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)
And Related Matters.	Application 14-11-009 Application 14-11-010 Application 14-11-011

ANNUAL REPORT ACTIVITY OF SAN DIEGO GAS & ELECTRIC COMPANY (U 904 G) ON LOW INCOME ASSISTANCE PROGRAMS FOR 2015

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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 Utlities Commission's Energy Division with all the necessary information in analyzing the low-income programs.

Respectfully Submitted,

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May 01, 2015

SAN DIEGO GAS & ELECTRIC COMPANY

ANNUAL REPORT ACTIVITY
ON LOW INCOME ASSISTANCE PROGRAMS

Energy Savings Assistance Program
And
California Alternate Rate for Energy Program

2015 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 5
1.2. Energy Savings Assistance Program Overview 10
1.3. Marketing, Education, and Outreach 10
1.4. Energy Savings Assistance Program Customer Enrollment 13
1.5. Disability Enrollment Efforts 15
1.6. Leveraging Success, Including LIHEAP 19
1.7. Integration Success 22
1.8. Workforce Education & Training 25
1.9. Legislative Lighting Requirements Status 27
1.10. Studies 28
1.11 Pilots 32
1.12 "Add Back" Measures 33
1.13 Low Income Working Groups 34
1.14 Annual Public ESA Program and CARE Meeting 36

2 CARE EXECUTIVE SUMMARY 37

2.1. Participant Information 41
2.2. CARE Program Summary 46
2.3. CARE Program Costs 48
2.4. Outreach 51
2.5. Processing CARE Applications 66
2.6. Program Management 68
2.7. Pilots 68
2.8. Studies 69

3. CARE EXPANSION PROGRAM 69

3.1. Participant Information 69
3.2. Usage Information 70
3.3. Program Cost 70
3.4. Outreach 71
3.5 Program Management 73

4. FUND SHIFTING 73

5. COMMONLY USED ACRONYMS 75

6. APPENDIX A. SAMPLE COLLATERAL MATERIALS 77

7. APPENDIX B: 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) Program[1] 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 opportunity to

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[1] The Energy Savings Assistance Program was formerly known as the Low Income Energy Efficiency Program or "LIEE".
[2] D. 07-12-051 at p. 2.
[3] *Id.*

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

On March 28, 2014, Southern California Edison Company filed a Motion on behalf of itself and other interested parties, requesting an extension of time for the large investor-owned utilities to file their 2015-2017 Applications until January 30, 2015[4] and requesting a one-year bridge funding period.[5] The Motion stated that Bridge funding will afford the IOUs sufficient time to incorporate those changes in their portfolios without putting the continuity of the ESA Program at risk. It would also afford the Commission sufficient time to consider the Investor-Owned Utilities' (IOUs') January 30, 2015 filing, including intervenor comments, and issue a Final Decision with enough lead time for the IOUs to implement any program changes required by the Final Decision by January 1, 2016. In D. 14-08-030, the Commission granted the request for one-year bridge funding to minimize disruption to the ESA and CARE Programs and to allow administrative flexibility to meet any unforeseen program needs during the bridge period, subject to the Commission's adopted fund shifting rules. The IOUs were directed to treat 2015 as the fourth program year and continuation of the 2012-2014 program cycle for fund shifting purposes.[6]

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[4] Contingent on a Final Commission Decision on Phase II of the issues in A. 11-05-007, et. al. by no later than October 1, 2014.

[5] Southern California Edison Company's (U338-E) Motion For An Extension Of Time To File Energy Savings Assistance and California Alternate Rates for Energy Programs and Budgets Applications for the Next Program Cycle and for a 2015 Bridge Funding Period, filed on behalf of Pacific Gas and Electric Company (PG&E), Southern California Gas Company (SoCalGas), San Diego Gas & Electric Company (SDG&E), Natural Resources
Defense Council (NRDC), The Utility Reform Network (TURN), Office of Ratepayer Advocates, (ORA), Proteus Incorporated (Proteus), The East Los Angeles Community Union (TELACU), Energy Efficiency Council (EEC), Maravilla Foundation, and the Association of California Community and Energy Services (ACCES) (collectively Joint Parties)

[6] D. 14-08-030, Ordering Paragraph 3.

SDG&E filed its Application for the 2015-2017 program cycle on November 18, 2014. However, by the end of 2015, the Commission had not issued a final decision in the proceeding.

During 2015, SDG&E continued 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 2015 bridge funding period.

This report provides information on SDG&E's ESA Program accomplishments and expenditures for Program Year (PY) 2015. In 2015, the ESA Program treated 20,209 homes, or 99.5% of the 2015 goal. The program spent **$**17,355,596, representing 73% of its authorized 2015 budget. At year end, there was a total of $6,416,653 in unspent 2015 gas and electric ESA Program funds. In addition, SDG&E has $20,078,234 in unspent electric and gas funds from pre-2015 program years. The cumulative unspent electric and gas funds are $26,494,887, which represents both 2015 and prior program years' unspent funds. These unspent funds are comprised of $13,676,480 in electric carryover funds and $12,818,408 in gas carryover funds from 2015 and prior years. In Application (A.) 14-11-009, SDG&E proposed to utilize $2,737,198 in electric unspent funds to offset its 2016 ESA Program revenue requirement and $3,223,752 in electric unspent to offset its 2017 ESA Program revenue requirement.[7] If SDG&E's proposal is approved by the Commission in its final decision on its 2015-2017 Application, SDG&E plans to utilize any remaining unspent funds to supplement its authorized 2015-2017 ESA Program budget.

[7] Prepared Direct Testimony of Sandra Williams and Horace Tantum IV on Behalf of San Diego Gas & Electric Company's Energy Savings Assistance Program Plans and Budgets for Program Years 2015-2017 at pages 124-125.

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 - 2015**	**IOU strategy employed this program year**
1: Strengthen program outreach using segmentation analysis and social marketing tools.	• Implement energy education designed to help customers understand and change behaviors in ways that support ESA savings.	• 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.	• Launch integrated EE/ESA/DSM brand.	• 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. • Assigned Commissioner Ruling issued October 13, 2011 directed the IOUs to cease Engage 360 statewide branding efforts. • D.12-05-015, the Guidance

Implementation Plan and Timeline		
Strategies	**Term 2012 - 2015**	**IOU strategy employed this program year**
		Decision, directed the utilities to discontinue the use of the Engage 360 brand and to develop a strategy and budget for transitioning toward the use of "Energy Upgrade California" (EUC) as a statewide umbrella brand. It also directed the utilities to utilize unspent funds from the Engage 360 campaign toward expenditures for EUC ME&O, web portal maintenance, and limited augmentation of programs related to EUC during 2012. • There was no Commission activity on this strategy during 2015.
1.3: Improve program delivery	• 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.	• 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

Implementation Plan and Timeline		
Strategies	**Term 2012 - 2015**	**IOU strategy employed this program year**
		customers under both programs, providing customers with more measures and driving efficiencies in the programs.
1.4: Promote the growth of a trained Energy Savings Assistance Program workforce.	• 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.	• In December of 2014, SDG&E entered into a service agreement with La Cooperativa to develop training for its ESA Program assessors. La Cooperativa reviewed the other IOUs' current training programs for best practices. La Cooperativa submitted a first draft of training materials for review in 2016. Implementation of the new training is pending a Final Decision in the 2015-2017 Low Income Program Applications.

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 - 2015**	**IOU strategy employed this program year**
2.1: Increase collaboration and leveraging of other low-income programs and services	• Continue to expand partnerships with stakeholders and seek new opportunities for data sharing.	• Continued referring leads between the ESA Program and 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. • ESA Program continued to collaborate with the Multi-Family Energy Efficiency Rebate (MFEER) program to better

Implementation Plan and Timeline		
Strategies	**Term 2012 - 2015**	**IOU strategy employed this program year**
		serve the qualifying customers in multi-family units and ensure they receive all feasible measures from both programs without overlap. • 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.
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.	• 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.	• 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 who would also be participating in the Single-Family Affordable Solar Homes program (SASH). In 2015, Grid Alternatives provided SDG&E with 225 referrals, resulting in two ESA Program enrollments. 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

Implementation Plan and Timeline		
Strategies	**Term 2012 - 2015**	**IOU strategy employed this program year**
		solar technology.
2.3: Provide low income customers with measures that result in the most savings in the Energy Savings Assistance Program.	• Assess opportunities to incorporate new energy efficiency measures into the ESA program, e.g., plug-load reduction, new HVAC technology.	• The authorized list of ESA Program measures did not change in 2015. 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.
2.4: Increase delivery of efficiency programs by identifying segmented concentrations of customers.	• Evaluate approach and determine whether additional segments are needed.	• 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 250 grassroots, nonprofit and neighborhood centric

Implementation Plan and Timeline		
Strategies	**Term 2012 - 2015**	**IOU strategy employed this program year**
		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 14-08-030:

Program Summary			
	Authorized / Planning Assumptions	Actual	%
Budget	$ 23,772,250	$ 17,355,596	73.0%
Homes Treated	20,316	20,209	99.5%
kWh Saved	7,886,586	3,760,368	47.6%
kW Demand Reduced	697	438	62.8%
Therms Saved	366,432	259,237	70.7%
GHG Emissions Reduced (Tons)	6,481	3,585	55.3%

1.3. Marketing, Education, and Outreach

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

SDG&E continued its targeting efforts by integrating Athens Research[8] data with customer account data from its Residential Segmentation profiles. Using this information, SDG&E has distinct segments among residential customers based on various factors such as: demographics and home characteristics, household electricity

[8] See Compliance Filing Of Pacific Gas And Electric Company (U 39-M), On Behalf of Itself, Southern California Gas Company (U 904-G), San Diego Gas & Electric Company (U 902-M), and Southern California Edison Company (U 338-E), Regarding Annual Estimates of CARE Eligible Customers And Related Information, dated February 11, 2015.

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.

An example of this multi-touch, integrated approach is the 2015 ESA targeted marketing campaign in which SDG&E sent an email and/or direct mail postcard to approximately 15,300 CARE customers, encouraging them to save more through the ESA Program. SDG&E then provided a canvassing list from the direct mail list to its three ESA Program contractors, providing ESA Program penetration rates and PRIZM[9] code info for each zip code. See Appendix 1 for a sample of this creative.

SDG&E coordinated these tactics to help 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 enrollment 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

[9] PRIZM® is The Nielsen Company's lifestyle segmentation system that combines data such as demographic, consumer behavior, and geographic to help define 66 distinct consumer segments.

Network[10] 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 our Energy Solutions Partners to provide education and engagement opportunities at approximately 1,700 presentations and events throughout its service territory. 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 continued to utilize its Residential Segmentation data overlaid with the Athens Research Study. Using this information, SDG&E has 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;
- 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

[10] SDG&E's Energy Solutions Partner Networks consists of over 250 local, grassroots and community-based organizations.

- Affinity for new technologies and energy management tools.

To connect with the target audiences, SDG&E 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 widowed senior citizen, as well as multi-family resident, both of whom participated in both the CARE and ESA Programs and carried a comforting 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 2015.

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 2015.

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.

SDG&E has maintained records on ESA Program in its HEAT database since 2006. 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.[11] 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

[11] In Ordering Paragraph 46 of D. 08-11-031, the Commission authorized utilities to treat customers served prior to 2002 but stressed that IOU should first seek out new households that have not yet been treated.

insulation, furnace), SDG&E will re-qualify and serve that customer. This approach allows prior customers to receive services they are eligible for while keeping the program focused on new customers who have never received services. In 2015, 95 customers (or 0.5%) 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.[12]

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

SDG&E achieved 99.5% of its annual goal in 2015. SDG&E's annual goal for 2015 was to treat 20,316 homes; however SDG&E fell slightly short of the 2015 goal by treating 20,209 homes. Looking toward 2020, SDG&E has achieved 103% of its cumulative homes treated goal from program years 2009 through 2015. To assure SDG&E's achievement of the 2016 enrollment goal of 20,316, monthly Key Performance Indicators (KPIs) for numbers of ESA Program customers enrolled have been developed and implemented, providing the ability to monitor ESA Program contractor production throughout the year and assure that the Outreach & Assessment (O&A) contractors are

[12] D. 12-08-044, Ordering Paragraph 2.

keeping up with expected production benchmarks. This will help assure that production remains paced, and goals are achieved by year end.

1.5. Disability Enrollment Efforts

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

SDG&E's ESA Program disability enrollment penetration rate for 2015 was 10.3% and did not meet the program's 15% goal.[13] SDG&E's Marketing, Education, and Outreach (ME&O) communications are designed to specifically address the communication needs of its customers with disabilities. Customers with visual impairments are provided with large-font printed materials or information booklets in Braille. Customers with hearing impairments are provided videos in American Sign Language and/or closed-captioned videos. SDG&E also actively promotes the ESA Program with a variety of community-based organizations serving customers with special needs. 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.

1.5.2. 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 (CBOs)

[13] In OP 29 of D. 08-11-031, the Commission set a goal for the IOUs to increase disabled household enrollment so that customers with disabilities would represent 15% of the new ESA Program enrollments annually. OP 31 of the Decision specified how utilities would be allowed to count customers with disabilities. For example, IOUs are permitted to count customers who self-identify as being disabled, but are not permitted to ask a customer if they have a disability.

– which includes nonprofit organizations, hospitals and community clinics and county/city agencies that provide direct services to this customer segment -- 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

CBO partners work with SDG&E through SDG&E's Customer Assistance Collaborative, which meets on an annual basis and provides an opportunity for SDG&E to educate them on program changes/updates, as well as other energy related matters. SDG&E is also able to gain input and recommendations on what activities and materials are needed or working well. The annual meeting was held in the fall of 2015. Meeting participants included representatives from the following organizations:

- Able-Disabled Advocacy, Inc.
- Access to Independence
- ARC – San Diego
- The Braille Institute
- Deaf Community Services of San Diego
- Challenged Athletes Foundation
- Disability Help Center
- Disabled Services Advisory Council
- Mental Health Association
- National Alliance of Mental Illness

- Paralyzed Veterans of San Diego
- SD County Aging & Independence Services

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.

For customers with visual impairments, SDG&E has provided large-font printed collateral materials and provides 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 the 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 Council on Literacy
- 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 2015, SDG&E's ESA Program achieved an estimated 10% 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 Deaf Community Services (DCS). ASL interpreters also work alongside the Customer Solutions Outreach team to assist customers at outreach events as appropriate and/or requested.

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 192 new leads and 109 new enrollments for the ESA Program. CUI efforts, meanwhile, resulted in 874 new leads and 569 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 its Weatherization Assistance Program.

SDG&E met with one of CSD's local Low Income Home Energy Assistance Program (LIHEAP) agencies' Weatherization Assistance Program (WAP), Campesinos Unidos, in February and in March 2015 to fine tune the details of the leveraging process. In April, a Memorandum of Understanding between the CSD LIHEAP agencies and

SDG&E's primary Outreach & Assessment contractor began yielding very positive results. These combined efforts yielded 702 additional enrollments in 2015.

In response to the drought emergency in California, SDG&E has collaborated with San Diego County Water Authority (SDCWA) to help customers reduce their cold water use. SDG&E and SDCWA engaged in high level discussions regarding the possibility of using SDCWA funding to increase in-home education information for cold water conservation, and provide ESA Program customers with low-cost water saving measures such as shower timers, hose nozzles, and toilet leak detection kits. On July 1, 2015, SDG&E tested offering water conservation education and cold water measures to 100 customers. SDG&E will analyze the results of this effort to determine whether to offer these cold water measures more widely in 2016.

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, Single-Family Affordable Solar Homes program (SASH) participants can move forward with their solar installation at an accelerated pace. Grid Alternatives provided SDG&E with 225 referrals, resulting in two ESA Program enrollments in 2015.

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.

SDG&E has found that the 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?

Beginning in 2013, SDG&E worked with CSD on the development and implementation of a Solar Water Heating Pilot Program. 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 mailed letters to ESA Program participants and worked with the local LIHEAP agencies, CUI and MAAC to leverage customer enrollments where feasible. CSD concluded the pilot program in March 2015. During the remainder of 2015, CSD worked on evaluating the results of the Solar Water Heating Pilot. CSD issued a draft of the final report in March 2016 for comments but has not yet issued its final report.

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 SDG&E's joint ESA Program and CARE online customer enrollment process during the 3rd quarter of 2014. In 2015, the CARE and ESA Program teams worked to align customer income documentation requirements used to support program eligibility. The ultimate goal was to establish a central repository for income documents that can be utilized by either program. This work will continue in 2016.

In addition, with the implementation of the CARE High Usage Verification, the CARE and ESA Program teams worked closely together to ensure customer hand-offs between the two programs were efficient and timely since this was being handled through a manual process. Lead creation for CARE High Users was automated in July 2015, and the ESA Program's three enrollment contractors were educated on the need to enroll these referrals promptly. This allowed those customers who were deemed "CARE Certified-Verified" to enroll more quickly and begin reducing their energy usage.

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 2015, 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.

SDG&E is still working on the final steps to fully implement this effort and will assess its effectiveness once fully completed.

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 maintaining 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 conform 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.

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.

Throughout 2015, SDG&E continued to look for opportunities to integrate the Energy Efficiency Programs with the ESA Program. For example, SDG&E leveraged opportunities to integrate the ESA Program and energy efficiency program offerings including lighting solutions, rebates and water savings kits as potential solutions for customers who may have seen an increased energy bill as part of Rate Reform efforts, specifically the consolidation of tiers 3 and 4. By bundling solutions like the home upgrade offerings, customers would be likely to mitigate some, if not all, of their bill impacts. 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 1st quarter of 2015, SDG&E's Demand Response programs staff continued 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. The customer segment that was being targeted by the Demand Response Team was different than the low income customer segment targeted by the ESA Program.

SDG&E found that the integration effort with the Demand Response programs was not successful and it was discontinued.

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 2015, Grid Alternatives provided SDG&E with 225 referrals, resulting in two ESA Program enrollments.

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 2015, 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 2015, 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 "Contractor Sales Training," created to help improve interpersonal skills in dealing with customers. Another continuing education opportunity was created to help sharpen the gas safety skills for field members of SDG&E's ESA Program contractors who perform Natural Gas Appliance Testing (NGAT). This session was taught by one of the SDG&E Customer Service Field Technical Advisors. Thirty ESA Program contractor field and leadership members were in attendance.

In December of 2014, SDG&E entered into a service agreement with La Cooperativa to develop training for its ESA Program assessors. The proposed 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 ESA Contractor training. La Cooperativa has reviewed other IOUs current training in order to determine best practices, and SDG&E has received a draft course outline, course curriculum, and La Cooperativa's analysis of best practices garnered from visiting other IOU's training centers. Approval to commence Residential Outreach Specialist training is anticipated as part of SDG&E's 2015-2017 application which is pending Commission approval.

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

SDG&E's multi-cultural/multi-lingual outreach contractors, The Harris Group (THG) and FocusCom (FC), 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 Compact Fluorescent Lamps (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 ESA Program's 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.

Since minimal study activity occurred in 2015 because of delays in Commission authorization, this Section includes information on proposed studies and related activities conducted during 2015.

