



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

JANUARY 2004 – DECEMBER 2004

May 2, 2005

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CARE PROGRESS REPORT

RESIDENTIAL AND EXPANDED PROGRAMS

January 1, 2004 through December 31, 2004

CARE RESIDENTIAL PROGRAM

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

I. Participant Information:

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

See Tables 1.1 and 1.2.

Table 1.1 Residential CARE Program Gas Customers by Month		
PY2004	Total CARE Participants	Percentage Change
January	123,137	-
February	123,895	0.6%
March	126,874	2.4%
April	127,383	0.4%
May	126,030	-1.1%
June	125,670	-0.3%
July	125,276	-0.3%
August	126,117	0.7%
September	126,627	0.4%
October	128,216	1.3%
November	129,504	1.0%
December	129,508	0.0%

Table 1.2 Residential CARE Program Electric Customers by Month		
PY2004	Total CARE Participants	Percentage Change
January	183,429	-
February	184,292	0.5%
March	188,595	2.3%
April	189,293	0.4%
May	187,113	-1.2%
June	186,928	-0.1%
July	187,003	0.0%
August	188,092	0.6%
September	188,025	0.0%
October	190,593	1.4%
November	192,889	1.2%
December	192,444	-0.2%

Net increases over PY2003 participation at year-end for gas and electric CARE programs were 8,638, or 7%, and 11,416, or 6%, respectively.

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

No monthly variance of 5% or more in the number of participants occurred in PY2004.

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

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

CARE eligibility was developed using an implicitly adjusted 1999 distribution of household income obtained from Census 2000 SF3 income data and 2004 estimates of household size obtained from Applied Graphics Systems (AGS). Eligibility was developed separately for San Diego County and Orange County by zip code. Calculation of the eligibility rate is being shown as a percentage for each fuel source. The methodology used was consistent with the Assigned Commissioner's Ruling (ACR) dated 12/27/02 and the methodology recommended by the Reporting Requirements Manual (RRM) Working Group in its October 2,

2000 Report for Low Income Assistance Programs and approved by the Commission in D. 01-03-028.

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

A count of all active residential meters and residential submetered units, minus residential accounts with billing tariffs that do not qualify for CARE, was undertaken to derive the number of residential eligible meters (i.e., households) by fuel source using SDG&E's customer information system. By using tariff rates as the criteria for counting, all non-eligible master-metered accounts were not included in the count.

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

Estimated CARE eligible rates by fuel source, developed as described in B.1 above, were applied to the count of current CARE-eligible meters, developed as described in B.2 above, to estimate the number of CARE-eligible households in SDG&E's service territory.

4. Describe how current CARE customers were counted.

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

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

The formula for calculating CARE-participation rates is:

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

The formula was used to determine the CARE-participation rates by energy source and was not changed during PY2004.

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

See Tables 2.1 and 2.2.

TABLE 2.1			
CARE Residential Penetration Rate			
Gas			
2004 Quarter Ending	CARE Residential Customers	CARE-Eligible Customers	CARE Penetration Rate
31-Mar	126,874	178,580	71.0%
30-Jun	125,670	179,045	70.2%
30-Sep	126,627	179,411	70.6%
31-Dec	129,508	179,640	72.1%

TABLE 2.2			
CARE Residential Penetration Rate			
Electric			
2004 Quarter Ending	CARE Residential Customers	CARE-Eligible Customers	CARE Penetration Rate
31-Mar	188,595	263,619	71.5%
30-Jun	186,928	264,545	70.7%
30-Sep	188,025	264,857	71.0%
31-Dec	192,444	265,392	72.5%

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

System Wide Gas Rate – 22.65%
System Wide Electric Rate – 22.65%

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

Total Gas Customers -	32,468	Total Eligible Gas -	7,355
Total Electric Customers -	37,679	Total Eligible Electric -	8,531

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

Gas -	8,309
Electric -	9,078

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

Gas -	113%
Electric -	106%

SDG&E attributes the higher than estimated eligible participation to the probability that sub-metered tenants are more likely than the general population (from which the rate of eligibility is derived) to be income qualified for CARE.

