4	0	0	1
16	La Maestra Family Clinic	70	63	2	0	5
17	MAAC Project	301	255	9	1	36
18	National Asian American Coalition	2	2	0	0	0
19	Neighborhood Health Care	49	41	0	0	8
20	Network of Myanmar American Association	0	0	0	0	0
21	North County Health Project	182	156	9	0	17
22	San Diego State University - WIC	549	457	28	0	64
23	Scripps Health - WIC	31	22	2	0	7
24	Servicentro San Clemente, Inc.	170	151	9	2	8
25	Vista Community Clinic	15	14	1	0	0
26	YMCA Youth	1	1	0	0	0
27	Total	11,383	9,495	353	3	1,532
28						
29						
30						
31						

¹ Includes new enrollments and recertification applications approved

San Diego Gas Electric Company

	A	B	C	D	E	F	G	
1	PY 2014 CARE Annual Report CARE Table 12 CARE Expansion Program							
2								
3								
4								
5	Participating Facilities by Month							
6	2014	Gas			Electric			
7		CARE Residential Facilities	CARE Commercial Facilities	Total Gas	CARE Residential Facilities	CARE Commercial Facilities	Total Electric	
8		January	275	144	419	485	203	688
9		February	277	144	421	487	203	690
10	March	293	144	437	502	203	705	
11	April	296	145	441	508	204	712	
12	May	299	146	445	521	208	729	
13	June	286	146	432	510	208	718	
14	July	289	146	435	513	208	721	
15	August	289	146	435	513	208	721	
16	September	289	146	435	518	208	726	
17	October	284	145	429	519	205	724	
18	November	284	145	429	519	205	724	
19	December	284	145	429	519	205	724	
20								
21								
22	Average Monthly Gas / Electric Usage ¹							
23	Customer	Gas	Electric					
24		Therms	KWh					
25	Residential Facilities	27	463					
26	Commercial Facilities	275	4,833					
27								
28								
29	CARE Expansion Self-Certification and Self-Recertification Applications							
30		Received	Approved	Denied	Pending/Never Completed	Duplicates		
31	Total	874	835	3	0	36		
32	Percentage		95.54%	0.34%	0.00%	4.12%		
33								
34								
35	¹ Excludes master meter usage.							

San Diego Gas Electric Company

	A	B	C	D	E	F	G	H	I	J
1	PY 2014 CARE Annual Report									
2	CARE Table 13									
3	CARE High Usage Verification Results									
4										
5	Stage 1 - IRS Documentation and ESA Agreement				Stage 2 - ESA Participation			Stage 3 - Usage Monitoring		
6	Households Requested to Verify	Removed (No Response)	Removed (Verified Ineligible) ¹	Income Verified and Referred to ESA	Failed and Removed ²	Ineligible ³	Completed	Removed ⁴	Appeals Denied	Appeals Approved
7	16,192	12,484	1,478	984	175	303	239	12	1	1
8										
9	¹ Includes customers who were verified as over income, requested to be removed, or did not agree to participate in ESA.									
10	² Includes customers who declined to participate in ESA, failed to respond to appointment requests, or missed multiple appointments.									
11	³ Includes customers who previously participated, did not meet the three-measure minimum, landlord refused, etc. These customers move directly to Stage 3.									
12	⁴ Customers removed for exceeding 600% of baseline in any monthly billing cycle.									

San Diego Gas Electric Company

	A	B
1	PY 2014 CARE Annual Report CARE Table 14 Categorical Enrollment	
2		
3		
4		
5	Type of Enrollment	Number of customers Enrolled ¹
6	Women, Infants, and Children Program (WIC)	6,788
7	Supplemental Security Income (SSI)	2,794
8	CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	9,151
9	CalWORKs/Temporary Assistance for Needy Families (TANF) ²	1,878
10	Tribal TANF ²	0
11	Medicaid/Medi-Cal	14,327
12	Healthy Families A&B	1,672
13	National School Lunch Program (NSLP) - Free Lunch	3,678
14	Low-income Home Energy Assistance Program (LIHEAP)	787
15	Bureau of Indian Affairs General Assistance	41
16	Head Start Income Eligible - (Tribal Only)	223
17	¹ Number of customers enrolled reflects categorical programs selected by customer. Customers may select more than one eligible program for a single account. ² CalWORKS and Tribal TANF are combined categorical programs with no distinction between the two programs.	
18		
19		