Four statewide studies were proposed for the 2015-2017 ESA Program cycle. Three of these were proposed in response to Commission direction provided in Decision (D.)14-08-030, which included: 1) A Low Income Needs Assessment Study (LINA), 2) an impact evaluation of the 2015 ESA Program; and 3) a phase II ESA energy education study. In addition to these three, the IOUs also proposed a fourth study, a non-energy benefits and equity criteria evaluation. To date the IOUs have not received a decision authorizing implementation of these proposed studies. However, Energy Division directed the IOUs to solicit proposals in 2015 for two of these studies that were considered very time-sensitive: the LINA study and the ESA Impact Evaluation. The LINA study is required by statute to be completed by December 2016 and therefore had to commence in 2015 in order to provide results by the mandated end date. The Impact Evaluation is also time sensitive because the resulting energy savings estimates are used as inputs to the applications for PY2018, and these estimates will be needed in early 2017 in order to prepare the applications.

Table 1.10.1 below lists the four studies proposed for 2015-2017 and provides dates for activities that occurred in 2015.

TABLE 1.10.1: 2015-2017 LOW INCOME PROGRAM STUDIES

Proposed Studies	RFP Released	Consultant	Managing Utility	Project Initiation Meeting	Public Informational Meetings	Final Report Due
Low Income Needs Assessment Study	7/22/2015	Evergreen Economics	SCE	11/23/2015	5/13/2015 1/28/2016	12/2016
ESA PY 2015 Impact Evaluation	11/16/2015	TBD	SCG	TBD	TBD	TBD
Phase II ESA Energy Education Study	TBD	TBD	TBD	TBD	TBD	TBD
Non-Energy Benefits and Equity Criteria Evaluation	TBD	TBD	TBD	TBD	TBD	TBD

Joint Utility[14] Low Income Needs Assessment Study

Pursuant to the AB 327 requirement for a triennial needs assessment study, Decision D.14-08-030 directed the IOUs to propose a Low Income Needs Assessment (LINA) Study to include several key topic areas. The Low Income Needs Assessment is directed and overseen by members of the participating IOUs and Energy Division (ED). SCE serves as study team[15] coordination lead and contract manager with the Energy Division serves as the overall lead on the project. An initial public workshop was initiated by SCE and conducted on behalf of the study team on May 13, 2015. The workshop included discussion of general topic areas included in D.14-08-030 and was

[14] The Joint Utilities are PG&E, Southern California Edison Company (SCE), Southern California Gas Company (SCG), and San Diego Gas and Electric Company (SDG&E).
[15] The study team includes a member of each of the participating IOUs and Energy Division.

intended to assist in developing the scope of work for the 2016 LINA. A Request for Proposals (RFP) was developed following the workshop. The RFP was released on July 22, 2015 through a competitive bidding process. The contract was awarded to Evergreen Economics in October and they began work in November 2015. The activities conducted during November and December of 2015 focused on developing the research plan. A Public Meeting to discuss the Research Plan was held on January 28, 2016.

The overall study objective for the LINA is to provide information on the needs of the low-income customers eligible for ESA and CARE. The 2016 LINA is the third in a series of such studies required by the Commission. The key topic areas to be examined in the 2016 LINA are: energy burden and insecurity, beneficial energy efficiency (and other) measures, unique customer needs and income documentation. The Final Report will be completed in December 2016.

Joint Utility 2015 ESA Program Impact Evaluation

The Joint Utility 2015 ESA Program Impact Evaluation is a statewide study that is being managed by SoCalGas.

A Request for Proposals (RFP) to perform the ESA Impact Evaluation was released on November 16, 2015, and was awarded in February 2016. The planned schedule for this study included a final report on 2015 Impacts in Q1 2017; however, due to the delayed decision authorizing funding for this study, work has not yet begun.

The primary objective of this evaluation is to estimate first-year electric and gas savings and coincident peak demand reduction attributable to the 2015 ESA program. The results will be used to quantify the 2015 program achievements, document the relative value of various measures in producing energy savings, produce savings

forecasts, and meet filing and reporting requirements (including informing the development of the 2018-2020 ESA Program Application).

The savings estimates used in the cost effectiveness analysis for the 2015 Annual Report are taken from the PY2013 ESA Impact Evaluation adopted in D.14-08-030. It should be noted that these estimates are generally lower than the estimates used in previous years.

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.

No final reports were completed in 2015. The proposed study budgets are included in Table 1.10.2.

TABLE 1.10.2: 2015-2017 PROPOSED STUDY BUDGETS

Study	Managing Utility	Budget Proposed[16]	SDG&E Budget[17]	% Expended
Low Income Needs Assessment Study	SCE	$500,000	$75,000	7%[18]
ESA PY 2011 Impact Evaluation	SCG	$550,000	$82,500	0
Phase II ESA Energy Education Study	TBD	$350,000	$52,500	0
Non-Energy Benefits and Equity Criteria Evaluation	TBD	$150,000	$22,500	0

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 for the ESA Program in 2015.

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 for the ESA Program in 2015.

[16] The budgets reflect IOU proposed budgets pending a 2015-17 Decision. Bridge funding is currently being used to pay for work completed pending the 2015-17 Decision.
[17] The statewide cost allocations for the studies are: SCE 30%, PG&E 30%, SDG&E 15%, and SCG 25%.
[18] This reflects what was spent during 2015 and reflects expenses against the total statewide budget (not SDG&E portion only).

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 ESA Program Table 16. During 2015, 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 D.14-08-030, the Commission adopted the Reports submitted by the three Working Groups.[19]

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

[19] Ordering Paragraph 37 of D.14-08-030.

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. Energy Division reconvened the CE Working Group in February 2015 to discuss the issue of a cost-effectiveness threshold as directed by D.14-08-030. On February 27, 2015 the CE Working Group submitted a progress report to the relevant service lists. The progress report stated that the Working Group would continue to meet to discuss the issue and provide recommendations for a threshold to the service list at a later date. On June 17, 2015 the Working Group issued a written report to the relevant service lists detailing the Group's recommendations. The Commission has not yet made a determination on the CE Working Group's June 17, 2015 report.

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 determined 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 - There was no activity for the Mid-Cycle Working Group during 2015.

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 filing of the CARE and ESA Program annual report, due each year on May 1, 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 Ordering Paragraph 5 of D.12-08-044, the Joint Utilities held this annual meeting on June 11, 2015 to present an overview of their 2014 ESA Program and CARE Program results. The meeting was hosted by Southern California Gas Company at its Energy Resource Center in Downey, California.

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 mandate[20] 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.[21] The CARE 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 Guidelines.[22] 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 for all customers to recertify their CARE eligibility through SDG&E's Interactive Voice Recognition system (IVR); and, 5) internet-based CARE enrollment and recertification.

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[20] 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.

[21] 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.

[22] D. 05-10-044.

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

In 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 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. The decision also directed utilities to provide an increased focus 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;[23] 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.

[23] Ordering Paragraph 46 of D. 12-08-044, the Commission suspended the annual advice letter requirement while it resolved outstanding issues related to categorical eligibility in this or a subsequent proceeding.

In January 2014, the California Legislature enacted Assembly Bill (AB) 327, which 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 instituted a Rulemaking (R.) 12-06-013 to address CARE Rate Reform requirements from AB 327. As part of the Rulemaking, SDG&E proposed to simplify its CARE rate structure by removing the discount from volumetric rates (with the exclusion of the exemption from DWR-BC, CSI and CARE charges) and to instead provide it as a line-item discount off a bill calculated at standard rates, beginning in 2015. SDG&E also proposed a glide path for restructuring CARE rates to set an effective CARE discount to meet the statutory requirements of AB 327 by 2020. SDG&E's proposed CARE revisions were approved in D. 15-07-001. D. 15-07-001 directed SDG&E to file a Tier 1 Advice Letter for approval of the 2015 rate change[24].

Beginning September 1, 2015, the rate subsidy in CARE volumetric electric tier rates were moved from rates to the line-item discount, increasing the line-item discount from its current 20% levels, resulting in CARE rates being equal to the Non-CARE rates excluding adjustments for CSI and DWR-BC, prior to the line-item discount and CARE surcharge exemption. This resulted in low-use CARE customers receiving a more equivalent discount when compared to high-use CARE customers. These CARE rate subsidies are reflected in the Total Rate Adjustment Component (TRAC) and recovered through Public Purpose Program (PPP) rates. With the move of the CARE rate subsidies from rates to a line-item discount, going forward the higher CARE line-item discount is now recovered directly through PPP rates. The discussion on CARE rate restructuring will continue in 2016 as part of Phase 3 of the July 2015 Rate Reform decision.

[24] Advice Letter 2783-E, Implementation Of San Diego Gas & Electric Company's 2015 Residential Rate Design Reform Pursuant To Decision 15-07-001 Effective September 1, 2015.

In D. 14-08-030, the Commission addressed Phase II issues outlined in D.12-08-044. It authorized 12-month bridge funding for 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 2015. At year-end 2015, there were 271,247 customers participating in the CARE Program for an overall penetration rate of 73%.

The Commission, in D. 14-08-030, also determined that it was reasonable to continue to fund the Community Help and Awareness of Natural Gas and Electricity Services (CHANGES) Pilot Program, from the CARE budget, pending further pilot review, during the bridge period and authorized continued funding for the CHANGES Pilot Program of $61,200 a month until December 31, 2015, which reflected a 2% cost of living increase over the authorized 2014 funding level.[25]

In D. 15-12-047 (Interim Decision on the Community Help and Awareness of Natural Gas and Electricity Service Pilot Program, the Ongoing Program, and Related Funding) the Commission made the following determinations regarding the continuation of the CHANGES program for the large Investor-Owned Utilities which included the following:

- Approved the CHANGES program as an ongoing statewide program, effective January 1, 2016;
- The ongoing program will provide outreach, education, and bill issue assistance on natural gas and electricity bills and services to limited English proficient

[25] D. 14-08-030, Ordering Paragraph 48.

customers through a statewide network of community based organizations (CBOs);

- The program will be managed by the Commission's Consumer Information and Information Division with technical assistance and input from the Energy Division;
- Until a long-term funding source can be established through the budgetary and/or legislative channels, the ongoing CHANGES program as a reimbursement from the CARE Program, through the end of the current 2015-2017 program cycle, and may be renewed by the Commission, as needed, into the next CARE cycle; and
- In the future, the funding for CHANGES will ideally come from the Commission's reimbursable budget because it will provide greater latitude to address a range of energy assistance needs experienced by California's low income population, the LEP population, and population with disabilities.

SDG&E filed its Application for the 2015-2017 program cycle on November 18, 2014. However, by the end of 2015, the Commission had not issued a final decision in the proceeding.

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		
PY 2015	CARE Customers	Percentage Change		PY 2015	CARE Customers	Percentage Change
Jan	278,832	-0.04%		Jan	181,588	1.81%
Feb	276,328	-0.90%		Feb	179,933	-0.91%
Mar	272,711	-1.31%		Mar	176,776	-1.75%

Apr	271,383	-0.49%		Apr	175,406	-0.77%
May	270,872	-0.19%		May	175,209	-0.11%
Jun	272,056	0.44%		Jun	175,476	0.15%
Jul	271,686	-0.14%		Jul	174,582	-0.51%
Aug	272,184	0.18%		Aug	174,803	0.13%
Sep	272,285	0.04%		Sep	174,705	-0.06%
Oct	272,059	-0.08%		Oct	174,665	-0.02%
Nov	271,966	-0.03%		Nov	175,010	0.20%
Dec	271,247	-0.26%		Dec	175,447	0.25%

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 IOUs used the joint utility methodology adopted by the Commission in D.01-03-028 for developing monthly penetration estimates in 2015.[26] This method entails annual estimation of eligibility for CARE, and ESA Programs, and other income-by-household size parameters at the small area (block group, census tract, ZIP+2, etc.) for each IOU territory and for the state as a whole.

The requirements for 2015 eligibility, corresponding to the current estimation, again used the January Health and Human Services (HHS) Poverty Guidelines [Federal Register /Vol. 80, No. 14 /Thursday, January 22, 2015 /Notices; p.3237], "bundling" one- and two-person households at the HHS-defined 200% FPG limit as required by AB 327.

Sources for the estimation includes the current HHS guidelines, current year small area vendor marginal distributions on household characteristics, Census 2010 SF3 data, Census American Community Survey 2009-2013 Public Use Microdata Sample (PUMS) data, utility meter and master meter household counts, Department of Finance Consumer

[26] 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).

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 factors to a new set of "technical eligibility counts" (for CARE these are metered and sub-metered occupied housing units) obtaining an estimate of income/demographic 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 2009, the method was augmented to better incorporate the impact of labor force changes (unemployment and other forms of job separation, as well as positive changes that were 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 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.

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 status (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 geographical levels.

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 2015.

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 2.1.1, 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 in Section 2.1.1 above. The methodology is based on estimating small area (block group) level household size by income and householder-age tabulations for the current year and 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:

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

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

Electric – 29.4%

Gas – 29.0%

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 2015, there were 39,207 electric residential sub-metered accounts and 30,462 gas sub-metered accounts in SDG&E's service territory. Utilizing the methodology described in Section 2.1.2.3 – 2.1.2.5 above, it is estimated that 57.2%

(or 22,456) of the electric residential sub-metered tenants and 54.3% (or 16,565) of the residential gas sub-metered tenants are eligible for CARE.

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

Electric – 15,319

Gas – 13,284

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

Electric – 68%

Gas – 80%

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 2015 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[27]
Outreach	$2,300,352	$2,543,793	111%
Proc., Certification and Verification	$643,206	$422,517	66%
Post Enrollment Verification	$403,200	$297,084	74%
Information Tech./Programming	$1,230,082	$1,074,088	87%
Pilots	$110,160	$119,160	108%
Measurement and Evaluation	$22,500	$0	0%
Regulatory Compliance	$165,362	$205,987	125%
General Administration	$518,406	$614,863	119%

[27] See CARE Table 1 attached to this report for details on fund shifts required to accommodate for budget exceedances.

CPUC Energy Division Staff	$56,712	$32,920	58%
Cooling Centers	35,985	35,891	100%
Total Expenses	**$5,485,965**	**$5,346,303**	**97%**
Subsidies and Benefits[28]	$83,614,933	$76,448,948	91%
Total Program Costs and Discounts	**$89,100,898**	**$81,795,251**	**92%**

In December 2015, SDG&E identified an error in CARE Table 2 of its monthly report which resulted in a correction in the number of new enrollments and recertifications reported from February 2015 – November 2015.[29] This resulted in an overpayment to CARE capitation contractors in the amount of $20,780. As part of its year-end reconciliation process, SDG&E made a manual correction in the table above and in CARE Table 1 of this 2015 Annual Report to reflect the corrected expenditures in the Outreach cost category. SDG&E has also made an adjustment to reimburse the CARE balancing account for the amount of the overpayment.

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

CARE Penetration			
Participants Enrolled	Eligible Participants	Penetration rate	Target Met?
271,247	370,088	73%	No

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

There was one CARE recertification complaint received during the month of October 2015. A customer was removed from the CARE Program for failure to respond to recertification notices. The customer claimed they did not receive any of SDGE's

[28] Represents the electric CARE discount which was 20% from January 1, 2015 to August 31, 2015 and the line-item discount which increased to 35.886% effective September 1, 2015 as a result of residential rate reform. (See SDG&E Advice Letter 2783-E.) The CARE gas line-item discount remained at 20% for the entire year.

[29] SDG&E's CARE Table 2 of its December Monthly Report reflects the corrected number of new enrollments and recertifications for the period of February – November 2015.

recertification letters. Ultimately, the customer provided the recertification form. Therefore, the CARE discount was reinstated and the customer's account was rebilled.

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 Electric Discount: $20.45

Average Monthly Gas Discount: $3.05

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

Electric Subsidy - $66,508,281

Gas Subsidy - $9,940,667

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 payments and any agency-related outreach support efforts are also included in this category.[30]

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.

[30] 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 – $9,277,403 over-collected

Gas CARE – $5,602,342 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.

In 2015, SDG&E launched a new testimonial campaign that featured actual customers who participated in both the CARE and ESA Programs. SDG&E used the new testimonials for mass media and targeted marketing, as well as continued to use ads featuring employees in ethnic media. Below is a summary of 2015 activities.

<u>Mass Media</u>

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

Print Campaigns

In-language print ads were developed for both rural and ethnic markets. Ethnic market campaigns targeted African American, Hispanic, Chinese, Vietnamese,

and Filipino communities. Using SDG&E customers and employees, the English and in-language ads talked about the importance of the programs using culturally relevant cues that resonated with the target audience. The ads ran in various ethnic and rural publications. Examples of the print ads can be found in Appendix 2.

Television

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

Digital

SDG&E used an integrated online strategy of increasing awareness for the programs and driving online submissions through used paid search, display ads and video ads. Overall, SDG&E ads were seen over 29 million times throughout the year (impressions) with over 191,000 customers clicking through to the CARE/ESA Program online application.

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 promoting the CARE

and ESA Programs were distributed in March and November through the monthly bill. Examples of the bill inserts can be found in Appendix 3.

Ethnic Marketing

SDG&E reached numerous ethnic segments 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 $269,079. Please see below for details.

CARE/ESA

2015 Ethnic Media Recap

Ethnic Print		
Audience	**Readership**	**Total Spent**
Spanish	5,076,075	$65,078
Chinese	2,552,000	$14,440
Vietnamese	712,800	$10,800
Filipino	1,500,000	$15,250
African American	2,162,000	$19,311
	12,002,875	**$124,879**

Ethnic Television		
Audience	**Impressions**	**Total Spent**
Spanish	8,127,639	$144,200
		$144,200

Total 2015 Ethnic Spend	**$269,079**

Direct Marketing

Direct marketing allows SDG&E to connect with individual customers through targeted tactics. In 2015, SDG&E's direct marketing tactics included direct and electronic mail campaigns, automated voice messaging (AVM) and live-call campaigns, bill inserts, and door-to-door efforts.

Email Campaigns

Campaigns were leveraged with the ESA Program and contained 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 46%, 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.

Direct Mail Campaigns

SDG&E used direct mail to geographically target audience segments using Athens Research and SDG&E Segmentation to identify areas with mid-high propensity for program participation... SDG&E conducted seven direct mail campaigns in 2015. The direct mail postcard included the customer's account number and encouraged recipients to call SDG&E's CARE Interactive Voice Response (IVR) number to enroll by phone. Approximately 6,650 customers enrolled through this direct mail postcard out of the 192,000 customers that were sent the mailer, representing a 3.5% overall response rate.

Automated Voice Messaging (AVM) Campaigns

SDG&E used the AVM campaign tactic to renew CARE customers, offering the option of recertification by phone. This additional renewal option occurred before the customer's automatically scheduled renewal letter, thus reducing the number of renewals sent by mail. Approximately 21,000 customers chose this option.

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 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 2015, door-to-door efforts resulted in 14,282 completed applications and contributed over 8,266 new CARE enrollments.