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

SDG&E noted some confusion for managers/owners of master-metered facilities in understanding the difference between the SB920 notice (see Section IV) and the CARE annual recertification process for submetered tenants. Facility managers were calling and faxing requests to provide CARE applications to all tenants. The CARE processing group was able to inform the facility manager that only new tenants needed to return the CARE application and that existing CARE participants would be noticed at a later date of the renewal process. This eliminated unnecessary processing of duplicate applications for tenants already participating in the program. SDG&E will be making changes to the 2005 notice to make sure managers are not confused by the notice.

II. Usage and Bill Information

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

See Table 3.

TABLE 3¹			
Average Monthly Gas/Electric Usage Residential Non-CARE vs. CARE Customers			
Residential Customer	Gas Therms Baseline	Gas Therms Non-Baseline	Total
Non-CARE	23	9	32
CARE	21	6	27
Residential Type	Electric kWh Baseline	Electric kWh Non-Baseline	Total
Non-CARE	300	213	512
CARE	275	94	369

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

See Table 4.

TABLE 4¹		
Average Monthly Gas/Electric Bill Residential Non-CARE vs. CARE Customers (Dollars per Customer)		
Customer	Gas	Electric
Non-CARE	\$33.32	\$77.93
CARE	\$20.08	\$38.51

¹ Information contained in tables 3 and 4 from query of SDG&E's billing data.

III. Program Costs²

A. Discount Cost

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

Average Gas Discount -	\$ 4.51
Average Electric Discount -	\$10.86

2. State the annual subsidy (discount) for all CARE customers by energy source.³

Annual Gas Subsidy –	\$ 7,937,367
Annual Electric Subsidy -	\$23,677,433

B. Administrative Cost

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

See Table 5.

² Information on average discount amount is derived from query of SDG&E's billing data.

³ Information on annual subsidy amount from SDG&E's revenue reports which support the CARE balancing account rather than from billing data.

TABLE 5	
CARE Residential Program	
CARE Costs and Reporting Classifications	
Category	Cost
Capitation Outreach	\$6,732
Outreach	\$1,381,442
Automatic Enrollment	\$20,040
Processing, Certification and Verification	\$177,292
Billing System/Programming	\$74,005
Measurement and Evaluation	\$199,797
Regulatory Compliance	\$98,948
General Administration	\$207,596
Indirect Costs ¹	\$581,376
LIOB Funding	\$0
CPUC Energy Division Staff Funding	\$38,624
Total Program Costs	\$2,785,853
Subsidies and Benefits	\$31,614,800
TOTAL PROGRAM COSTS AND CUSTOMER DISCOUNTS	\$34,400,654

1 SDG&E CARE recorded expenditures reflect \$264,076 in electric and \$80,663 in gas for a total of \$344,760 in indirect costs (pension and benefits, workman's compensation, incentive compensation, liability insurance, fleet and procurement overheads). However, these cost are not included in the CARE balancing account as a result of SDG&E's Cost of Service proceeding per Commission Decision 04-12-015.

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

Outreach: Costs included in outreach include bill inserts; advertising; the printing and mailing of applications; posters; brochures; direct mailings; postage; sub-meter, non-profit and agricultural housing outreach; call center labor; staff labor; out-bound dialing; and toll-free customer call numbers.

Capitation Outreach: Third party, community based outreach conducted under contract to the utility.

Automatic Enrollment: Cost category reflects information technology staff costs associated with the automatic enrollment of the Department of Community Services' (DCSD) Low Income Home Energy Assistance Program (LIHEAP) clients onto SDG&E's CARE program.

Processing, Certification and Verification: Costs included in this category include staff labor; application processing; training labor; and sub-meter certification.

Billing System/Programming: These costs include manual rebilling and programming costs, other than that for automatic enrollment.