Community Outreach & Engagement

Community outreach is a key component in educating the general public about SDG&E programs like the CARE program, 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 assistance programs. In 2015, SDG&E worked closely with 20 capitation agencies in order to enroll customers in CARE and other low income programs. In 2015, CARE Partners contributed approximately 3,913 enrollments.

Energy Solutions Partner Network

SDG&E continues to work with an established network of more than 250 nonprofit and community-based organizations, collectively called the Energy Solutions Partner Network. This network helps coordinate enhanced outreach efforts, including customized messaging, social media posts, special events, and promotions. Largely grassroots, multicultural, and neighborhood centric, these organizations are diverse and provide direct services to populations including seniors, special needs/disabled, low income and young families. In 2015, over 2,000 activities were coordinated through this partner network to promote the CARE and ESA Programs. Of these activities, CARE and ESA Programs were promoted in nearly 370 social media messages – Facebook, Twitter and Instagram -- by SDG&E's Energy Solutions Partner Network.

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 2015, SDG&E promoted CARE and other customer assistance solutions at over approximately 1,700 presentations and events.

Integration Efforts

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

2015, integration efforts included SDG&E's interactive voice response (IVR) system, Energy Service Specialists (ESS), branch offices, field collectors, collection calls, and informational brochures.

Customer Contact Center

SDG&E's Customer Contact Center assists thousands of customers with a variety of energy inquiries. While waiting to speak with an 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 2015, approximately 4,000 customers enrolled in CARE after receiving information about the program through SDG&E's Customer Contact Center.

Branch Offices

SDG&E's Customer Assistance team and the company's bill payment locations, including its 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 2015, branch office locations contributed over 5,000 CARE 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 about CARE, FERA, and the ESA Program and other assistance programs.

Informational Brochures

Brochures, featuring other energy-saving solutions, continue to include information on the customer assistance programs, including CARE, FERA, and the ESA Program. In 2015, SDG&E created a new summer preparedness guide to help customers prepare for higher bills due to higher energy use during the hotter months. The pocket-sized card was distributed during outreach presentations and community events and included information on general energy efficiency programs, conservation, CARE and the ESA Program. An example of the card can be found in Appendix 4.

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

SDG&E continues to find 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. SDG&E's outreach strategy is to connect to customers through general awareness and education, direct touch

and through community engagement. SDG&E believes that tactics in all three areas are necessary in reaching out to low income and hard-to-reach populations.

This combined approach means the intended audience has the opportunity to learn about the offer through a combination of ways before they respond, and therefore, it would be challenging to measure the effectiveness of each tactic/effort. The following illustrates how this combined strategy is implemented:

- A customer, Mr. Smith, sees SDG&E's CARE and ESA Program testimonial TV ad which generates an interest to find out more about these programs.
- Later that week, Mr. Smith attends a community event and talks to an SDG&E Energy Solutions Advisor about wanting to be more energy efficient, but not being able to afford it. The Advisor discusses the CARE and ESA Program with the customer who takes home brochures and interest from, so that the customer can read more about it and determine if his family is eligible.
- The next day, a door-to-door agent knocks on Mr. Smith's door and the agent helps him complete the application successfully.

All five customer touches were needed to successfully enroll this customer, making it difficult to project what channel should be tied to the enrollment.

Instead, cost effectiveness for these tactics are measured on the number of impressions or appearances in which the general population had the opportunity to learn about and engage in this program, as well as based on the number of leads and new enrollments each year.

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 a larger population of CARE-eligible customers. Leveraging the trust and goodwill this partner has established in the community has also proven to be beneficial. 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 2015, 2-1-1 San Diego fielded over 29,300 calls for utility assistance. Out of these, 3,938 calls were for the CARE Program and 2,495 for the ESA Program. 2-1-1 was able to convert these calls to 2,879 new CARE Program enrollments and 488 ESA Program enrollments.

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 improve, 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.[31]

Hardest to Reach & Unwilling

SDG&E has persistently worked to reach and enroll customers through a variety of marketing, education and outreach campaigns. 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 relevant program information for their shared services territory in Southern Orange County. SDG&E conducts a data match of all CARE customers in the shared service territory. If a customer is enrolled in the CARE program at SoCalGas and not at SDG&E, they will then automatically be enrolled in CARE through this data sharing

[31] San Diego County unemployment rate dropped from 5.2% in December 2014 to 4.5% in December of 2015

process. The reverse is done for SDG&E CARE customers. During 2015, SDG&E enrolled approximately 100 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.[32] In 2015, 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. The customer is then prompted to submit enrollment information for CARE or FERA, or 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 2015, SDG&E enrolled 20,689 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 extracts customer data from the ESA Program database for those customers who have indicated an interest in CARE and were determined eligible for participation based on income

[32] D. 11-05-020, Ordering Paragraph 1.

documentation provided as part of qualifying for the ESA Program. SDG&E also leveraged information received from customers applying online for the ESA Program. SDG&E enrolled over 4,000 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 (HEAP). SDG&E's agreement with 2-1-1[33] 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 2015, 2-1-1 San Diego handled 29,300 utility-related calls and referred 16,585 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.

In February 2015, SDG&E implemented enhancements to its CARE system database that created system automated application review and processing. The former process for online enrollment created an application which was submitted for further review by a CARE processor. The new process automated the review step and sends qualified enrollments directly to the billing system without needing additional processor review prior to enrollment. In 2015, 52% of all qualified new CARE enrollments and 33% of all qualified recertifications were processed automatically.

[33] 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 finds that collaboration with third party contractors is a necessary component in successfully reaching and enrolling multilingual and harder-to-reach customers. The Harris Group (THG) and FocusCom, SDG&E's multi-cultural/multi-lingual contractors, canvass the high density areas of the community where there may be large populations of CARE-eligible customers. These contractors leverage efforts to complete recertification with eligible customers. In 2015, targeted outreach efforts resulted in 12,002 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 2015, the partnership with 2-1-1 San Diego leveraged customers calling for utility bill

assistance to help recertify 1,526 customers in the CARE Program. By leveraging contracts with third-party contractors for new CARE enrollments, SDG&E is able to recertify customers successfully in a cost-effective manner.

SDG&E believes 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 mass media, 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 and/or that the customer may experience multiple tactics prior to actually completing recertification as detailed in Section 2.4.2. This is especially true for mass media tactics like television, print and online advertisements. In 2015, SDG&E's online advertising for example garnered over 29 million impressions (the number of times an SDG&E ad was seen by an online user) while ethnic print advertising had a readership of over 12 million and ethnic television garnered over 8 million impressions. All mass media channels encouraged customers to call SDG&E's toll free number or visit SDG&E's online application. It is hard to determine how many impressions it took for the over 30,000 customers who enrolled through the toll free and online application process. However, industry

experts have stated that it may take between 7-13 touches before a consumer takes action and responds to a tactic.[34]

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 a 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 completed full implementation of the HUV process in 2015. The upgrade allowed CARE, HEAT and CISCO to interface for purposes of tracking High Usage customers (400% - 600% or more of baseline usage).

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

[34] Accenture, Actionable Insights for the New Energy Consumer, 2012

Services Pilot Program[35] (CHANGES) through the CARE Program budget for the remainder of the 2012-2014 program cycle, or until alternate or complementary funding can be put into place, whichever is sooner. In D.14-08-030, the Commission approved continued funding for the CHANGE program through 2015, pending further review of the program pilot.

During 2015, SDG&E provided monthly reporting of CHANGES program activity, as directed in D.12-08-44.[36] SDG&E also participated in 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 2015.

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.

Facility Type	Electric	Gas

[35] 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.
[36] CHANGES program activity is reported monthly in CARE tables 10 and 11 of the CARE Program Monthly Report.

Commercial	6,904	4,283
Residential	1,844	1,042

3.2. Usage Information

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

Commodity	Residential	Commercial
Gas	27	263
Electric	452	7,266

3.3. Program Cost

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

Expanded CARE program costs totaled $6,326. These costs are associated with application processing. Costs for Program Management and Outreach are insignificant and are included in 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 - $77.60

Residential Facility Electric Discount - $339.80

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

Commercial Facility Gas Discount - $450.81

Commercial Facility Electric Discount - $3,223.14

3.4. Outreach

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

3.4.2. 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 Community Based Organizations. 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.

3.4.3. Discuss each of the following:

3.4.4. Discuss each of the following:

3.4.4.1. 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.

3.4.4.2. 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.

3.4.4.3. 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.

3.4.5. 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.

In 2016, SDG&E plans to identify enhancements that will result in a more cost effective delivery of the Expanded CARE Program. These enhancements may include a review of the Expanded CARE forms, customer letters and increased marketing & outreach activities in an effort to increase qualified facilities' enrollment.

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

During 2015, 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 and D.14-08-030.

<u>Miscellaneous</u>

SDG&E's Miscellaneous subcategory exceeded its authorized electric budget by 9%. In accordance with the fund shifting rules, SDG&E shifted $42, 274 from unspent electric funds carried forward from 2014 and prior years. The Miscellaneous subcategory consists of the Smart Power Strip measure offered in the ESA Program.

<u>In Home Education</u>

At 2015 year-end, SDG&E's In-Home Education expenses exceeded authorized budget by approximately 6% ($12,220 in gas and $12,220 in electric). Part of the reason for this overage is that SDG&E provided a cost of living increase in its fee paid to its outreach contractors for educating eligible and qualified ESA Program participants. Although SDG&E expected that this increase could have resulted in excess expenditure, monthly monitoring of actual results did not show that budget would be exceeded until December.

SDG&E plans to file a Motion in May 2016 to request to shift funds into the 2015 In-Home Education subcategory. SDG&E will make this request in accordance with Commission directive in Section b.(3)ii. of Ordering Paragraph 85 in D.10-10-008 to obtain the Administrative Law Judge's approval to shift funds into or out of the Education subcategory.

See ESA Program Table 12 which provides a detailed accounting of the fund shifting activity that occurred during 2015.

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

During 2015, SDG&E shifted CARE funds in accordance with the rules set forth in D. 06-12-038 (OP16), D.08-11-031, as modified by D.10-10-008, and reaffirmed in D.12-08-044 and D. 14-08-030, which granted utilities authority to shift funds between CARE administrative categories so as to promote the efficient and effective implementation of the CARE program. SDG&E expenditures in Outreach, General Administration, Pilots and Regulatory Compliance exceeded authorized budget amounts. SDG&E leveraged excess funds in the following three categories: 1) Processing, Recertification, Recertification; 2) Post Enrollment Verification; and 3) IT Programming.

CARE Program Table 1 provides the detailed accounting of the fund shifting activity that occurred during 2015.

SDG&E's 2015 bridge funding budget is based on the authorized funding level for 2014 which was originally authorized in D. 12-08-044 and extended in D. 14-08-030.

4.1.2. 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

During 2015, there was no ESA Program or CARE fund shifting activity 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 and D. 14-08-030.

5. COMMONLY USED ACRONYMS

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

OP	Ordering Paragraph
PCT	Programmable Communicating Thermostat
PEV	Post Enrollment Verification
PFM	Petition for Modification
PG&E	Pacific Gas & Electric Company
PPP	Public Purpose Program
PY	Program Year
SCE	Southern California Edison
SDG&E	San Diego Gas & Electric Company
SoCalGas	Southern California Gas Company
TDD	Telecommunications Device for the Deaf
TRC	Total Resource Cost Test
UC	Utility Costs
SSI	Supplemental Security Income
SSD	Supplemental Security Disability
SSP	Social Security Pension

6. APPENDIX A. SAMPLE COLLATERAL MATERIALS

ESA PROGRAM

1. Targeted Marketing Campaign

CARE

2. Print Ads
3. Email Campaign
4. Bill Insert
5. Summer Prep Pocket Card

Appendix A. 1. – Sample ESA Targeted Marketing

Appendix A. 1. (con't) – Sample ESA Targeted Marketing

Customer Name: Account Number:

Since you've already qualified to receive a discount on your SDG&E® bill, you may also be eligible for no-cost energy-efficient upgrades to your home.

These upgrades can help make your home more comfortable and help you save on your monthly energy bill.

With the Energy Savings Assistance Program, our authorized contractors will come to your home and may provide, at no cost:

- New energy-efficient lighting
- Repair or replacement of doors and windows
- Microwaves, refrigerators and high-efficiency clothes washers*
- Insulation, weatherstripping and caulking to lower heating and cooling costs

You can schedule an appointment by calling 1-866-597-0597 or visit ***sdge.com/esap***.

* Existing appliances must meet age requirements to qualify for replacement.

Energy Savings Assistance 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. Energy improvements completed under this program are made by third-party providers contracted by SDG&E. SDG&E is not responsible for any goods and services selected by customers.

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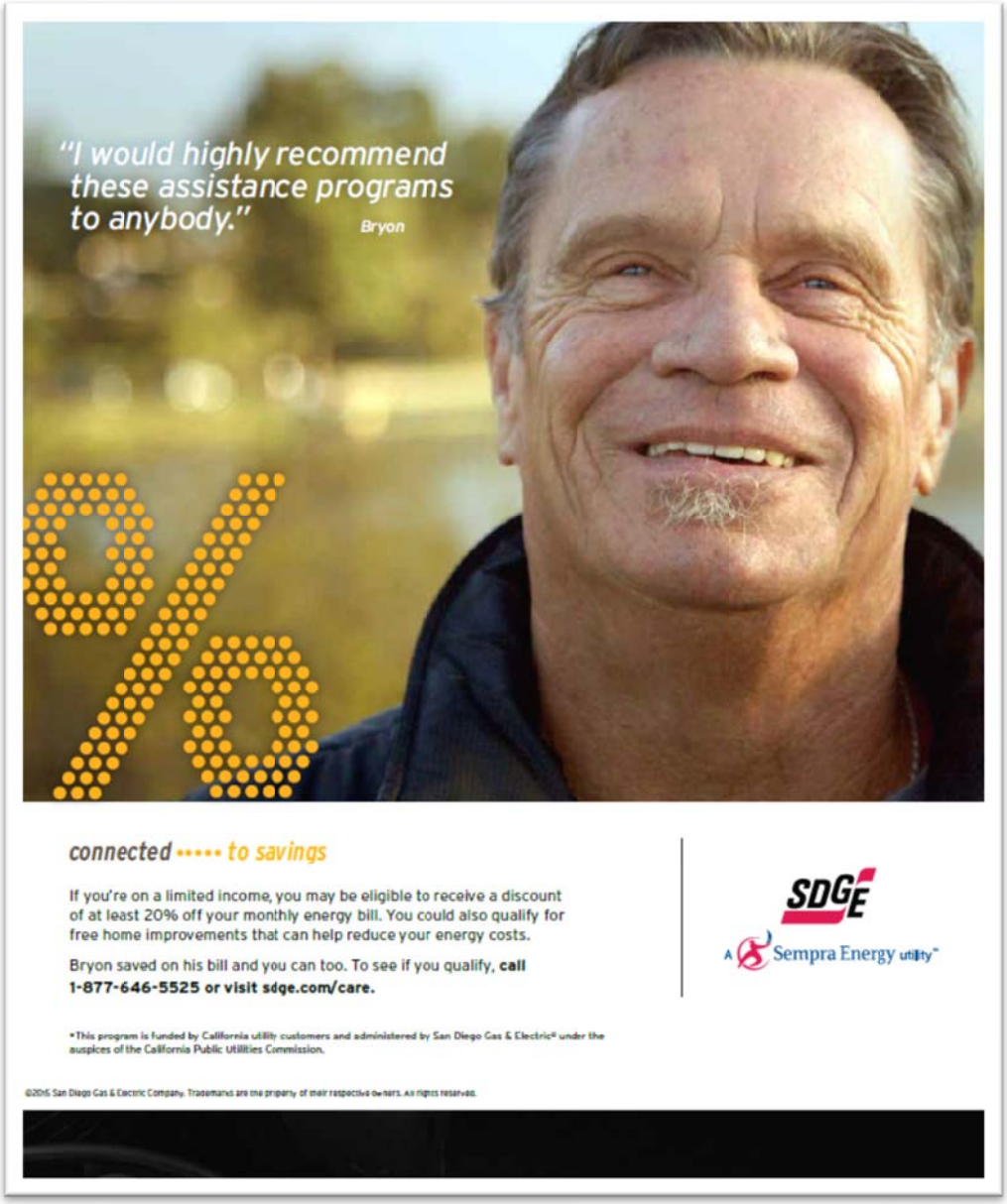
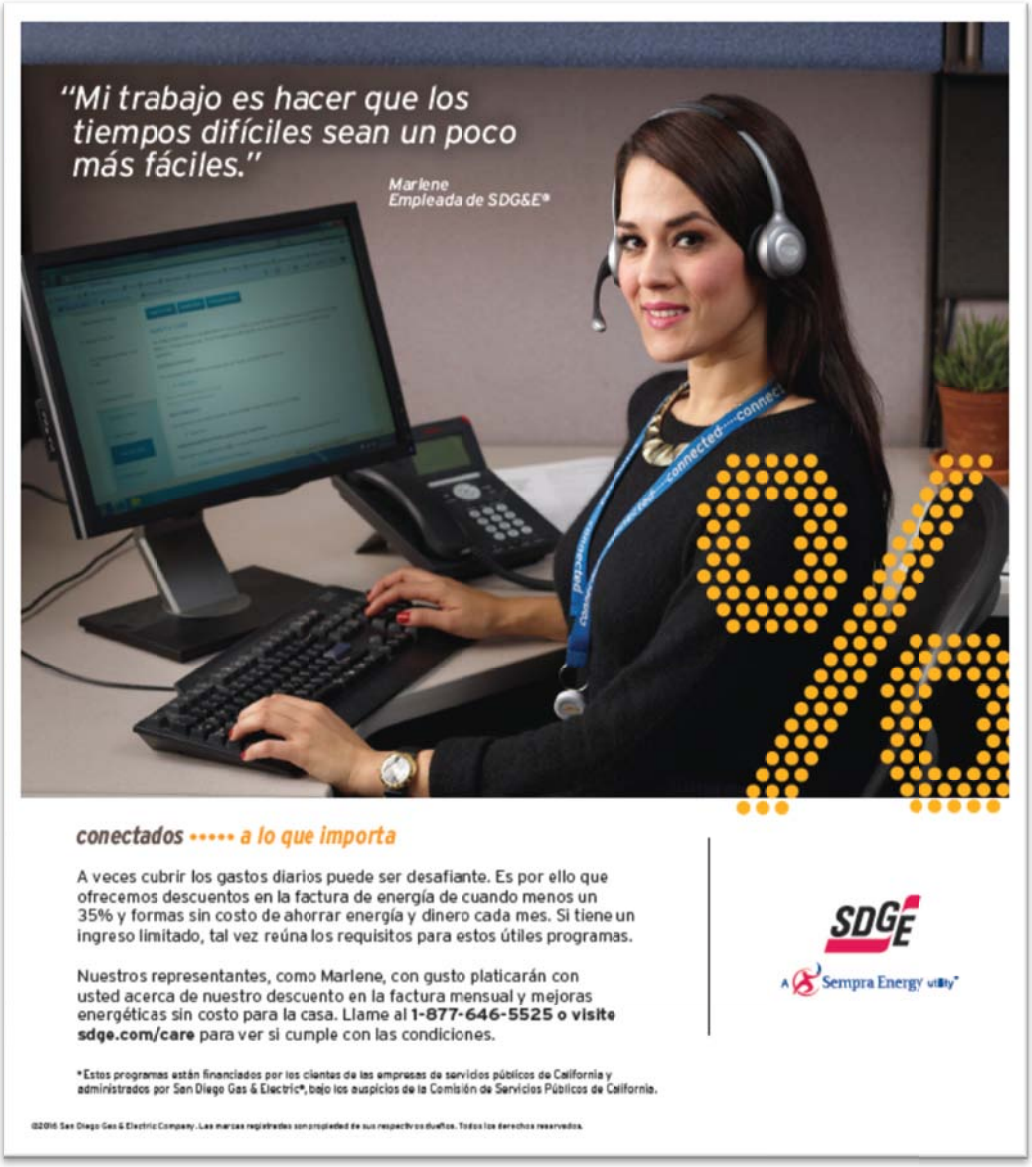
S1540064 1015 7M

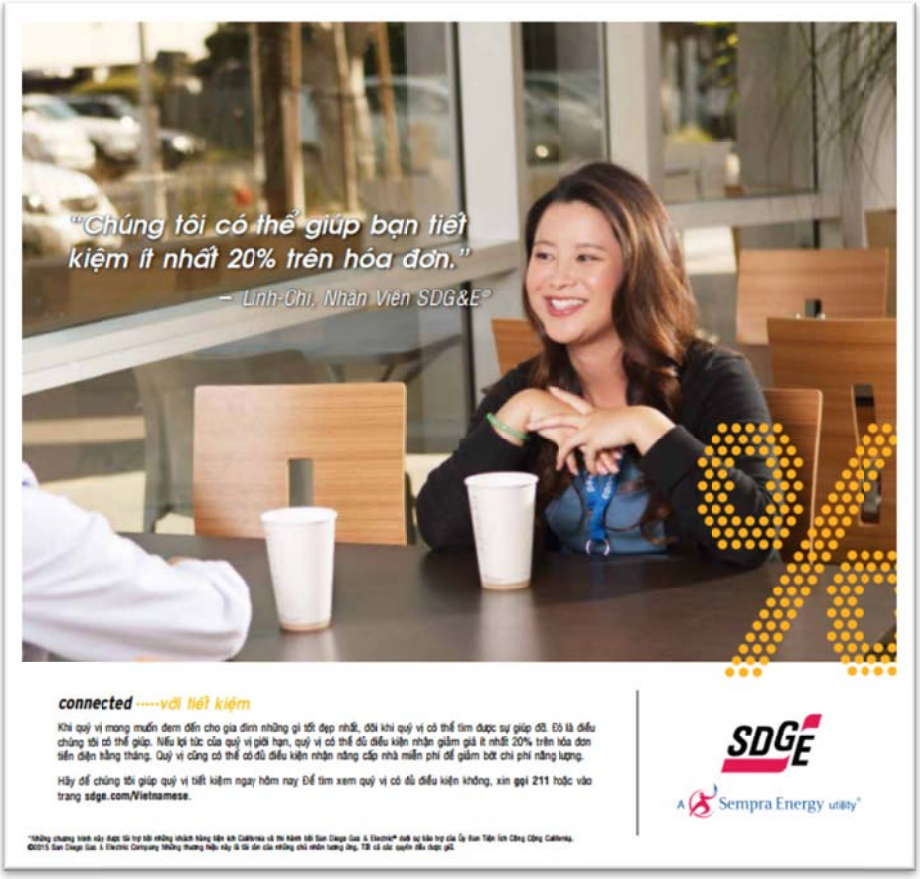
Appendix A. 2 – Sample CARE/ESA Print Ads (English and In-Language)



Appendix A. 2. (con't) – Sample CARE/ESA Print Ads (English and In-Language)



Appendix A. 2. (con't) – Sample CARE/ESA Print Ads (English and In-Language)



Appendix A. 4 – Sample Bill Insert (Promotional and Mandatory)

You may qualify for home upgrades and a monthly bill discount

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

Toni from La Mesa qualified and received approximately **$1,000** worth of home improvements which included weather stripping, lighting, faucet aerators and a new door. Additionally, she also qualified to receive at least a **35% discount** on her monthly bill.

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

SDGE

A Sempra Energy utility®

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

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

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

Appendix A. 4. (con't) – Sample Bill Insert (Promotional and Mandatory)

"Tal vez reúna los requisitos para mejoras en la casa y un descuento mensual en la factura"

¿Tiene un ingreso limitado o recientemente se quedó sin trabajo? Si es así, tal vez reúna los requisitos para recibir gratis mejoras eficientes en energía para el hogar,* un descuento en la factura de energía, o ambas cosas.

Toni de La Mesa reunió los requisitos y recibió aproximadamente **$1,000** en mejoras para el hogar, entre las que se incluyeron tiras para aislar, iluminación, aireadores para llaves de agua y una puerta nueva. Además, también cumplió con las condiciones para recibir cuando menos un **35% de descuento** en la factura mensual.

Para ver si reúne los requisitos, visítenos en *sdge.com/assistance*

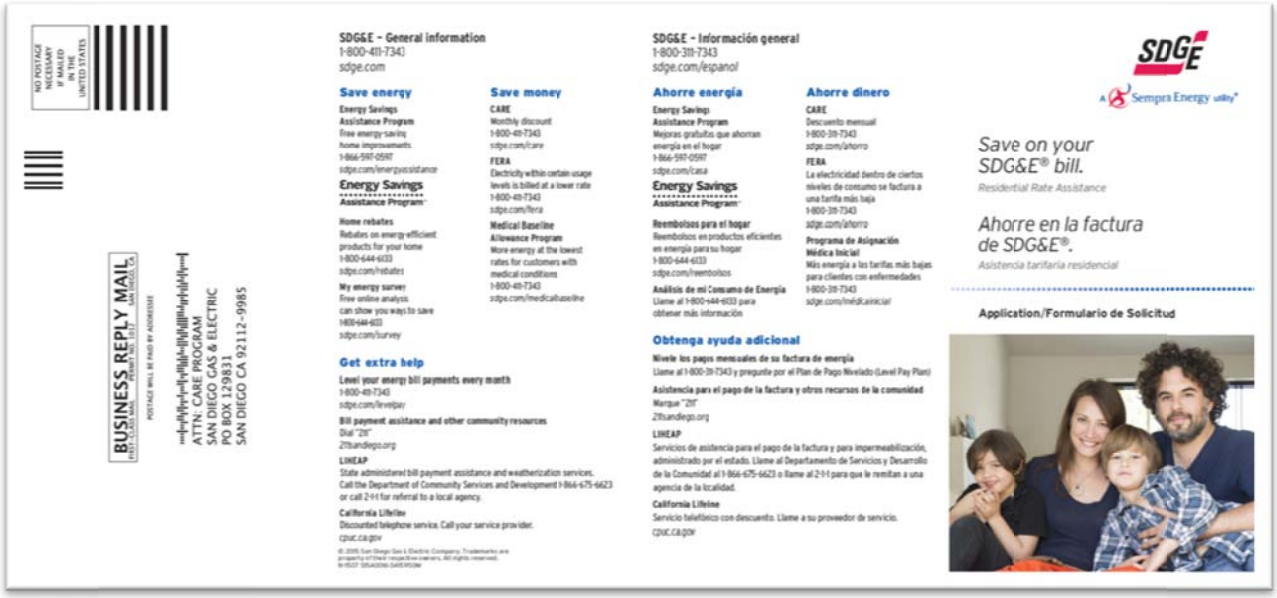
SDGE

A Sempra Energy utility®

*Siempre y cuando la residencia no haya sido beneficiada previamente por el programa.

Los aparatos domésticos existentes deben cumplir con los requisitos de antigüedad para que tenga derecho a que los reemplacen. Tal vez se requiera un copago de los propietarios que sean dueños de los aparatos y paguen la factura de luz y gas del inquilino. Estos programas están financiados por los clientes de las empresas de servicios públicos, y administrados por San Diego Gas & Electric®, bajo los auspicios de la Comisión de Servicios Públicos de California. SDG&E no hace ninguna representación en cuanto a la seguridad, confiabilidad o eficiencia de los bienes y servicios seleccionados. SDG&E no extiende ningún tipo de garantía, implícita o explícita, como por ejemplo garantía de comerciabilidad o idoneidad para ningún propósito, uso o aplicación en particular de los

Appendix A. 4. (con't) – Sample Bill Insert (Promotional and Mandatory)



NO POSTAGE NECESSARY IF MAILED IN THE UNITED STATES

BUSINESS REPLY MAIL
FIRST-CLASS MAIL PERMIT NO. 1517 SAN DIEGO, CA
POSTAGE WILL BE PAID BY ADDRESSEE

ATTN: CARE PROGRAM
SAN DIEGO GAS & ELECTRIC
PO BOX 129831
SAN DIEGO CA 92112-9985

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

Save energy

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

Energy Savings Assistance Program

Home rebates
Rebates on energy-efficient products for your home
1-800-644-6133
sdge.com/rebates

My energy survey
Free online analysis can show you ways to save
1-800-644-6133
sdge.com/survey

Save money

CARE
Monthly discount
1-800-411-7343
sdge.com/care

FERA
Electricity within certain usage levels is billed at a lower rate
1-800-411-7343
sdge.com/fera

Medical Baseline Allowance Program
More energy at the lowest rates for customers with medical conditions
1-800-411-7343
sdge.com/medicalbaseline

Get extra help

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

Bill payment assistance and other community resources
Dial "211"
211sandiego.org

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

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

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

Ahorre energía

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

Energy Savings Assistance Program

Reembolsos para el hogar
Reembolsos en productos eficientes en energía para su hogar
1-800-644-6133
sdge.com/reembolsos

Análisis de mi Consumo de Energía
Llame al 1-800-444-6133 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

Programa de Asignación Médica Inicial
Más energía a las tarifas más bajas para clientes con enfermedades
1-800-311-7343
sdge.com/médicainicial

Obtenga ayuda adicional

Nivele los pagos mensuales de su factura de energía
Llame 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"
211sandiego.org

LIHEAP
Servicios de asistencia para el pago de la factura y para impermeabilización, administrado 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.

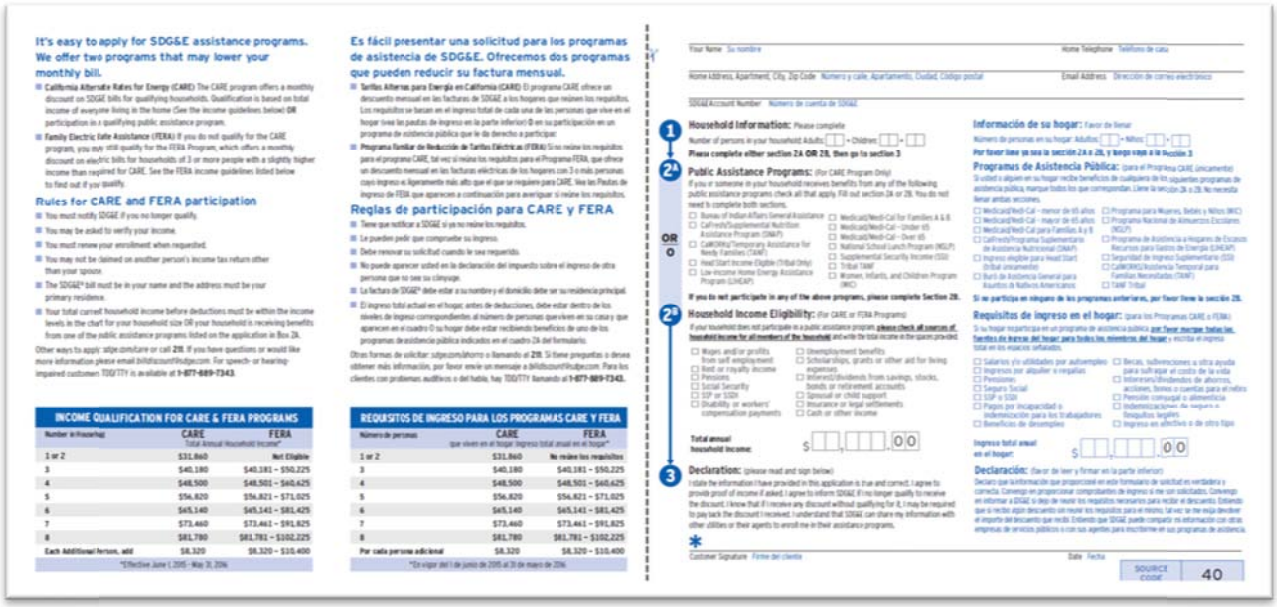
California Lifeline
Servicio telefónico con descuento. Llame a su proveedor de servicio.
cpuc.ca.gov

SDGE
A Sempra Energy utility

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 SDGE 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 listed below to find out if you qualify.

Rules for CARE and FERA participation

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

Other ways to apply: sdge.com/care or call **211**. If you have questions or would like more information please email billdiscount@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
	Total Annual Household Income	
1 or 2	$31,860	Not Eligible
3	$40,180	$40,181 – $50,225
4	$48,500	$48,501 – $60,625
5	$56,820	$56,821 – $71,025
6	$65,140	$65,141 – $81,425
7	$73,460	$73,461 – $91,825
8	$81,780	$81,781 – $102,225
Each Additional Person, add	$8,320	$8,320 – $10,400

*Effective June 1, 2015 – May 31, 2016

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

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

Reglas de participación para CARE y FERA

- Tiene que notificar a SDGE si ya no reúne los requisitos.
- Le pueden pedir que comprueba su ingreso.
- Debe renovar su solicitud cuando le sea requerido.
- No puede aparecer usted en la declaración del impuesto sobre el ingreso de otra persona que no sea su cónyuge.
- La factura de SDGE® debe estar a su nombre y el domicilio debe ser su residencia principal.
- El ingreso total actual en el hogar, antes de deducciones, debe estar dentro de los niveles de ingreso correspondientes al número de personas que viven en su casa y que aparecen en el cuadro O su hogar debe estar recibiendo beneficios de uno de los programas de asistencia pública indicados en el cuadro 2A del formulario.

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

REQUISITOS DE INGRESO PARA LOS PROGRAMAS CARE Y FERA		
Número de personas	CARE	FERA
	(que viven en el hogar) Ingreso total anual en el hogar*	
1 or 2	$31,860	No reúne los requisitos
3	$40,180	$40,181 – $50,225
4	$48,500	$48,501 – $60,625
5	$56,820	$56,821 – $71,025
6	$65,140	$65,141 – $81,425
7	$73,460	$73,461 – $91,825
8	$81,780	$81,781 – $102,225
Por cada persona adicional	$8,320	$8,320 – $10,400

*En vigor del 1 de junio de 2015 al 31 de mayo de 2016

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 either section 2A OR 2B, then go to section 3

OR o

2A **Public Assistance Programs:** (For CARE Program Only)
If you or someone in your household receives benefits from any of the following public assistance programs check all that apply. Fill out section 2A or 2B. You do not need to complete both sections.
☐ Bureau of Indian Affairs General Assistance
☐ CalFresh/Supplemental Nutrition Assistance Program (SNAP)
☐ CalWORKs/Temporary Assistance for Needy Families (TANF)
☐ Head Start Income Eligible (Tribal Only)
☐ Low-Income Home Energy Assistance Program (LIHEAP)
☐ Medicaid/Medi-Cal for Families A & B
☐ Medicaid/Medi-Cal - Under 65
☐ Medicaid/Medi-Cal - Over 65
☐ National School Lunch Program (NSLP)
☐ Supplemental Security Income (SSI)
☐ Tribal TANF
☐ Women, Infants, and Children Program (WIC)
If you do not participate in any of the above programs, please complete Section 2B.

2B **Household Income Eligibility:** (For CARE or FERA Programs)
If your household does not participate in a public assistance program **please check all sources of household income for all members of the household** and write the total income in the spaces provided
☐ Wages and/or profits from self-employment
☐ Rent or royalty income
☐ Pensions
☐ Social Security
☐ SSP or SSDI
☐ Disability or workers' compensation payments
☐ Unemployment benefits
☐ Scholarships, grants or other aid for living expenses
☐ Interest/Dividends from savings, stocks, bonds or retirement accounts
☐ Spousal or child support
☐ Insurance or legal settlements
☐ Cash or other income
Total annual household income: $ ☐,☐☐☐.00

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 SDGE if I no longer qualify to receive the discount. I know that if I receive any discount without qualifying for it, I may be required to pay back the discount I received. I understand that SDGE can share my information with other Utilities or their agents to enroll me in their assistance programs.
*
Customer Signature Firme del cliente — Date Fecha

Información de su hogar: Favor de llenar
Número de personas en su hogar: Adultos ☐ + Niños ☐ = ☐
Por favor llene ya sea la sección 2A o 2B, y luego vaya a la Sección 3

Programas de Asistencia Pública: (para el Programa CARE únicamente)
Si usted o alguien en su hogar recibe beneficios de cualquiera de los siguientes programas de asistencia pública, marque todos los que correspondan. Llene la sección 2A o 2B. No necesita llenar ambas secciones.
☐ Medicaid/Medi-Cal – menor de 65 años
☐ Medicaid/Medi-Cal – mayor de 65 años
☐ Medicaid/Medi-Cal para Familias A y B
☐ CalFresh/Programa Suplementario de Asistencia Nutricional (SNAP)
☐ Ingreso elegible para Head Start (tribal únicamente)
☐ Buró de Asistencia General para Asuntos de Nativos Americanos
☐ Programa para Mujeres, Bebés y Niños (WIC)
☐ Programa Nacional de Almuerzos Escolares (NSLP)
☐ Programa de Asistencia a Hogares de Escasos Recursos para Gastos de Energía (LIHEAP)
☐ Seguridad de Ingreso Suplementario (SSI)
☐ CalWORKs/Asistencia Temporal para Familias Necesitadas (TANF)
☐ TANF Tribal
Si no participa en ninguno de los programas anteriores, por favor llene la sección 2B.

Requisitos de ingreso en el hogar: (para los Programas CARE o FERA)
Si su hogar no participa en un programa de asistencia pública **por favor marque todas las fuentes de ingreso del hogar para todos los miembros del hogar** y escriba el ingreso total en los espacios señalados.
☐ Salarios y/o utilidades por autoempleo
☐ Ingresos por alquiler o regalías
☐ Pensiones
☐ Seguro Social
☐ SSP o SSDI
☐ Pagos por incapacidad o indemnización para los trabajadores
☐ Beneficios de desempleo
☐ Becas, indemnizaciones u otra ayuda para sufragar el costo de la vida
☐ Intereses/Dividendos de ahorros, acciones, bonos o cuentas para el retiro
☐ Pensión conyugal o alimenticia
☐ Indemnizaciones de seguro o fiaqulitos legales
☐ Ingreso en efectivo o de otro tipo
Ingreso total anual en el hogar: $ ☐,☐☐☐.00

Declaración: (favor de leer y firmar en la parte inferior)
Declaro que la información que proporcioné en este formulario de solicitud es verdadera y correcta. Convengo en proporcionar comprobantes de ingreso si me son solicitados. Convengo en informar a SDGE si dejo de reunir los requisitos necesarios para recibir el descuento. Entiendo que si recibo algún descuento sin reunir los requisitos para el mismo, tal vez se me exija devolver el importe del descuento que recibí. Entiendo que SDGE puede compartir mi información con otras empresas de servicios públicos o con sus agentes para inscribirme en sus programas de asistencia.