Measurement and Evaluation: Costs for measurement and evaluation efforts, such as contract and staff labor expenses for the Needs Assessment Study, customer satisfaction surveys, focus groups and CARE participant eligibility updates.

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

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

LIOB Funding: Costs for hosting LIOB meetings.

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

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

Gas –	\$ 1,896,481 Overcollection
Electric -	\$ 7,241,404 Overcollection

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

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

CARE program costs are recovered via the public purpose programs (PPP) rate component for electric costs and the tax surcharge PPP rate for gas costs.

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

See Tables 6.1 and 6.2.

TABLE 6.1 GAS CARE Surcharge and Revenue Billed by Customer Class					
Customer Class (1)	Bill (2)	CARE Surcharge			
	Avg. Monthly	Avg. Monthly	% of Bill	Billed (3)	% of Billed
CORE Residential	\$36	\$1	1.1%	\$3,793,787	50.9%
CORE Commercial / Industrial	\$389	\$8	2.0%	\$2,755,633	37.0%
CORE Natural Gas Vehicles	\$1,797	\$52	2.9%	\$158,339	2.1%
	\$23,576	\$492	2.1%	\$748,293	10.0%
Total				\$7,456,052	100%

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

(2) Includes PPP Surcharge funds.

(3) Funds billed per the tax surcharge PPP rate (Schedule G-PPPS) for payment to California Board of Equalization (BOE).

TABLE 6.2 ELECTRIC CARE Surcharge and Revenue Billed by Customer Class					
<u>Customer Class</u>	<u>Bill (1)</u>	<u>CARE Surcharge</u>			
	Avg. Monthly	Avg. Monthly	% of Bill	Billed (2)	% of Billed
Residential					
-Individual	\$74	\$1	1.3%	\$11,469,320	33.8%
-Master Metered	\$431	\$7	1.7%	\$442,180	1.3%
Commercial	\$570	\$12	2.1%	\$19,700,018	58.1%
Industrial	\$34,016	\$237	0.7%	\$1,861,923	5.5%
Agricultural	\$583	\$10	1.6%	\$450,580	1.3%
Total				\$33,924,021	100%

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

(2) Funds billed per the public purpose programs (PPP) rate component.

IV. Outreach

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

1. Utility Outreach Activity

For month-by-month details on SDG&E's media efforts and community outreach, please see Attachments A and B, "PY2004 SDG&E CARE Media Outreach" and "SDG&E CARE Outreach and Leveraging Through December 2004."

2004 Annual Notification – SDG&E's annual notification for 2004 occurred between June and July. During this same time period when applications were mailed with customer bills, Energy Notes, a newsletter bill insert, featured an article in English and Spanish informing customers about the program and the new income guidelines. SDG&E also supported the bill insert with a media campaign that included television, radio and print in multiple languages. Of the nearly one million applications distributed, 4,885 customer applications were returned.

Quarterly Bill Message - A printed quarterly CARE bill message in English and Spanish was included on bills for February, May, August and November.

Customer Contact Employees – SDG&E continues to offer CARE through its customer call center and bill payment offices. Customer Service Representatives (CSRs) advise all turn-on customers and customers inquiring about a past-due account or high bill about the program. In PY2004, CSRs requested approximately 83,000 applications be mailed to potentially CARE-eligible customers. Customers returned 37,857 of these applications.

Interactive Voice Response (IVR) Information on Hold – The messages heard by customers waiting for help on telephone inquiries provides information about the CARE program in both English and Spanish. In 2004, the system was updated to give customers the option to order CARE applications directly from the IVR without having to speak to a customer service representative. Approximately 6,500 customers requested applications using the IVR system.

Field Collections – Field collectors provide CARE applications when delivering notices to customers facing disconnect. Approximately 800 customer applications were received from field collectors' efforts in 2004.

Collection Call – SDG&E provides an additional outbound telephone call with a follow-up letter to low-income customers faced with collection activity on their account. Information about the availability of payment

arrangements and customer assistance programs is given, and the customer is urged to call SDG&E for more information.