SOURCE CODE 40

Appendix A. 5 - Sample Summer Prep Pocket Card

To learn more about ways you can save this summer visit *sdge.com/summer*.

SDGE

A Sempra Energy utility

Connect with us at **sdge.com** and on social media

twitter.com/sdge
facebook.com/SanDiegoGasandElectric
pinterest.com/sdge
youtube.com/SDGEWebmaster

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Take the heat off your wallet with these summer energy-saving tips

Electric rates change based on the season. They're higher in the summer and lower in the winter. This, combined with the changes to the electric rate structure, may mean higher energy bills especially if September is a hot month as predicted.

- **Set your air conditioner to 78 degrees** or higher. Changing the A/C thermostat from 72 to 78 degrees can save up to 12% of your cooling costs.
- **Switch to fans when you can.** Use a portable or ceiling fan instead of A/C when you can comfortably do so.
- **Make the light choice.** When you replace lights, choose energy-efficient products such as LEDs and CFLs.
- **Use a pool or spa cover.** Covers can reduce heat loss by up to 90%.
- **Alert yourself to energy use.** Monitor your energy use with **Energy Alerts** and get notifications when you cross from tier to tier or when your bill hits a certain dollar amount. Login to My Account to set your alerts at *sdge.com/myaccount*.

SDGE

A Sempra Ener

Energy-saving ideas for summer

Request a house call if you're not sure where to begin

Call **1-800-411-7343** to schedule a free in-home energy survey with one of our customer energy specialists. To see how one in-home visit uncovered $1,840 in potential annual energy savings, watch our video, "Tag Along: Find Your Energy Savings," at *sdge.com/survey*.

Reduce your use and save.

If you have central A/C, you may be eligible for a free smart thermostat **valued at $300** when you sign up for Reduce Your Use Rewards. If you qualify, we'll install the thermostat and you'll be able to use your mobile device to adjust and monitor temperature settings on your A/C. Apply at *sdge.com/thermostat*.

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

In addition to a bill discount you may also be eligible for free home improvements and energy-efficient appliances. Eligibility is based on your household size and yearly income or by your household participation in certain public assistance programs. Visit *sdge.com/care* to apply.

Energy savings have helped Toni's budget, allowing her to do more with her grandkids.

Let your bill take a dip by using our no-cost Water and Energy-Savings Kit

The kit includes three faucet aerators, a low-flow showerhead and an LED night light to help you save energy and water. To request your no-cost kit, visit *sdge.com/kit*. Learn more about ways you can save water at *whenindrought.org*.

Shop for your next energy-efficient appliance with us

You can now shop for energy-efficient appliances and learn about available rebates all in one convenient place. With **SDG&E Marketplace**, it's easy and convenient to find the best deals on energy-efficient products that can significantly lower your energy use and your monthly electr bill. Visit *sdgemarketplace.com* to shop now.

(See additional tips on rev

7. APPENDIX B: 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

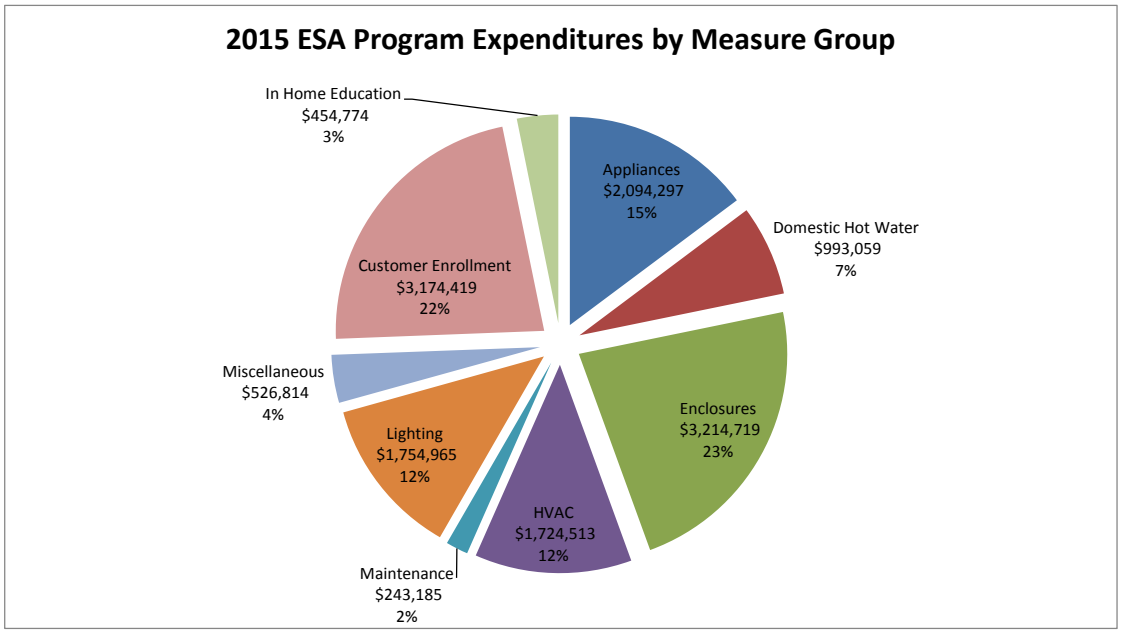
2015 Summary Highlights

ESA Program

2015 Energy Savings Assistance Program Summary			
2015	**Authorized / Planning Assumptions**	**Actual**	**%**
Budget	$23,772,250	$17,355,596	73%
Homes Treated	20,316	20,209	99%
kWh Saved	7,886,586	3,760,368	48%
kW Demand Reduced	697	438	63%
Therms Saved	366,432	259,237	71%

CARE Program

2015 CARE Summary			
2015	**Authorized Budget**	**Actual**	**%**
Administrative Expenses	$5,485,965	$5,346,303	97%
Subsidies	$83,614,933	$76,448,948	91%
Service Establishment Charge	$0	$0	0%
Total Program Costs and Discounts	**$89,100,898**	**$81,795,251**	92%
2015CARE New Enrollments	**Automatically Enrolled via Data Sharing, ESA Participation, etc**	**Self Certified as Categorically Eligible**	**Self Certified as Income Eligible**
Method	2,774	26,665	34,318
2015 CARE Penetration	**Estimated Eligible Participants**	**Participants**	**Penetration Rate**
Total Enrolled	370,088	271,247	73%



San Diego Gas Electric Company

PY 2015 Energy Savings Assistance Program Annual Report
ESAP Table 1
ESAP Overall Program Expenses

	A	B	C	D	E	F	G	H	I	J
2		**2015 Authorized Budget[1]**			**2015 Annual Expenses[2]**			**% 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	$ 1,714,408	$ 379,889	$ 2,094,297	47%	29%	42%
6	Domestic Hot Water	$ 58,325	$ 1,997,193	$ 2,055,518	$ 29,792	$ 963,267	$ 993,059	51%	48%	48%
7	Enclosure	$ 1,850,540	$ 2,739,307	$ 4,589,847	$ 1,382,329	$ 1,832,390	$ 3,214,719	75%	67%	70%
8	HVAC	$ 392,199	$ 3,535,658	$ 3,927,857	$ 69,323	$ 1,655,189	$ 1,724,513	18%	47%	44%
9	Maintenance	$ 4,464	$ 566,414	$ 570,879	$ 263	$ 242,923	$ 243,185	6%	43%	43%
10	Lighting	$ 2,775,286	$ -	$ 2,775,286	$ 1,754,965	$ -	$ 1,754,965	63%	N/A	63%
11	Miscellaneous	$ 484,540	$ -	$ 484,540	$ 526,814	$ -	$ 526,814	109%	N/A	109%
12	Customer Enrollment	$ 1,692,820	$ 1,692,820	$ 3,385,641	$ 1,587,209	$ 1,587,209	$ 3,174,419	94%	94%	94%
13	In Home Education	$ 215,167	$ 215,167	$ 430,334	$ 227,387	$ 227,387	$ 454,774	106%	106%	106%
14	Pilot	$ -	$ -	$ -			$ -	N/A	N/A	N/A
15	Fund Shifting Offset	$ (499,405)	$ (2,633,333)	$ (3,132,739)				N/A	N/A	N/A
16	**Energy Efficiency TOTAL**	**$ 10,600,255**	**$ 9,419,440**	**$ 20,019,695**	**$ 7,292,489**	**$ 6,888,255**	**$ 14,180,744**	**69%**	**73%**	**71%**
17										
18	Training Center	$ -	$ -	$ -	$ -	$ -	$ -	N/A	N/A	N/A
19	Inspections	$ 49,603	$ 49,603	$ 99,206	$ 45,404	$ 45,403	$ 90,807	92%	92%	92%
20	Marketing and Outreach	$ 582,359	$ 582,359	$ 1,164,718	$ 506,954	$ 506,954	$ 1,013,908	87%	87%	87%
21	Statewide Marketing Education and Outreach	$ -	$ -	$ -	$ -	$ -	$ -	N/A	N/A	N/A
22	Measurement and Evaluation Studies	$ 57,500	$ 57,500	$ 115,000	$ -	$ -	$ -	0%	0%	0%
23	Regulatory Compliance	$ 161,107	$ 161,107	$ 322,214	$ 127,777	$ 127,777	$ 255,554	79%	79%	79%
24	General Administration	$ 1,003,208	$ 1,003,208	$ 2,006,417	$ 900,238	$ 900,237	$ 1,800,475	90%	90%	90%
25	CPUC Energy Division	$ 22,500	$ 22,500	$ 45,000	$ 7,054	$ 7,054	$ 14,108	31%	31%	31%
26										
27	**TOTAL PROGRAM COSTS**	**$ 12,476,532**	**$ 11,295,718**	**$ 23,772,250**	**$ 8,879,917**	**$ 8,475,680**	**$ 17,355,596**	**71%**	**75%**	**73%**
28	**Funded Outside of ESA Program Budget**									
29	Indirect Costs				$ 450,090	$ 448,329	$ 898,420			
30	NGAT Costs					$ 181,529	$ 181,529			
31										

32 [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.

33 [2] Total Expenditures includes cash discounts applied for payment terms of ($27,908). Cash discounts were initiated in 2015.

San Diego Gas Electric Company

PY 2015 Energy Savings Assistance Program Annual Report
ESAP Table 2
ESAP Expenses and Energy Savings by Measures Installed

	A	B	C	D	E	F	G	H
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	533	2,950	0.38	8,073	$ 379,889	2.67%
6	Refrigerators	Each	1,267	781,846	92.28	-	$ 1,021,000	7.19%
7	Microwaves	Each	6,776	-	-	158,815	$ 695,818	4.90%
8	**Domestic Hot Water**							
9	Water Heater Blanket	Home	278	43	0.01	125	$ 15,237	0.11%
10	Low Flow Shower Head	Home	5,066	873	0.11	2,932	$ 362,426	2.55%
11	Water Heater Pipe Insulation	Home	213	4	-	6	$ 4,192	0.03%
12	Faucet Aerator	Home	11,284	737	0.10	3,371	$ 98,661	0.69%
13	Water Heater Repair/Replacement	Each	1,954	-	-	5,386	$ 282,734	1.99%
14	Thermostatic Shower Valve	Each	3,834	11,543	1.37	9,049	$ 230,705	1.62%
15	**Enclosure**							
16	Air Sealing / Envelope	Home	6,354	313,510	65.89	14,323	$ 2,464,352	17.34%
17	Attic Insulation	Home	687	67,184	13.02	16,881	$ 750,754	5.28%
18	**HVAC**							
19	FAU Standing Pilot Light Conversion	Each	37	-	-	559	$ 11,655	0.08%
20	Furnace Repair/Replacement	Each	6,441	-	-	-	$ 1,545,317	10.88%
21	Room A/C Replacement	Each	72	1,833	0.36	-	$ 69,571	0.49%
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	626	34,881	7.32	8,836	$ 100,986	0.71%
27	**Maintenance**							
28	Furnace Clean and Tune	Home	3,146	-	-	30,880	$ 243,187	1.71%
29	Central A/C Tune-up	Home	2	511	0.10	-	$ 263	0.00%
30	Evaporative Cooler Maintenance	Home	-				$ -	0.00%
31	**Lighting**							
32	Compact Fluorescent Lights (CFLs)	Each	106,484	1,856,926	225.21	-	$ 789,110	5.55%
33	Interior Hard wired CFL fixtures	Each	2,325	97,627	6.74	-	$ 173,612	1.22%
34	Exterior Hard wired CFL fixtures	Each	1,082	45,433	3.14	-	$ 60,920	0.43%
35	Torchiere	Each	5,764	129,513	16.23	-	$ 551,384	3.88%
36	Occupancy Sensor	Each	-				$ -	0.00%
37	LED Night Lights	Each	55,660	62,399	5.68	-	$ 184,437	1.30%
38	**Miscellaneous**							
39	Pool Pumps	Each	-				$ -	0.00%
40	Smart Power Strips	Each	14,390	352,555	-	-	$ 528,838	3.72%
41	**Pilots**							
42		Each						0.00%
43		Each						0.00%
44	**Customer Enrollment**							
45	Outreach & Assessment	Home	20,258				$ 3,187,014	22.43%
46	In-Home Education	Home	20,110				$ 456,592	3.21%
47								
48	**Total Savings and Expenditures[2][3]**			3,760,368	438	259,237	$ 14,208,652	100.00%
49								
50	Homes Weatherized	Home	6,212					
51								
52	Homes Treated							
53	- Single Family Homes Treated	Home	9,902					
54	- Multi-family Homes Treated	Home	9,687					
55	- Mobile Homes Treated	Home	620					
56	**- Total Number of Homes Treated**	**Home**	20,209					
57	**# Eligible Homes to be Treated in 2015**	**Home**	20,316					
58	**% OF Homes Treated**	**%**	99%					
59	- Total Master-Metered Homes Treated	Home	396					

60
61 Notes:
62
63 [1] For Duct testing and sealing, number represents 147 homes both tested and sealed in the amount of $55,021. 494 homes received duct testing only in the amount of $45,965.
64 There are no energy savings associated with duct testing.
65 [2] Total Expenditures do not include cash discounts applied for payment terms of ($27,908).
66 [3] Ordering Paragraph 34 of D.14-08-030 adopts the 2013 ESA Impact Evaluation. The results from that study were used in this Annual Report.
67 [4] For microwaves, the savings estimate comes from a separate analysis completed by Evergreen Economics. A reasonable estimate for the usage of the microwave, which would be shown as negative kWh, is not available at this time; however, we expect this to be addressed in the next impact evaluation.
68
69
70

San Diego Gas Electric Company

PY 2015 Energy Savings Assistance Program Annual Report
ESAP Table 3
Program Cost Effectiveness

Ratio of Benefits Over Costs			Net Benefits $	
ProgramYear	**ESACET**	**ResourceTRC**	**ESACET**	**ResourceTRC**
2015	0.79	0.67	(3,459,669)	(2,891,821)

Notes:

- All program measures "resource and non-resource measures" are included in the ESACET. Only measures considered "resource measures" are included in the Resource TRC.
- The ESACET includes energy and non-energy benefits and all program costs including measure, installation, and administrative costs.
- The Resource TRC includes energy benefits and program measure and installation costs.
- Ordering Paragraph 34 of D.14-08-030 adopts the 2013 ESA Impact Evaluation. The results from that study were used in this Annual Report.
- Ordering Paragraph 43 of D.14-08-030 directs the application of the two new cost effectiveness tests, ESACET and Resource TRC, by replacing the existing tests shown below in the table.

PY 2015 Energy Savings Assistance Program Annual Report

	PY - Recorded					
	Ratio of Benefits Over Costs			Net Benefits		
Program Year	Utility Cost Test	Total Resource Cost Test	Modified Participant Test	Utility Cost Test	Total Resource Cost Test	Modified Participant Test
2015	0.49	0.35	0.62	$ (8,635,325)	$ (10,967,664)	$ (6,547,355)
2014	0.63	0.47	0.66	$ (6,857,471)	$ (9,875,940)	$ (6,528,676)
2013	0.51	0.40	0.60	$ (8,155,801)	$ (9,943,021)	$ (7,146,892)
2012	0.68	0.53	0.86	$ (6,858,625)	$ (10,037,753)	$ (2,953,674)
2011	0.45	0.33	0.90	$ (11,090,027)	$ (13,403,509)	$ (2,139,522)
2010	0.50	0.38	0.95	$ (9,449,217)	$ (11,642,291)	$ (1,079,270)
2009	0.54	0.42	0.83	$ (7,204,451)	$ (9,201,740)	$ (2,809,076)
2008	0.64	0.52	0.77	$ (6,120,166)	$ (8,121,185)	$ (4,070,011)
2007	0.41	0.32	0.62	$ (7,781,493)	$ (8,954,377)	$ (4,866,416)
2006	0.33	0.54	0.61	$ (9,883,548)	$ (6,602,546)	$ (5,837,643)
2005	0.45	0.70	0.99	$ (7,115,009)	$ (3,896,685)	$ (66,902)
2004	0.47	0.73	1.07	$ (7,584,889)	$ (3,905,982)	$ 938,847
2003	0.47	0.66	1.01	$ (6,793,286)	$ (4,419,991)	$ 122,456
2002	0.41	0.63	0.83	$ (7,298,174)	$ (4,597,814)	$ (2,053,787)

PY 2015 Energy Savings Assistance Program Annual Report
ESAP Table 4
Detail by Housing Type and Source

		2015 Energy Savings[5]				
Customer	Housing Type	# Homes Treated	(mWh)	MW	(mTherm)	2015 Expenses[1]
Gas and Electric Customers						
Owners - Total		**5,178**	**1,394**	**0.175**	**102**	**$ 7,194,745**
	Single Family	4,169	1,111	0.140	89.6	$ 5,791,438
	Multi Family	499	109	0.013	4.5	$ 338,623
	Mobile Homes	510	174	0.022	7.6	$ 1,064,684
Renters - Total		**12,641**	**1,806**	**0.205**	**144**	**$ 5,855,529**
	Single Family	4,444	826	0.096	66.2	$ 2,928,818
	Multi Family	8,166	971	0.108	77.9	$ 2,897,001
	Mobile Homes	31	8	0.001	0.4	$ 29,710
Electric Customers (only)						
Owners - Total		**940**	**280**	**0.029**	**3**	**$ 566,231**
	Single Family	743	226	0.024	2.3	$ 461,680
	Multi Family	135	37	0.004	0.8	$ 71,907
	Mobile Homes	62	17	0.002	0.1	$ 32,643
Renters - Total		**1,450**	**281**	**0.029**	**10**	**$ 592,147**
	Single Family	546	146	0.015	2.7	$ 281,491
	Multi Family	887	132	0.014	7.1	$ 303,087
	Mobile Homes	17	4	0.000	0.0	$ 7,569
Gas Customers (only)						
Owners - Total		**-**	**-**	**-**	**-**	**-**
	Single Family					
	Multi Family					
	Mobile Homes					
Renters - Total		**-**	**-**	**-**	**-**	**-**
	Single Family					
	Multi Family					
	Mobile Homes					
Totals:		**20,209**	**3,760**	**0.438**	**259**	**14,208,652**

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	20,209	17,308	20,316	99%
2016				
2017				
2018				
2019				
2020				
Total Homes Treated since 2002	250,921	78,126	142,416	

[1]Costs exclude outreach, assessment, education, and all administrative and 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 and D.14-08-030.
[5] Ordering Paragraph 34 of D.14-08-030 adopts the 2013 ESA Impact Evaluation. The results from that study were used in this Annual Report.