Bilingual Employees – SDG&E's Customer Call Center and most company business offices are staffed with bilingual (English/Spanish) Customer Service Representatives (CSRs) to ensure that most customers have access to information about utility services. Requests from Spanish-speaking customers make up nearly 17% of the applications requested through the telephone center and company offices. In addition to Spanish-speaking CSRs, the telephone center is also staffed with CSRs who speak Vietnamese, Chinese and Korean. The CARE processing group is also bilingual in English and Spanish. Additionally, SDG&E contracts with AT&T's language services organization to provide in-language support to customers whose language is not spoken by SDG&E CSRs. The service offers interpreter service for different languages and dialects that includes, but is not limited to, French, German, Italian, Japanese, Russian and Tagalog. SDG&E representatives stay on the telephone line with the customer and connect the customer to the interpreter for translation.

Media – SDG&E supported selected direct mail efforts and the annual CARE notification with targeted mass media campaigns that included English and Spanish television advertisements, Spanish radio spots, and English, Spanish and Asian print ads. SDG&E enrolled 511 customers from the print advertisements. Enrollment from the television and radio campaigns was not tracked, however a special toll-free phone number was listed on the television campaign to try and track response. SDG&E received approximately 2,500 calls on this toll-free number.

Direct Mail – SDG&E continued direct mail efforts utilizing census data information targeting potentially eligible customers in low-income areas. Over 215,000 applications were mailed in 2004. Of the applications mailed, SDG&E received a 9% response rate and enrolled 7%, or 15,737 customers onto the program. SDG&E views these response rates very favorably because generally held knowledge estimates that response rates typically range from 2% - 3%.

Community Events – Throughout PY2004, SDG&E participated in over 150 local community events throughout San Diego County to provide information on CARE and other customer assistance programs. Types of events included presentations to community groups, health and safety fairs, community resource fairs, and branch offices, with several events geared toward active duty military customers. Many of the events were leveraged with the Residential Lighting Turn-In Program which was targeted to hard-to-reach residential customers. At these events information on CARE and other programs was available to customers and included CARE applications. SDG&E representatives also assisted customers in completing CARE applications.

Community Outreach - In 2004 SDG&E implemented a new approach to reaching customers and achieving community alliances. This approach assigned outreach specialists to five market segments. These market segments consisted of: Seniors, Faith-based agencies, Schools, Military populations, and Native American populations. Information regarding CARE outreach events was provided to each of these market segments through a SDG&E outreach specialist so that the representative agencies could inform their clients when and where community events were being held. SDG&E received 1,653 CARE applications from the community.

Mobile Home Parks – In accordance with SB920, in December SDG&E mailed SB920 reminder notices to all managers/owners of submetered facilities. The notices stated that managers/owners must inform their tenants about the CARE program by February 1, 2005 in order to be in compliance with the legislation. Information packets provided to the managers/owners included bulletin board posters and information on how to order additional CARE applications for their tenants. SDG&E received 29 facility responses requesting over 900 CARE/FERA applications.

Customer Brochures – SDG&E customers can receive information about CARE in several different brochures offered to residential customers. In 2004, customers requested the following brochures, which include a description of the CARE program:

<u>Brochure</u>	<u>Requests</u>
New Customer Packet (English)	78,264
New Customer Packet (Spanish)	4,421
Medical Baseline	12,956
Senior Brochure	1,765
Assistance for Residential Customers	9,681

Multi-Family Rebate Program – SDG&E's Multi-Family Rebate program provided cash rebates to property owners and managers. The program applications, which were sent to interested owners/managers, noted that tenants in these properties might qualify for the CARE program.

Energy Education for Low Income Program (EELI) – This program, implemented by SDG&E as part of SDG&E's low-income energy efficiency offerings, educates low-income customers about energy conservation and other utility programs and services, including CARE. Classroom education is provided through a network of local community-based organizations. During PY2004 close to 12,000 customers received energy education. CARE applications are made available to all customers

attending the classes. Information was provided to low-income customers who spoke various languages.

Direct Assistance Program (DAP) – SDG&E’s low-income weatherization program provides recipients of weatherization measures with in-home energy education, including CARE information and an opportunity to enroll in CARE. In 2004, SDG&E added a CARE check box on the weatherization assessment form that allowed the customer to opt into the CARE program. The CARE program was provided with a list of customers who requested CARE enrollment and were determined eligible for participation based on income documentation provided to DAP. CARE enrollments from the DAP program totaled 1,823.

Third Party Outreach Activity --

Outreach and Enrollment ‘capitation contractors’ – During 2004 SDG&E contracted with 18 agencies to provide outreach and enrollment services for the CARE program. These agencies submitted 1,848 applications with 531 customers enrolled on the CARE program. The contracted agencies were paid a fee of \$12 per qualified application (qualified application = customer enrolled on the CARE rate).

Door-to-Door Outreach and Enrollment Campaign – SDG&E contracted with an outside agency to provide door-to door outreach and enrollment services in low-income areas. The agency contacted over 6,700 customers, submitted 1,696 applications, and enrolled 1,261 customers on the program.

B. Discuss each of the following:

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

In 2004, SDG&E found targeted direct mail efforts to be the most effective source of outreach and enrollment of non-participating customer due to the overall response rate and cost.

SDG&E mailed approximately 215,000 targeted direct mail applications in 2004. Over 20,000, or 9% of, customers responded and 15,737 or 7% were enrolled. SDG&E considers these targeted mailings to be an effective method of enrolling the hard-to-reach low-income population. Additionally, the targeted approach helped keep the cost of the mailing to approximately \$5.00 per response and the cost per enrollment at approximately \$6.20. In comparison, the bill insert application mailed to approximately one million non-participating CARE customers received a response of 4,885 customers (less than 1%) at a cost of approximately

\$8.00 per response. Capitation contractors submitted 1,848 applications and enrolled only 531 customers at a cost of \$12.00 per enrollment.

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

Data Exchange – In 2004, SDG&E and SoCalGas exchanged customer information on customers within the shared service territory of Orange County. SDG&E received a list of 501 potential enrollees and enrolled 306 customers. Accounts that were not enrolled included those with names that could not be matched, or accounts that were closed after the match had been made. Customers were mailed a letter notifying them of the enrollment and providing the opportunity to opt-out of the program. Accounts without a name match were mailed a courtesy CARE application.

Joint Utility Meetings - In 2004, SDG&E, along with SoCalGas, Pacific Gas and Electric Company, and Southern California Edison Company, participated in bi-monthly joint utility meetings to discuss outreach efforts and current program issues. The meetings provided a forum for discussing successes and non-successes as well as other program management issues and experiences.

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

CARE information was provided through various programs offered by SDG&E. CARE applications and program information were distributed through the DAP, EELI, Medical Baseline and various energy efficiency programs, such as the Lighting Turn-In and Energy Audits programs. Discussion of additional inter-utility leveraging efforts can be found in Section IV A of this report.

5. Attach a copy of the utility's agreement with CSD. Describe the process for cross-referral of low-income customers between the utility and CSD. Describe how the utility's CARE customer discount information is provided to CSD for inclusion in its federal funds leveraging application.

As part of SDG&E's leveraging agreement with the DCSD (see Attachment C), SDG&E continues to add a statement on its CARE application describing the DCSD LIHEAP bill payment assistance programs and weatherization services and providing DCSD's telephone number for customers to call to obtain more information.

On October 29, 2004, SDG&E provided DCSD with a report that detailed, by month, the number of CARE participants and the total discount provided (see Attachment D).

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

SDG&E has found that as participation increases it becomes increasingly difficult to locate and enroll “hard-to-reach” customers who do not engage or respond to standard means of communication, such as bill inserts, direct mail, outreach events or media advertisements.