Year	Utility in Shared Service Territory	Eligible Households in Shared Service Territory	Eligible households treated by both utilities in shared
2015	SoCalGas	19,087	233

San Diego Gas Electric Company

	A	B	C	D	E	F	G
1	**PY 2015 Energy Savings Assistance Program Annual Report ESAP Table 5 ESAP Direct Purchases & Installation Contractors**						
2			**Contractor Type (Check one or more if applicable)**				**2015 Annual Expenditures [1]**
3	**Contractor**	**County**	**Private**	**CBO**	**WMDVBE**	**LIHEAP**	
4	AMERICAN INSULATION INC	San Diego	x		x		$ 1,187,793
5	AMERIMEX	San Diego	x		x		$ 181,238
6	CAMPESINOS UNIDOS INC	San Diego		x	x	x	$ 348,182
7	CAPITAL STATE CONTRUCTION	San Diego	x				$ 841,888
8	EAGLE SYSTEMS INTERNATIONAL INC	San Diego	x				$ 661,790
9	JERRY'S HEATING & AIR CONDITIONING, INC	San Diego	x				$ 594,444
10	MAAC PROJECT	San Diego		x	x	x	$ 493,702
11	R&B WHOLESALE DISTRIBUTOR INC	San Diego	x				$ 1,402,181
12	RANCHO ENERGY SERVICES	San Diego	x		x		$ 1,348,928
13	RELIABLE ENERGY MANAGEMENT INC	San Diego			x		$ 302,082
14	RICHARD HEATH & ASSOCIATES INC	San Diego, Orange	x		x		$ 5,900,172
15	THA HEATING AND AIR CONDITIONING INC	San Diego	x				$ 711,657
16	MARCON ENGINEERING, INC.	San Diego	x		x		$ 12,915
17	ESPINOZAS HEATING & AIR	San Diego	x		x		$ 221,680
18	**Total Contractor Expenditures**						**$ 14,208,652**
19							
20	[1] Expenditures do not include cash discounts applied for payment terms of ($27,908).						
21							

San Diego Gas Electric Company

PY 2015 Energy Savings Assistance Program Annual Report
ESAP Table 6
ESAP Installation Cost of Program Installation Contractors

			CBO/WMDVBE						Non-CBO/WMDVBE						2015 Program Total				
		Unit of Measure	Installations		Dwellings		Costs		Installations		Dwellings		Costs			Households			Cost/
			Units	%	Units	%	$	%	Units	%	Units	%	$	%	Units Installed	[1]	Costs [3]	Cost/ Unit	Household
5	Dwellings	Each	251,870	92%	19,280	95%	$ 9,986,360	70%	22,723	8%	929	5%	$ 4,222,292	30%	274,593	20,209	$ 14,208,652	$ 51.74	$ 703.09
6	**Appliances**																		
7	High Efficiency Clothes Washer	Each	-	0%	-	0%	$ -	0%	533	100%	533	100%	$ 379,889	100%	533	533	$ 379,889	$ 713	$ 713
8	Refrigerators	Each	-	0%	-	0%	$ -	0%	1,267	100%	1,234	100%	$ 1,021,000	100%	1,267	1,234	$ 1,021,000	$ 806	$ 827
9	Microwaves	Each	6,401	94%	6,403	94%	$ 651,287	94%	375	6%	375	6%	$ 44,531	6%	6,776	6,778	$ 695,818	$ 103	$ 103
10	**Domestic Hot Water**																		
11	Water Heater Blanket	Home	224	81%	224	81%	$ 12,301	81%	54	19%	54	19%	$ 2,937	19%	278	278	$ 15,237	$ 55	$ 55
12	Low Flow Shower Head	Home	3,501	69%	3,501	69%	$ 253,299	70%	1,565	31%	1,565	31%	$ 109,127	30%	5,066	5,066	$ 362,426	$ 72	$ 72
13	Water Heater Pipe Insulation	Home	106	50%	106	50%	$ 1,792	43%	107	50%	107	50%	$ 2,400	57%	213	213	$ 4,192	$ 20	$ 20
14	Faucet Aerator	Home	10,384	92%	10,384	92%	$ 88,755	90%	900	8%	900	8%	$ 9,906	10%	11,284	11,284	$ 98,661	$ 9	$ 9
15	Water Heater Repair/Replacement	Each	1,413	72%	520	65%	$ 129,729	46%	541	28%	278	35%	$ 153,004	54%	1,954	798	$ 282,734	$ 145	$ 354
16	Thermostatic Shower Valve	Each	2,383	62%	1,493	62%	$ 143,309	62%	1,451	38%	898	38%	$ 87,396	38%	3,834	2,391	$ 230,705	$ 60	$ 96
17	**Enclosure**																		
18	Air Sealing / Envelope	Home	4,189	66%	4,189	66%	$ 1,694,514	69%	2,165	34%	2,165	34%	$ 769,839	31%	6,354	6,354	$ 2,464,352	$ 388	$ 388
19	Attic Insulation	Home	526	77%	526	77%	$ 546,830	73%	161	23%	161	23%	$ 203,924	27%	687	687	$ 750,754	$ 1,093	$ 1,093
20	**HVAC**																		
21	FAU Standing Pilot Light Conversion	Each	23	62%	23	62%	$ 7,245	62%	14	38%	14	38%	$ 4,410	38%	37	37	$ 11,655	$ 315	$ 315
22	Furnace Repair/Replacement	Each	4,194	65%	2,502	79%	$ 437,777	28%	2,246	35%	680	21%	$ 1,107,541	72%	6,440	3,182	$ 1,545,317	$ 240	$ 486
23	Room A/C Replacement	Each	72	100%	63	100%	$ 69,571	100%	-	0%	-	0%	$ -	0%	72	63	$ 69,571	$ 966	$ 1,104
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	519	83%	519	83%	$ 51,327	51%	107	17%	107	17%	$ 49,658	49%	626	626	$ 100,986	$ 161	$ 161
29	**Maintenance**																		
30	Furnace Clean and Tune	Home	3,037	97%	3,037	97%	$ 236,663	97%	109	3%	109	3%	$ 6,524	3%	3,146	3,146	$ 243,187	$ 77	$ 77
31	Central A/C Tune-up	Home	-	0%	-	0%	$ -	0%	2	100%	2	100%	$ 263	100%	2	2	$ 263	$ 131	$ 131
32	Evaporative Cooler Maintenance	Home	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
33	**Lighting**																		
34	Compact Fluorescent Lights (CFLs)	Each	101,093	95%	19,429	96%	$ 742,387	94%	5,391	5%	843	4%	$ 46,723	6%	106,484	20,272	$ 789,110	$ 7	$ 39
35	Interior Hard wired CFL fixtures	Each	1,945	84%	889	82%	$ 144,603	83%	380	16%	196	18%	$ 29,009	17%	2,325	1,085	$ 173,612	$ 75	$ 160
36	Exterior Hard wired CFL fixtures	Each	907	84%	558	81%	$ 50,858	83%	175	16%	131	19%	$ 10,063	17%	1,082	689	$ 60,920	$ 56	$ 88
37	Torchiere	Each	5,436	94%	3,460	92%	$ 518,584	94%	328	6%	297	8%	$ 32,800	6%	5,764	3,757	$ 551,384	$ 96	$ 147
38	Occupancy Sensor	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
39	LED Night Lights	Each	53,926	97%	19,146	96%	$ 178,610	97%	1,734	3%	869	4%	$ 5,827	3%	55,660	20,015	$ 184,437	$ 3	$ 9
40	**Miscellaneous**																		
41	Pool Pumps	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
42	Smart Power Strips	Each	13,079	91%	9,670	93%	$ 480,659	91%	1,311	9%	746	7%	$ 48,179	9%	14,390	10,416	$ 528,838	$ 37	$ 51
43	**Pilots**																		
44		Each		0%						0%					-	-	$ -	$ -	$ -
45		Each		0%						0%					-	-	$ -	$ -	$ -
46	**Customer Enrollment**																		
47	Outreach & Assessment	Home	19,280	95%	19,280	95%	$ 3,108,903	98%	929	5%	929	5%	$ 78,110	2%	20,209	20,209	$ 3,187,014	$ 158	$ 158
48	In-Home Education	Home	19,232	96%	19,232	96%	$ 437,358	96%	878	4%	878	4%	$ 19,234	4%	20,110	20,110	$ 456,592	$ 23	$ 23

[1] Some households were served by both CBO/WMDVBE and non-CBO/WMDVBE contractors.

[2] For Duct testing and sealing, number represents 147 homes both tested and sealed in the amount of $55,021. A total of 27 of these homes were tested and sealed by CBO/WMDVBE contractors in the amount of $5,362. The remaining 120 homes were tested and sealed by non-CBO/WMDVBE contractors in the amount of $49,658. 494 homes received duct testing only in the amount of $45,965. All 494 homes receiving duct test only were served by COB/MWDBE contractors. There are no energy savings associated with duct testing.

[3] Expenditures do not include cash discounts applied for payment terms of ($27,908).

San Diego Gas Electric Company

	A	B	C	D	E
1	**PY 2015 Energy Savings Assistance Program Annual Report ESAP Table 7 Expenditures Recorded by Cost Element**				
2	**ESA Program:**	**Labor**	**Non-Labor[1]**	**Contractor**	**Total**
3	**Energy Efficiency**				
4	Appliances	$ -	$ (2,410)	$ 2,096,708	$ 2,094,297
5	Domestic Hot Water	$ -	$ (895)	$ 993,954	$ 993,059
6	Enclosure	$ -	$ (387)	$ 3,215,106	$ 3,214,719
7	HVAC	$ -	$ (3,016)	$ 1,727,529	$ 1,724,513
8	Maintenance	$ -	$ (264)	$ 243,450	$ 243,185
9	Lighting	$ -	$ (4,498)	$ 1,759,463	$ 1,754,965
10	Miscellaneous	$ -	$ (2,024)	$ 528,838	$ 526,814
11	Customer Enrollment	$ -	$ (12,595)	$ 3,187,014	$ 3,174,419
12	In Home Education	$ -	$ (1,818)	$ 456,592	$ 454,774
13	Pilot	$ -	$ -	$ -	$ -
14	Fund Shifting Offset	$ -	$ -	$ -	
15	**Energy Efficiency TOTAL**	**$ -**	**$ (27,908)**	**$ 14,208,652**	**$ 14,180,744**
16					
17	Training Center	$ -	$ -	$ -	$ -
18	Inspections	$ 90,782	$ 25	$ -	$ 90,807
19	Marketing and Outreach	$ -	$ 1,013,908	$ -	$ 1,013,908
20	Statewide Marketing Education and Outreach	$ -	$ -	$ -	$ -
21	Measurement and Evaluation Studies	$ -	$ -	$ -	$ -
22	Regulatory Compliance	$ 227,202	$ 28,352	$ -	$ 255,554
23	General Administration	$ 1,164,012	$ 636,463	$ -	$ 1,800,475
24	CPUC Energy Division	$ -	$ 14,108	$ -	$ 14,108
25					
26	**TOTAL PROGRAM COSTS**	**$ 1,481,996**	**$ 1,664,948**	**$ 14,208,652**	**$ 17,355,596**
27					
28	[1] Total Expenditures includes cash discounts applied for payment terms of ($27,908). Cash discounts were initiated in 2015.				
29					

	A	B	C	D	E	F	G	H	I
1	**PY 2015 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	16,087	203	-	28	39	8,470	1,252	262
5	Orange	1,221	-	-	2	1	448	5	14
6	**Total**	**17,308**	**203**	**-**	**30**	**40**	**8,918**	**1,257**	**276**

San Diego Gas Electric Company

	A	B	C	D	E	F	G
1	**PY 2015 Energy Savings Assistance Program Annual Report ESAP Table 9 Life Cycle Bill Savings by Measure**						
2	**Measure Description**		**2015 Number Installed**	**Per Measure Electric Impact - Average (kWh)**	**Per Measure Gas Impact (Therms)**	**Effective Useful Life (EUL)**	**2015 Total Measure Life Cycle Bill Savings**
3	**Appliances**						
4	High Efficiency Clothes Washer	Each	533	122.92	15.86	11	$ 44,316
5	Refrigerators	Each	1,267	617.08	-	14	$ 1,257,053
6	Microwaves [1]	Each	6,776	-	23.57	10	$ 737,671
7	**Domestic Hot Water**						
8	Water Heater Blanket	Home	278	3.90	0.47	5	$ 357
9	Low Flow Shower Head	Home	5,066	3.67	0.61	10	$ 14,716
10	Water Heater Pipe Insulation	Home	213	0.35	0.08	11	$ 38
11	Faucet Aerator	Home	11,284	2.05	0.31	10	$ 16,582
12	Water Heater Repair/Replacement	Each	1,954	-	6.80	11	$ 26,909
13	Thermostatic Shower Valve	Each	3,834	60.43	2.49	10	$ 56,510
14	**Enclosure**						
15	Air Sealing / Envelope	Home	6,354	49.84	2.88	11	$ 498,532
16	Attic Insulation	Home	687	95.98	26.92	20	$ 262,541
17	**HVAC**						
18	FAU Standing Pilot Light Conversion	Each	37	-	15.10	13	$ 3,157
19	Furnace Repair/Replacement	Each	6,441	-	-	20	$ -
20	Room A/C Replacement	Each	72	25.46	-	8	$ 2,116
21	Central A/C Replacement	Each	-				$ 641
22	Heat Pump Replacement	Each	-				
23	Evaporative Coolers (Replacement)	Each	-				
24	Evaporative Coolers (Installation)	Each	-				
25	Duct Testing and Sealing	Home	626	55.72	14.61	18	$ 128,360
26	**Maintenance**						
27	Furnace Clean and Tune	Home	3,146	-	10.23	5	$ 80,420
28	Central A/C Tune-up	Home	2	255.54	-	10	
29	Evaporative Cooler Maintenance	Home	-				
30	**Lighting**						
31	Compact Fluorescent Lights (CFLs)	Each	106,484	17.44	-	7	$ 1,530,899
32	Interior Hard wired CFL fixtures	Each	2,325	41.99	-	16	$ 171,856
33	Exterior Hard wired CFL fixtures	Each	1,082	41.99	-	20	$ 91,966
34	Torchiere	Each	5,764	22.47	-	16	$ 227,986
35	Occupancy Sensor	Each	-				
36	LED Night Lights	Each	55,660	1.12	-	16	$ 109,844
37	**Miscellaneous**						
38	Pool Pumps	Each	-				
39	Smart Power Strips	Each	14,390	24.50	-	8	$ 370,111
40	**Pilots**						
41		Each					
42							
43	**Total Homes Served By the Program**						$ 20,209
44	**Life Cycle Bill Savings Per Home**						$ 279
45							
46	Note: Ordering Paragraph 34 of D.14-08-030 adopts the 2013 ESA Impact Evaluation.The results from that study were used in this Annual Report.						
47	[1] For microwaves, the savings estimate comes from a separate analysis completed by Evergreen Economics. A reasonable estimate for the usage of the microwave, which would be shown as negative kWh, is not available at this time; however, we expect this to be addressed in the next impact evaluation.						
48							

San Diego Gas Electric Company

	A	B	C
1	**PY 2015 Energy Savings Assistance Program Annual Report ESAP Table 10 Energy Rate Used for Bill Savings Calculations[1]**		
2	Year	$/kWh	$/Therm
3	2015	0.15	0.57
4	2016	0.16	0.59
5	2017	0.16	0.61
6	2018	0.17	0.63
7	2019	0.17	0.64
8	2020	0.18	0.66
9	2021	0.18	0.68
10	2022	0.19	0.70
11	2023	0.20	0.73
12	2024	0.20	0.75
13	2025	0.21	0.77
14	2026	0.21	0.79
15	2027	0.22	0.82
16	2028	0.23	0.84
17	2029	0.23	0.87
18	2030	0.24	0.89
19	2031	0.25	0.92
20	2032	0.26	0.95
21	2033	0.26	0.98
22	2034	0.27	1.00
23	2035	0.28	1.03
24	2036	0.29	1.07
25	2037	0.30	1.10
26	2038	0.31	1.13
27	2039	0.31	1.16
28	2040	0.32	1.20
29			
30	[1] For 2015, the average cost per kWh and therm paid by ESA participants is shown. Cost is escalated 3% annually in next 24 years.		
31			

San Diego Gas Electric Company

	A	B	C	D	E
1	**PY 2015 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	2015	$ 17,355,596	$ 5,632,584	0.32	$ 279
8					
9					
10					

PY 2015 Energy Savings Assistance Program Annual Report
ESAP Table 12
Fund Shifting[1]