In order to mitigate these barriers, SDG&E’s Strategy & Outreach group researched geographic areas of high eligibility and low participation to get a better understanding of the demographics of the areas and determine how to better communicate with these customers. SDG&E worked with community agencies, such as the Kurdish Human Rights Watch, to try to reach customers in their native language. SDG&E also provided door-to-door outreach and enrollment service in both Spanish and English in many of the targeted areas.

SDG&E’s IT enhancement project detailed below was also a means to try to reduce many of the barriers of participation and reduce attrition. SDG&E believes that by pre-printing customer information and mailing documents in both Spanish and English, customers are more likely to return requested applications as well as to respond to recertification requests.

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

In 2004, SDG&E implemented system changes that provided significant process improvements and cost efficiencies for CARE. Improvements included changes to the CARE application, recertification renewal application and request for income verification documents. The application, recertification, and verification documents which had been updated in 2003, were further enhanced to include the customer name, address and account number. All documents are printed in English and Spanish. Additionally, the documents were programmed to print and mail from the same facility from which the SDG&E bills are currently mailed.

Some of the benefits experienced from the changes included:

- Reduction of approximately \$140,000 annually in fulfillment cost and processing efficiencies
- Decrease in customer call volume to CARE processing group by 20%
- Improvement in the customers' response time to requests for recertification
- Decrease of approximately 10% in the number of second notification request for recertification mailed

SDG&E also implemented an IVR update which allowed customers to request CARE applications when calling the Customer Call Center without having to speak to a CSR. The improvement provided customers a quick and easy way to order CARE applications. Over 6,500 customers ordered applications using the IVR system.

V. Processing CARE Applications

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

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

See Tables 7.1 and 7.2.

TABLE 7.1					
CARE Capitation Program					
January 1, 2004 through December 31, 2004					
CARE Applications Submitted					
	Received	Approved	Denied (Ineligible)	Pending/Never Completed	Duplicates
Total	1848	531	50	58	1209
Percentage	100%	28.7%	2.7%	3.1%	65.4%

TABLE 7.2					
CARE Door-to-Door					
January 1, 2004 through December 31, 2004					
CARE Applications Submitted					
	Received	Approved	Denied	Pending/Never Completed	Duplicates
Total	1696	1261	75	22	338
Percentage	100%	74.4%	4.4%	1.3%	19.9%

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

See Table 8.

TABLE 8						
CARE Self-Certification and Self-Recertification Applications						
	Provided	Received	Approved	Denied	Pending/ Never Completed	Duplicates
Total	1,450,436	140,604	128,950	5,577	4,420	5,054
Percentage		9.7%	91.7%	3.9%	3.1%	3.5%

3. Provide a table showing the number of customers removed from CARE by month due to the recertification process. (Note: Customers may be removed due to a variety of reasons including non-response to a request to recertify, failure to complete the application process, ineligibility, or by customer request due to changed eligibility status.)

See Table 9.

TABLE 9			
Residential CARE Program			
Customers Removed by Month through			
Recertification and Post-Enrollment Verification			
2004	Recertification	Post-Enrollment Verification	Total
January	872	684	1556
February	943	727	1670
March	1007	699	1706
April	1694	743	2437
May	1727	675	2402
June	1448	491	1939
July	1588	568	2156
August	918	481	1399
September	580	499	1079
October	896	509	1405
November	972	456	1428
December	893	490	1383
Total	13,606	7,022	20,628

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

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

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

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

1. A letter advising the manager that the recertification process has begun
2. Posters in English and Spanish for the manager to post to notify the tenants
3. Application forms
4. Information form for management to update complex information and order additional posters or applications

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

In 2004, SDG&E continued to improve on enhancements made to the submetered recertification process in 2003. SDG&E further updated tenant applications to preprint the facility ID number for ease in the sorting, locating and processing of applications.

In response to facility managers' requests, additional updates will be made to the 2005 applications removing the request for the account number of the facility from the application. Managers felt burdened by the number of tenants calling to request this information. The use of the facility ID will link the application to the appropriate account number, eliminating the need for the tenant to provide this on the application.