Date[5]	Program Year 2015	Budget[1] Electric	Budget[1] Gas	Budget[1] Total Authorized	Expenditures Electric	Expenditures Gas	Total Expenditures[7]	(Shift) or Carried Forward (Budget - Expenditures = Variance) Electric	Variance Gas	Variance Total	FUND SHIFT AMOUNT: Among Categories within Program Year 1-3 (1) Shift of Current Year Authorized Electric	(1) Gas	(1) Total	Carry Forward from 2014 (2) Shift of Carry Forward Electric	(2) Gas	(2) Total	Carry Back from 2016 (3) Shift of Carry Back Electric	(3) Gas	(3) Total	Total Shifted Gas/ Electric[4]	% of Authorized Total	Fund Shifting Source 1. Current Year Authorized 2. Carried Forward 3. Carried Back	To/From Year	Fund Shift Description	Authorization
	ESA Program:	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	*($x,xxx)*	*x%*	*Carried Forward*	*From 2008*	*From In-Home Education*	*G-xxxx, D.xx- xx-xxx*
	Energy Efficiency																								
	Appliance	$ 3,626,319	$ 1,306,214	**$ 4,932,533**	$ 1,714,408	$ 379,889	**$ 2,094,297**	$ 1,911,911	$ 926,325	**$ 2,838,236**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Domestic Hot Water	$ 58,325	$ 1,997,193	**$ 2,055,518**	$ 29,792	$ 963,267	**$ 993,059**	$ 28,533	$ 1,033,926	**$ 1,062,459**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Enclosure	$ 1,850,540	$ 2,739,307	**$ 4,589,847**	$ 1,382,329	$ 1,832,390	**$ 3,214,719**	$ 468,211	$ 906,917	**$ 1,375,128**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	HVAC	$ 392,199	$ 3,535,658	**$ 3,927,857**	$ 69,323	$ 1,655,189	**$ 1,724,513**	$ 322,876	$ 1,880,469	**$ 2,203,344**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Maintenance	$ 4,464	$ 566,414	**$ 570,879**	$ 263	$ 242,923	**$ 243,185**	$ 4,202	$ 323,491	**$ 327,693**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Lighting	$ 2,775,286	$ -	**$ 2,775,286**	$ 1,754,965	$ -	**$ 1,754,965**	$ 1,020,321	$ -	**$ 1,020,321**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
Dec-15	Miscellaneous[4]	$ 484,540	$ -	**$ 484,540**	$ 526,814	$ -	**$ 526,814**	$ (42,274)	$ -	**$ (42,274)**	$ -	$ -	**$ -**	$ 42,274	$ -	**$ 42,274**	$ -	$ -	**$ -**	$ (42,274)	0.2%	1. 2. Carried Forward 3.	1. 2. From 2014 3.	1. 2. From 2014 & prior years carried forward unspent funds. 3.	1. 2. Authorized by D.08-11-031 and as modified by D.10-10-008, D.12-08-044, and D.14-08-030. . 3.
	Customer Enrollment	$ 1,692,820	$ 1,692,820	**$ 3,385,641**	$ 1,587,209	$ 1,587,209	**$ 3,174,419**	$ 105,611	$ 105,611	**$ 211,222**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
Dec-15	In Home Education[3,4]	$ 215,167	$ 215,167	**$ 430,334**	$ 227,387	$ 227,387	**$ 454,774**	$ (12,220)	$ (12,220)	**$ (24,440)**	$ -	$ -	**$ -**	$ 12,220	$ 12,220	**$ 24,440**	$ -	$ -	**$ -**	$ (24,440)	0.1%	1. 2. Carried Forward 3.	1. 2. From 2014 3.	1. 2. From 2014 & prior years carried forward unspent funds. 3.	1. 2. Authorized by D.08-11-031 and as modified by D.10-10-008, D.12-08-044, and D.14-08-030. SDG&E plans to file a motion to request the fund shift in In Home Education in May 2016. 3.
	Pilot[3]	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Fund Shifting Offset[2]	$ (499,405)	$ (2,633,333)	**$ (3,132,739)**	$ -	$ -	**$ -**	$ (499,405)	$ (2,633,333)	**$ (3,132,739)**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Energy Efficiency TOTAL	**$ 10,600,255**	**$ 9,419,440**	**$ 20,019,695**	**$ 7,292,489**	**$ 6,888,255**	**$ 14,180,744**	**$ 3,307,765**	**$ 2,531,186**	**$ 5,838,951**	**$ -**	**$ -**	**$ -**	**$ 54,493**	**$ 12,220**	**$ 66,713**	**$ -**	**$ -**	**$ -**	**$ (66,713)**	0.3%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Training Center	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Inspections	$ 49,603	$ 49,603	$ 99,206	$ 45,404	$ 45,403	$ 90,807	$ 4,199	$ 4,200	**$ 8,399**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. . 3.	1. 2. 3.
	Marketing and Outreach	$ 582,359	$ 582,359	$ 1,164,718	$ 506,954	$ 506,954	$ 1,013,908	$ 75,405	$ 75,405	**$ 150,810**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	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.
	M&E Studies[3]	$ 57,500	$ 57,500	$ 115,000	$ -	$ -	$ -	$ 57,500	$ 57,500	**$ 115,000**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Regulatory Compliance[3]	$ 161,107	$ 161,107	$ 322,214	$ 127,777	$ 127,777	$ 255,554	$ 33,330	$ 33,330	**$ 66,660**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	General Administration[3]	$ 1,003,208	$ 1,003,208	$ 2,006,417	$ 900,238	$ 900,237	$ 1,800,475	$ 102,970	$ 102,971	**$ 205,941**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	CPUC Energy Division[3]	$ 22,500	$ 22,500	$ 45,000	$ 7,054	$ 7,054	$ 14,108	$ 15,446	$ 15,446	**$ 30,892**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	TOTAL PROGRAM COSTS	**$ 12,476,532**	**$ 11,295,718**	**$ 23,772,250**	**$ 8,879,917**	**$ 8,475,680**	**$ 17,355,596**	**$ 3,596,615**	**$ 2,820,038**	**$ 6,416,653**	**$ -**	**$ -**	**$ -**	**$ 54,493**	**$ 12,220**	**$ 66,713**	**$ -**	**$ -**	**$ -**	**$ (66,713)**	**0.3%**				
	Carryforward from 2014 and prior years[6]	$ 10,079,864	$ 9,998,370	$ 20,078,234				$ 10,079,864	$ 9,998,370	$ 20,078,234				$ 10,079,864	$ 9,998,370	$ 20,078,234									
	Carry Back from PY 2016 ($0)	$ -	$ -	$ -				$ -	$ -	$ -															
	TOTAL PROGRAM INCLUDING CARRY FORWARD / CARRY BACK	**$ 22,556,396**	**$ 21,294,087**	**$ 43,850,484**	**$ 8,879,917**	**$ 8,475,680**	**$ 17,355,596**	**$ 13,676,480**	**$ 12,818,408**	**$ 26,494,887**	**$ -**	**$ -**	**$ -**	**$ 10,025,371**	**$ 9,986,150**	**$ 20,011,521**	**$ -**	**$ -**	**$ -**						

Total Carry Forward 2014 unspent funds	**$ 10,079,864**	**$ 9,998,370**	**$ 20,078,234**
Total Shifted during 2015	$ (54,493)	$ (12,220)	$ (66,713)
Remaining Carryforward from 2014 after fund shift for 2015	**$ 10,025,371**	**$ 9,986,150**	**$ 20,011,521**
Footnote 3 Totals not available for fund shift w/out prior written authorization	$ 209,246	$ 209,247	$ 418,493
2015 Unspent Funds	$ 3,441,863	$ 2,623,011	$ 6,064,874
Total Unspent Funds Carry forward into 2016	**$ 13,676,480**	**$ 12,818,408**	**$ 26,494,887**

[1] Numbers reported in standard accounting format, with negative amounts displayed in parentheses ($xxx.xx).
[2] Funding for 2015 is authorized per D.14-08-030 which directs the same funding level authorized for 2014 and includes the fund shift of $3,132,739. The fund shift for 2015 is included in categories above as follows: Appliances ($31,393 Elec / $387,533 Gas); Domestic Hot Water ($8,398 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).
[3] Prior written authorization from the Commission is required before the utilities can shift into or out of these categories.
[4] SDG&E shifted funds in accordance with Section 20 of Funding Shifting Rules set forth in D.08-11-031, as modified by D.10-10-008, D.12-08-044 and D.14-08-030.
[5] This is the month in which the category was over budget. However, SDG&E did not shift any funds until year end 2015.
[6] Carryforward from 2014 and prior years includes approved carryforward fundshifting in D.14-08-030 of $9,398,216 and a budget augmentation for gas in the amount of $3,769,897.
[7] Total Expenditures includes cash discounts applied for payment terms of ($27,908). Cash discounts were initiated in 2015.

San Diego Gas Electric Company

	A	B
1	**PY 2015 Energy Savings Assistance Program Annual Report**	
2	**ESAP Table 13**	
3	**Categorical and Other Enrollment**	
4		
5		
6	**Type of Enrollment**	**Number of customers treated**
7	Women, Infants, and Children Program (WIC)	1,959
8	Supplemental Security Income (SSI)	920
9	CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	1,297
10	CalWORKs/Temporary Assistance for Needy Families (TANF)	146
11	Tribal TANF	-
12	Medicaid/Medi-Cal for Families	2,300
13	Healthy Families A&B	312
14	National School Lunch Program (NSLP) - Free Lunch	530
15	Low-income Home Energy Assistance Program (LIHEAP)	627
16	Bureau of Indian Affairs General Assistance	-
17	Head Start Income Eligible - (Tribal Only)	1
18	Targeted Self Certification	6,268
19	Standard Enrollment	5,849
20	**Total**	**20,209**
21		
22		
23		

PY 2015 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	128,345 kWh 15.47 kW 7,650 therms	N/A	797	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	354 kWh 0.05 kW 77 therms	N/A	2	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	993 kWh 0.12 kW 166 therms	N/A	10	N/A	Y	N/A
Data Sharing	CARE/Medical Baseline	Marketing to customers enrolled in CARE and/or Medical Baseline	No	N/A	None	11,378 kWh 1.38 kW 772 therms	N/A	37	No dollar impact. Effort provided targeted lead generation	N/A	N/A
Data Sharing	CARE High Usage	Automated Lead Generation for CARE High Usage Verification Process	No	N/A	None	327,508 kWh 36.46 kW 16,287 therms	N/A	1146	N/A	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 for measures installation in 2015. 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

PY 2015 Energy Savings Assistance Program Annual Report
ESAP Table 15
Lighting

ESA Program CFL Tracking Table

Instructions: Please identify the CFL bulbs used within your ESA program and fill in the remaining columns for each

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]
CFL	14 Watt			7.36	Yes
CFL	19 Watt			8.58	Yes
CFL	20 Watt			7.25	Yes
CFL	23 Watt			7.48	Yes

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]
2009	20,927	17,653	6	1,796,496
2010	21,593	17,016	7	1,796,176
2011	22,575	17,246	6	1,697,568
2012	22,415	17,046	6	1,772,269
2013	17,568	11,639	6	1,502,883
2014	22,039	20,895	6	2,207,495
2015	20,209	18,724	6	1,856,926

[1] Bulb cost and admin cost were combined effective 2013.

[2] Compliant in regards to: 1) Do bulbs meet or exceed CEC energy efficiency standards for general purpose lighting?
Do all models comply with Europe's RoHS standards on toxicity?

[3] Ordering Paragraph 34 of D.14-08-030 adopts the 2013 ESA Impact Evaluation. The results from that study were used in this Annual Report.

San Diego Gas Electric Company

PY 2015 Energy Savings Assistance Program Annual Report

ESAP Table 16
"Add Back" Measures

			Ratio of Benefits Over Costs					
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**
Room A/C Replacement, MF	10	0.05	0.02	0.04	5	$5,793	$19
Room A/C Replacement, MH	10	0.07	0.03	0.06	12	$10,670	$46
Room A/C Replacement, SF	10	0.06	0.03	0.05	55	$53,108	$218
Duct Testing and Sealing, elec, SF	7	0.51	0.32	0.47	11	$2,085	$54
Duct Testing and Sealing, elec, SF	10	0.56	0.48	0.61	10	$919	$49
Duct Testing and Sealing, gas, MH	7	0.73	0.30	0.38	4	$2,520	$59
Duct Testing and Sealing, gas, MH	10	0.48	0.26	0.35	11	$6,930	$133
Duct Testing and Sealing, gas, SF	7	0.44	0.61	0.66	277	$40,822	$4,120
Duct Testing and Sealing, gas, SF	10	0.84	0.56	0.63	313	$47,710	$3,779
Furnace Repair/Replacement, gas, MF	7	0.79	0.00	0.00	129	$23,146	$0
Furnace Repair/Replacement, gas, MF	10	0.00	0.00	0.00	72	$17,917	$0
Furnace Repair/Replacement, gas, MH	7	0.00	0.00	0.00	165	$105,678	$0
Furnace Repair/Replacement, gas, MH	10	0.00	0.00	0.00	269	$205,582	$0
Furnace Repair/Replacement, gas, MH	15	0.00	0.00	0.00	3	$2,351	$0
Furnace Repair/Replacement, gas, SF	7	0.00	0.00	0.00	1473	$732,135	$0
Furnace Repair/Replacement, gas, SF	10	0.00	0.00	0.00	999	$431,179	$0
Water Heater Repair/Replacemen,elec,MF	10	0.00	0.00	0.00	1	$3	$0
Water Heater Repair/Replacemen,elec,MH	15	0.00	0.00	0.00	1	$33	$0
Water Heater Repair/Replacemen,elec,SF	7	0.00	0.00	0.00	4	$61	$0
Water Heater Repair/Replacemen,gas,MF	7	0.27	0.18	0.20	16	$3,856	$62
Water Heater Repair/Replacemen,gas,MF	10	0.23	0.16	0.17	17	$4,862	$66
Water Heater Repair/Replacemen,gas,MH	7	0.11	0.07	0.08	52	$37,236	$203
Water Heater Repair/Replacemen,gas,MH	10	0.13	0.08	0.09	105	$61,715	$409
Water Heater Repair/Replacemen,gas,MH	15	0.07	0.05	0.05	1	$1,069	$4
Water Heater Repair/Replacemen,gas,SF	7	0.23	0.15	0.17	318	$93,167	$1,239
Water Heater Repair/Replacemen,gas,SF	10	0.23	0.16	0.17	283	$80,732	$1,102
Attic Insulation,gas,MF	7	0.46	0.29	0.37	5	$6,288	$128
Attic Insulation,gas,MF	10	0.60	0.39	0.48	1	$676	$23
Attic Insulation,gas,SF	7	0.51	0.32	0.40	332	$354,723	$8,493
Attic Insulation,gas,SF	10	0.46	0.29	0.37	289	$324,197	$6,552

Notes:
[1] Based on Appendix J.1 and J.2 in D.12-08-044 and D.14-08-030.
[2] Ordering Paragraph 34 of D.14-08-030 adopts the 2013 ESA Impact Evaluation. The results from that study were used in this Annual Report.

San Diego Gas Electric Company

PY 2015 CARE Annual Report

CARE Table 1

Overall Program Expenses

	A	B	C	D	E	F	G	H
4	Category	Overall Expenditures		Total	Authorized Budget	% of Budget Spent	Total Shifted[1]	Shifted to/from?
5		Electric	Gas					
6	Outreach[3]	$2,128,095	$415,698	$2,543,793	$2,300,352	111%	$243,441 - Increased Third Party CARE Outreach activities to support improved program enrollment	Shifted $220,689 from both Processing, Certification, Recertification and $22,752 from Post Enrollment Verification
7	Processing, Certification, Recertification	$350,743	$71,773	$422,517	$643,206	66%	($220,689)	Shifted to Outreach
8	Post Enrollment Verification	$247,184	$49,900	$297,084	$403,200	74%	($72,377)	Shifted $9,000 to Pilots and $40,625 to Regulatory Compliance, and $22,752 to Outreach
9	IT Programming	$895,281	$178,808	$1,074,088	$1,230,082	87%	($96,457)	Shifted to General Administration
10	Cool Centers	$30,745	$5,146	$35,891	$35,985	100%		
11	Pilots[2]	$99,547	$19,613	$119,160	$110,160	108%	$9,000 - The CHANGES pilot invoice for October 2014 was submitted in 2015, causing one extra month billing in PY2015.	Shifted from Post Enrollment Verification
12	Measurement & Evaluation	$0	$0	$0	$22,500	0%		
13	Regulatory Compliance	$171,464	$34,523	$205,987	$165,362	125%	$40,625 - Additional compliance support was needed to handle increased compliance activities	Shifted from Post Enrollment Verification
14	General Administration	$513,347	$101,517	$614,863	$518,406	119%	$96,457 - Increased administration support was needed to support new initiatives, such as High Usage Verification	Shifted to General Administration from IT Programming
15	CPUC Energy Division	$27,948	$4,972	$32,920	$56,712	58%		
16								
17	**TOTAL Program Costs**	**$4,464,353**	**$881,950**	**$5,346,303**	**$5,485,965**	**97%**		
18								
19	CARE Rate Discount	$66,508,281	$9,940,667	**$76,448,948**	$83,614,933	91%		
20	Service Establishment Charge Discount	$0	$0	**$0**	$0	0%		
21								
22	**TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS**	**$70,972,634**	**$10,822,617**	**$81,795,251**	**$89,100,898**	**92%**		
23								
24	[1] Fund shifting amount and details							
25	[2] CHANGES Pilot							
26	[3] Manually adjusted Outreach by -$20,780 to account for over-payment of contractor captitation fees (applied PY2015 average elec/gas split of 83% / 17%) Elec = -$17,247.40, Gas = -$3,532.60							
27								

San Diego Gas Electric Company

PY 2015 CARE Annual Report

CARE Table 2

Enrollment, Recertification, Attrition, & Penetration

	New Enrollment										Recertification				Attrition					Enrollment				
	Automatic Enrollment				Self-Certification (Income or Categorical)																			
	Inter-Utility [1]	Intra-Utility [2]	Leveraging [3]	Combined (B+C+D)	Online	Paper	Phone	Combined (F+G+H)	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)	Total CARE Participants	Estimated CARE Eligible	Penetration Rate % (W/X)
January	0	194	5	199	1,707	1,849	727	4,283	374	4,856	3,008	1,405	3,253	7,666	2,191	161	82	2,521	4,955	12,522	-99	278,832	370,088	75%
February	0	11	0	11	1,685	2,396	655	4,736	345	5,092	3,217	1,180	2,936	7,333	4,057	140	79	3,320	7,596	12,425	-2,504	276,328	370,088	75%
March	0	437	0	437	2,167	2,673	710	5,550	356	6,343	2,579	2,322	3,212	8,113	2,874	119	130	6,837	9,960	14,456	-3,617	272,711	370,088	74%
April	0	169	11	180	1,313	2,708	466	4,487	345	5,012	2,262	1,703	3,466	7,431	476	24	58	5,782	6,340	12,443	-1,328	271,383	370,088	73%
May	1	108	0	109	1,129	2,169	487	3,785	235	4,129	1,752	1,932	4,799	8,483	1,066	29	49	3,496	4,640	12,612	-511	270,872	370,088	73%
June	98	226	3	327	1,368	2,244	730	4,342	269	4,938	1,840	2,016	3,405	7,261	1,084	44	58	2,568	3,754	12,199	1,184	272,056	370,088	74%
July	0	179	4	183	1,854	2,628	649	5,131	308	5,622	2,348	2,439	2,989	7,776	1,271	72	66	4,583	5,992	13,398	-370	271,686	370,088	73%
August	1	126	2	129	2,077	3,053	654	5,784	387	6,300	1,584	2,417	3,323	7,324	1,543	64	45	4,150	5,802	13,624	498	272,184	370,088	74%
September	0	194	0	194	2,113	2,191	644	4,948	422	5,564	1,686	2,911	3,439	8,036	1,539	48	80	3,796	5,463	13,600	101	272,285	370,088	74%
October	0	349	7	356	1,819	2,422	531	4,772	320	5,448	1,883	3,043	4,288	9,214	1,020	61	78	4,515	5,674	14,662	-226	272,059	370,088	74%
November	0	229	3	232	1,872	1,886	544	4,302	253	4,787	1,553	4,776	3,624	9,953	2,114	59	56	2,651	4,880	14,740	-93	271,966	370,088	73%
December	0	415	2	417	1,588	2,885	474	4,947	302	5,666	1,538	4,161	3,209	8,908	2,262	118	128	3,877	6,385	14,574	-719	271,247	370,088	73%
YTD Total	**100**	**2,637**	**37**	**2,774**	**20,692**	**29,104**	**7,271**	**57,067**	**3,916**	**63,757**	**25,250**	**30,305**	**41,943**	**97,498**	**21,497**	**939**	**909**	**48,096**	**71,441**	**161,255**	**-7,684**	**271,247**	**370,088**	**73%**

[1] Enrollments via data sharing between the IOUs.