B. Processing Random Post-Enrollment Verification Applications

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

See Table 10.

TABLE 10						
CARE Random Post-Enrollment Verification Applications						
	Mailed	Received	Approved	Denied	Pending/Never Completed	Duplicates
Total	10,199	7,346	4,872	751	1,723	N/A
Percentage	100%	72%	66.3%	10.2%	23.5%	N/A

2. Provide a table showing the number of customers removed from CARE by month due to the verification process. (Note: Customers may be removed due to a variety of reasons including non-response to a request to verify income, failure to complete the verification process, ineligibility, or by customer request due to changed eligibility status.)

See Table 9.

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

SDG&E contracted with third party agencies to provide enrollment services through capitation and through door-to-door enrollment. These agencies served the "hard-to-reach" customers in various languages such as, Spanish, Chinese, Farsi and Arabic.

Although agencies did not enroll a large number of customers as compared to outreach efforts undertaken by the utility, it is difficult to put a value on the effectiveness of their efforts. Customers enrolled through door-to-door activity may not have otherwise responded to direct mail, bill inserts or media advertisements. Or customers who were provided one-on-one enrollment through capitation in their native language may not have likely responded to utility bill inserts. Therefore, a comparison between utility and third-party efforts would not provide an accurate assessment of the value of an enrollment of a truly "hard-to-reach" or "under-served" customer.

VI. Program Management

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

Per Decision 04-02-057, SDG&E implemented the Family Electric Rate Assistance program (FERA) in June 2004. The decision directed utilities to use existing protocols for CARE and to leverage the FERA program whenever CARE outreach was being conducted in order to keep incremental program cost low. SDG&E believed that incorporating FERA program information on the CARE application and creating a new 'dual program' application would be the most efficient and effective method for leveraging the programs.

The Commission requested utilities track customer complaints to ensure the changes to the application did not cause customer confusion and deter customers from applying for either program. SDG&E did not receive any

complaints from this process, nor was any decline in response to CARE outreach observed.

In 2004 SDG&E implemented Automatic Enrollment (AE) of customers participating in LIHEAP through DCSD. In order to implement the process, SDG&E needed to generate programming language to automate the data sharing process as well as to comply with the 30-day opt out process required by the CPUC.

In order to enroll customers from the list as quickly as possible, much of the process was simplified and manual enrollment by the CARE processing groups was utilized. No further enhancements to the system are planned as the number of enrollments from the data sharing does not require a fully automated process (enrollment quantities have dropped--initial enrollment of 897 from the first file of customers received from DCSD to 301 customers from the list received in December). SDG&E will continue with these manual processes until expansion of the AE program programs occurs.

CARE EXPANSION PROGRAM⁴

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

I. Participant Information

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

See Table 11.

TABLE 11						
CARE Expansion Program						
Participating Facilities by Month						
2004	Residential Facilities – Gas	Commercial Facilities – Gas	Total Gas Facilities	Residential Facilities – Electric	Commercial Facilities – Electric	Total Electric Facilities
January	548	118	666	741	207	948
February	556	119	675	749	208	957
March	548	117	665	742	208	950
April	554	118	672	763	211	974
May	564	118	682	778	210	988
June	567	119	686	777	217	994
July	492	106	598	684	188	872
August	443	90	533	588	153	741
September	447	89	536	592	155	747
October	467	89	556	622	153	775
November	471	88	559	617	150	767
December	471	88	559	618	149	767

⁴ For PY2004, SDG&E automated the data capturing of Expanded CARE participant, usage, and discount information, using the company's billing system information and was able to capture data on a monthly basis rather than retrieve all information at the end of the program year.

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

Residential Gas: 8,652	Residential Electric: 5,963
Commercial Gas: 3,163	Commercial Electric: 8,042

II. Usage Information

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

See Table 12.