[2] Enrollments via data sharing between departments and/or programs within the utility.

[3] Enrollments via data sharing with programs outside the IOU that serve low-income customers.

[4] No response includes no response to both Recertification and Verification.

[5] Includes customers who closed their accounts, requested to be removed, or were otherwise ineligible for the program.

San Diego Gas Electric Company

PY 2015 CARE Annual Report								
CARE Table 3A - Post-Enrollment Verification Results (Model) 2015								
2015	Total CARE Households Enrolled	Households Requested to Verify [1,4]	% of CARE Enrolled Requested to Verify	CARE Households De-Enrolled (Due to no response)	CARE Households De-Enrolled (Verified as Ineligible)	Total Households De-Enrolled [2]	% De-enrolled through Post Enrollment Verification [3]	% of Total CARE Households De-Enrolled
January	278,832	163	0.1%	70	21	91	56%	0.0%
February	276,328	0	0.0%	0	0	0	0%	0.0%
March	272,711	0	0.0%	0	0	0	0%	0.0%
April	271,383	565	0.2%	271	52	323	57%	0.1%
May	270,872	3,013	1.1%	1,354	297	1,651	55%	0.6%
June	272,056	880	0.3%	442	88	530	60%	0.2%
July	271,686	1,047	0.4%	510	92	602	57%	0.2%
August	272,184	2,378	0.9%	1,171	221	1,392	59%	0.5%
September	272,285	1,332	0.5%	710	108	818	61%	0.3%
October	272,059	3,025	1.1%	1,675	255	1,930	64%	0.7%
November	271,966	2,058	0.8%	1,112	151	1,263	61%	0.5%
December	271,247	2,054	0.8%	594	107	701	34%	0.3%
YTD Total	**271,247**	**16,515**	**6.1%**	**7,909**	**1,392**	**9,301**	**56%**	**3.4%**

[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.

[4] The remaining customers that did not Respond or Drop as Ineligible are those customers that have a CARE program status such as new enrollment, high user, or verification or recertificaton in process.

CARE Table 3B - Post-Enrollment Verification Results (High Usage)[2]								
2015								
2015	Total CARE Households Enrolled	Households Requested to Verify [4]	% 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 [3]	% De-enrolled through Post Enrollment Verification	% of Total CARE Households De-Enrolled
January	278,832	257	0.1%	17	156	173	67%	0.1%
February	276,328	890	0.3%	6	469	475	53%	0.2%
March	272,711	233	0.1%	0	87	87	37%	0.0%
April	271,383	253	0.1%	3	83	86	34%	0.0%
May	270,872	212	0.1%	20	45	65	31%	0.0%
June	272,056	222	0.1%	64	27	91	41%	0.0%
July	271,686	397	0.1%	120	72	192	48%	0.1%
August	272,184	787	0.3%	277	224	501	64%	0.2%
September	272,285	1,640	0.6%	644	581	1,225	75%	0.4%
October	272,059	2,478	0.9%	1,683	228	1,911	77%	0.7%
November	271,966	584	0.2%	400	34	434	74%	0.2%
December	271,247	249	0.1%	94	6	100	40%	0.0%
YTD Total	**271,247**	**8,202**	**3.0%**	**3,328**	**2,012**	**5,340**	**65%**	**2.0%**

[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] High usage is defined as a customer that exceeds 400% or 600% of baseline.

[3] Verification results are tied to the month initiated and the verification process allows customers 60 days to respond to the High Use Request process. Results may be pending due to the time permitted for a participant to respond.

[4] The remaining customers that did not Respond or Drop as Ineligible are those customers that have a CARE program status such as new enrollment, high user, or verification or recertificaton in process.

San Diego Gas Electric Company

	A	B	C	D	E	F	G
1	**PY 2015 CARE Annual Report**						
2	**CARE Table 4**						
3	**CARE Self-Certification and Self-Recertification Applications[1]**						
4		**Provided[2]**	**Received**	**Approved[3]**	**Denied**	**Pending/ Never Completed**	**Duplicates**
5	**Total**	2,363,674	148,101	118,867	8,639	157	20,438
6	**Percentage**		100%	80%	6%	0%	14%
7							
8							
9							
10							
11	[1] Includes sub-metered customers.						
12	[2] Includes number of applications (paper, internet, and phone) SDG&E provided for all direct mailing campaigns, email campaigns, phone enrollment campaigns, and other outreach methods. Because there are other means by which customers obtain applications which are not counted, this number is only an approximation and it reflects duplicate applications provided through marketing and outreach efforts.						
13	[3] Includes new enrollments and recertification applications approved.						

San Diego Gas Electric Company

	A	B	C	D	E	F	G	H	I	J
1	**PY 2015 CARE Annual Report**									
2	**CARE Table 5**									
3	**CARE Enrollment by County**									
4	**County**	**Estimated Eligible**			**Total Participants**			**Penetration Rate**		
5		**Urban**	**Rural [1]**	**Total**	**Urban**	**Rural**	**Total**	**Urban**	**Rural**	**Total**
6	Orange	19,822	0	19,822	10,479	0	10,479	53%	0%	53%
7	San Diego	341,880	8,386	350,266	254,956	5,812	260,768	75%	69%	74%
8	**Total**	**361,702**	**8,386**	**370,088**	**265,435**	**5,812**	**271,247**	**73%**	**69%**	**73%**
9										
10										
11	[1] Rural includes zip codes classified as such according to the Goldsmith modification that was developed to identify small towns									
12	and rural areas within large metropolitan counties.									
13										

San Diego Gas Electric Company

PY 2015 CARE Annual Report
CARE Table 6

CARE Recertification Results

2015	Total CARE Population	Participants Requested to Recertify [1,5]	% of Population Total	Participants Recertified [2]	Participants Dropped [2, 3]	Recertification Rate % (E/C) [4]	% of Total Population Dropped (F/B)
January	278,832	3,242	1%	1,597	1,022	49%	0.4%
February	276,328	3,002	1%	1,418	1,052	47%	0.4%
March	272,711	3,566	1%	1,704	1,221	48%	0.4%
April	271,383	3,819	1%	1,857	1,292	49%	0.5%
May	270,872	2,698	1%	1,402	874	52%	0.3%
June	272,056	3,944	1%	2,040	1,311	52%	0.5%
July	271,686	2,930	1%	1,564	1,043	53%	0.4%
August	272,184	3,260	1%	1,649	1,198	51%	0.4%
September	272,285	3,248	1%	1,657	1,266	51%	0.5%
October	272,059	3,794	1%	1,949	1,531	51%	0.6%
November	271,966	4,048	1%	2,078	1,687	51%	0.6%
December	271,247	3,352	1%	1,415	253	42%	0.1%
YTD Total	**271,247**	**40,903**	**15%**	**20,330**	**13,750**	**50%**	**5.1%**

[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. Results may be pending due to the time permitted for a participant to respond.

[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 status who had not yet responded to the recertification request.

[5] The remaining customers that did not Respond or Drop as Ineligible are those customers that have a CARE program status such as new enrollment, high user, or verification or recertificaton in process.

San Diego Gas Electric Company

	A	B	C	D	E	F	G	H
1	**PY 2015 CARE Annual Report**							
2	**CARE Table 7**							
3	**CARE Capitation Contractors**							
4	**Contractor Name [1]**	**Contractor Type (Check one or more if applicable)**				**Enrollments[2]**		
5		**Private**	**CBO**	**WMDVBE**	**LIHEAP**	**Rural**	**Urban**	**Total**
6	211 Phone Enrollment	0	X	0	0	0	2,879	2,879
7	African Alliance	0	X	0	0	0	80	80
8	American Red Cross	0	X	0	0	0	170	170
9	Bayside Community Center	0	X	X	0	0	3	3
10	Catholic Charities	0	X	0	0	0	25	25
11	Children's Initiative	0	X	0	0	0	1	1
12	Chula Vista Community Collaborative	0	X	0	0	0	19	19
13	Community Resource Center	0	X	0	0	0	3	3
14	Crisis House	0	X	0	0	0	2	2
15	Hearts and Hands Together	0	X	0	0	0	42	42
16	Horn of Africa	0	X	0	0	0	2	2
17	Interfaith Community Services	0	X	0	0	0	1	1
18	La Masestra Family Clinic	0	X	0	0	0	130	130
19	MAAC Project	0	0	0	X	0	153	153
20	National Asian American Coalition	0	X	0	0	0	0	0
21	Neighborhood Health Care	0	X	0	0	0	18	18
22	Network of Myanmar American Association	0	X	0	0	0	0	0
23	North County Health Project	0	X	0	0	0	163	163
24	San Diego State University - WIC	0	X	0	0	0	85	85
25	Scripps Health - WIC	0	X	0	0	0	36	36
26	Servicentro San Clemente, Inc.	X	0	0	0	0	102	102
27	Vista Community Clinic	0	X	0	0	0	2	2
28	YMCA Youth	0	X	0	0	0	0	0
29	**Total Enrollments and Expenditures[3]**					**0**	**3,916**	**3,916**
30								
31								
32	[1] All capitation contractors with current contracts are listed regardless of whether they have signed up customers or submitted invoices this year.							
33	[2] Enrollments reflect new enrollments only.							
34	[3] Total Captitation Expenditures include 2014 enrollments paid in 2015.							

San Diego Gas Electric Company

	A	B	C	D	E	F	G	H
1	**PY 2015 CARE Annual Report**							
2	**CARE Table 8**							
3	**CARE Participants as of Month-End**							
4	**2015**	**Gas and Electric**	**Gas Only**	**Electric Only**	**Total**	**Eligible Households**	**Penetration Rate**	**% Change**
5	**January**	181,588	N/A	97,244	278,832	370,088	75%	0.0%
6	**February**	179,933	N/A	96,395	276,328	370,088	75%	-0.9%
7	**March**	176,776	N/A	95,935	272,711	370,088	74%	-1.3%
8	**April**	175,406	N/A	95,977	271,383	370,088	73%	-0.5%
9	**May**	175,209	N/A	95,663	270,872	370,088	73%	-0.2%
10	**June**	175,476	N/A	96,580	272,056	370,088	74%	0.4%
11	**July**	174,582	N/A	97,104	271,686	370,088	73%	-0.1%
12	**August**	174,803	N/A	97,381	272,184	370,088	74%	0.2%
13	**September**	174,705	N/A	97,580	272,285	370,088	74%	0.0%
14	**October**	174,665	N/A	97,394	272,059	370,088	74%	-0.1%
15	**November**	175,010	N/A	96,956	271,966	370,088	73%	0.0%
16	**December**	175,447	N/A	95,800	271,247	370,088	73%	-0.3%
17								
18								

San Diego Gas Electric Company

	A	B	C	D	E
1	**PY 2015 CARE Annual Report**				
2	**CARE Table 9**				
3	**CARE Average Monthly Usage & Bill**				
4					
5	**Average Monthly Gas / Electric Usage**				
6	**Residential Non-CARE vs. CARE Customers**				
7	**Customer**	**Gas Therms**	**Gas Therms**	**Total**	
8		**Tier 1**	**Tier 2**		
9	Non-CARE	21.4	0.5	21.9	
10	CARE	18.4	0.3	18.7	
11	**Customer**	**Electric KWh**	**Electric KWh**	**Total**	
12		**Tier 1**	**Tier 2 and Above**		
13	Non-CARE	245	295	540	
14	CARE	270	205	475	
15					
16					
17	**Average Monthly Gas / Electric Bill[2]**				
18	**Residential Non-CARE vs. CARE Customers[1]**				
19	**(Dollars per Customer)**				
20	**Customer**	**Gas**	**Electric**		
21	Non-CARE	$28.09	$111.18		
22	CARE	$18.76	$53.09		
23					
24					
25	[1] Excludes master-meter usage.				
26	[2] Average Monthly Gas/Electric Bill reflects residential Non-CARE (CARE) 2015 total billed				
27	revenues divided by the average number of Non-CARE (CARE) 2015 monthly bills.				
28					
29					

San Diego Gas Electric Company

	A	B	C	D	E	F
1	**PY 2015 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	$3.00	$110	2.70%	$36,103,127	30.97%
9	Commercial	$27.76	$894	3.10%	$49,017,989	42.05%
10	Agricultural	$43.61	$1,087	4.00%	$2,071,822	1.78%
11	Large/Indust	$3,652.38	$65,222	5.60%	$29,376,121	25.20%
12						
13						
14						
15	**GAS**					
16	**CARE Surcharge and Revenue Collected by Customer Class**					
17					Total CARE	Percentage of
18	Customer	Average Monthly		CARE Surcharge	Surcharge Revenue	CARE Surcharge
19	Class	CARE Surcharge[2]	Monthly Bill	as Percent of Bill	Collected	Revenue Collected
20	Residential	$0.85	$27	3.10%	$6,686,471	43.06%
21	Commercial	$18.28	$286	6.40%	$6,577,333	42.35%
22	Natural Gas Vehicle	$1,611.92	$11,397	14.10%	$630,262	4.06%
23	Industrial	$2,734.94	$2,992	91.40%	$1,635,496	10.53%
24						
25	[1] Excludes CARE customers. Pursuant to D. 15-07-001, OP 4 and Section 11.1.1 authorizes adjustments to CARE to transition to the legislatively-mandated CARE discount range in compliance with Section 739.1 were authorized. Effective 9/1/15 per AL 2783-E, CARE customers receive non-CARE rates; therefore, there is no longer a CARE Rate subsidy.					
26	[2] Excludes CARE customers.					

San Diego Gas Electric Company

	A	B	C	D	E	F
1	**PY 2015 CARE Annual Report**					
2	**CARE Table 11**					
3	**CARE Capitation Applications[1]**					
4	**Entity**	**Total Received**	**Approved[2]**	**Denied**	**Pending/ Never Completed**	**Duplicate**
5	211 Phone Enrollment	6,325	4,398	149	2	1,776
6	African Alliance	97	83	1	0	13
7	American Red Cross	282	247	13	0	22
8	Bayside Community Center	9	8	0	0	1
9	Catholic Charities	39	35	1	0	3
10	Children's Initiative	2	2	0	0	0
11	Chula Vista Community Collaborative	34	30	1	0	3
12	Community Resource Center	5	4	0	0	1
13	Crisis House	23	18	2	0	3
14	Hearts and Hands Together	129	117	3	0	9
15	Horn of Africa	11	9	0	0	2
16	Interfaith Community Services	2	2	0	0	0
17	La Masestra Family Clinic	446	327	33	0	86
18	MAAC Project	263	203	7	0	53
19	National Asian American Coalition	0	0	0	0	0
20	Neighborhood Health Care	38	33	0	0	5
21	Network of Myanmar American Association	0	0	0	0	0
22	North County Health Project	314	253	24	0	37
23	San Diego State University - WIC	166	136	13	0	17
24	Scripps Health - WIC	61	52	3	0	6
25	Servicentro San Clemente, Inc.	126	114	6	0	6
26	Vista Community Clinic	4	2	0	0	2
27	YMCA Youth	0	0	0	0	0
28	**Total**	**8,376**	**6,073**	**256**	**2**	**2,045**
29						
30	[1] Includes sub-metered customers.					
31	[2] Includes new enrollments and recertification applications approved.					

San Diego Gas Electric Company

	A	B	C	D	E	F	G
1	PY 2015 CARE Annual Report						
2	CARE Table 12						
3	CARE Expansion Program						
4							
5	Participating Facilities by Month						
6	2015	Gas			Electric		
7		CARE Residential Facilities	CARE Commercial Facilities	Total Gas	CARE Residential Facilities	CARE Commercial Facilities	Total Electric
8	January	310	132	442	552	224	776
9	February	310	132	442	552	224	776
10	March	310	133	443	549	229	778
11	April	310	133	443	550	229	779
12	May	309	133	442	552	229	781
13	June	310	134	444	555	230	785
14	July	310	134	444	555	230	785
15	August	310	134	444	555	230	785
16	September	310	134	444	554	231	785
17	October	310	135	445	551	232	783
18	November	310	135	445	549	235	784
19	December	310	135	445	549	235	784
20							
21							
22	Average Monthly Gas / Electric Usage[1]						
23	Customer	Gas	Electric				
24		Therms	KWh				
25	Residential Facilities	27	452				
26	Commercial Facilities	263	7,266				
27							
28							
29	CARE Expansion Self-Certification and Self-Recertification Applications						
30		Received	Approved	Denied	Pending/Never Completed	Duplicates	
31	Total	8	6	2	0	0	
32	Percentage		75%	25%	0%	0%	
33							
34							
35	[1] Excludes master meter usage.						

PY 2015 CARE Annual Report

CARE Table 13

CARE High Usage Verification Results[5]

	Stage 1 - IRS Documentation and ESA Agreement				Stage 2 - ESA Participation			Stage 3 - Usage Monitoring		
	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
	8,202	3,328	2,012	2,878	255	1,543	1,080	54	10	7

[1] Includes customers who were verified as over income, requested to be removed, or did not agree to participate in ESA Program.

[2] Includes customers who declined to participate in ESA Program, failed to respond to appointment requests, or missed multiple appointments or denied access to all rooms.

[3] Includes customers who previously participated in ESA Program, did not meet the three-measure minimum, landlord refused, etc. These customers move directly to Stage 3.

[4] Customers removed for exceeding 600% of baseline in any monthly billing cycle.

[5] High usage is defined as a customer that exceeds 400% or 600% of baseline.

San Diego Gas Electric Company

	A	B
1	**PY 2015 CARE Annual Report**	
2	**CARE Table 14**	
3	**Categorical Enrollment**	
4		
5		
6	**Type of Enrollment**	**Number of Customer Enrollments[1]**
7	Bureau of Indian Affairs General Assistance	117
8	CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	23,720
9	CalWORKs/Temporary Assistance for Needy Families (TANF) [2]	3,397
10	Head Start Income Eligible - (Tribal Only)	572
11	Healthy Families A&B	11,118
12	Low-income Home Energy Assistance Program (LIHEAP)	3235
13	Medicaid/Medi-Cal	43,924
14	National School Lunch Program (NSLP) - Free Lunch	13,463
15	Supplemental Security Income (SSI)	9,037
16	Tribal TANF [2]	0
17	Women, Infants, and Children Program (WIC)	15,531
18		
19		
20		
21	[1] Number of customers enrolled reflects categorical programs selected by customer. Customers may select more than one eligible program for a single account.	
22	[2] CalWORKS and Tribal TANF are combined categorical programs with no distinction between the two programs.	