TABLE 12		
CARE Expansion Program		
Average Monthly Gas/Electric Usage		
Type of Facility	Gas Therms	Electric kWhr
Residential Facilities	161	1,098
Commercial Facilities	378	10,273

III. Program Costs

A. Administrative Cost

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

Processing, Certification and Verification –	\$17,583
General Administration –	\$ 4,642

B. Discount Information

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

Residential Facility Gas Discount –	\$330.82
Residential Facility Electric Discount -	\$362.72

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

Commercial Facility Gas Discount –	\$ 784.71
Commercial Facility Electric Discount -	\$2,789.93

IV. Outreach

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

Utility Outreach – In March 2004, SDG&E began the annual Expanded CARE recertification process for all participating owner agencies. Agencies who did not respond to the first notice were mailed a second notice in April. Approximately 90% of the agencies participating in the program recertified their eligibility. Follow-up calls were made to agencies who did not respond in an effort to continue the agencies participation; however, some of these agencies still did not respond to the utilities efforts.

In October 2004, SDG&E included a bill insert informing commercial and residential customers about the Expanded CARE program. SDG&E also utilized its Outreach Around the Region (OAR) newsletters mailed to local agencies to inform them about the program. The newsletter is mailed to over 230 community agencies in San Diego County and southern Orange County.

Third Party Outreach – Third-parties did not conduct outreach specific to the CARE expansion program on the behalf of SDG&E in 2004.

B. Discuss each of the following:

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

SDG&E's annual recertification process is the most significant method of outreach, as facility information is updated at that time with new facilities being added and those no longer qualified being removed.

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

SDG&E did not share Expanded CARE information with other utilities in PY2004.

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

SDG&E did not encounter any significant barriers to participation in its Expanded CARE program.

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

SDG&E did not implement any changes to the Expanded CARE program in 2004 but continued to utilize existing outreach efforts such as bill inserts, outreach specialists, and the Outreach Around the Region newsletter to keep incremental cost to the program low.

V. Processing CARE Applications

A. Processing Self-Certification and Self-Recertification Applications

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

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

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

See Table 13.

TABLE 13					
CARE Expansion Program					
Self Certification and Self Recertification					
Entity	Received	Approved	Denied	Pending/Never Completed	Duplicates
SDG&E	955	912	7	115	0
Total	955	912	7	115	0
Percentage	100%	95%	1%	12%	0%

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

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

VI. Program Management

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

In 2004, Assembly Bill 868 (AB868) was passed by the California legislature. AB868 changed eligibility requirements for the Expanded CARE program for Migrant Farm Centers to categorically enroll facilities operating through the State Office of Migrant Services. New guidelines would eliminate the previous requirements of 100% eligibility in order for a facility to be enrolled.

The Commission requested the utilities assess the impact of AB868 on their program and to make recommendations as to how to implement the legislation. At year-end 2004, resolution of implementation issues are awaiting a decision by the Commission.

ATTACHMENTS

SDG&E Sixteenth Annual CARE Progress Report
Attachment A – PY2004 SDG&E CARE Media Outreach
May 2, 2005

SDG&E Sixteenth Annual CARE Progress Report
Attachment A – PY2004 SDG&E CARE Media Outreach
May 2, 2005

Media Initiative	Summary	Timeline
Vietnamese Market	<p>SDG&E sponsors a monthly radio show on TNTR, San Diego's only subscriber-based Vietnamese station with over 20,000 listeners. Topics vary but CARE is discussed almost every month since callers have questions about the program.</p> <p>-----</p> <p>A Vietnamese CARE ad ran in Tieng Viet, Nguoi Viet and Saigon Nho for five weeks in August & September.</p>	<p>Radio: Monthly</p> <p>-----</p> <p>CARE enrollments for 2004: 118 For December: 4</p>
Korean Market	Only media activity for the Korean market ran in Feb/March.	<p>CARE enrollments for 2004: 26 For December: 0</p>
Filipino Market	<p>An English print ad is being used for 2004. Focus group research conducted in late 2003 revealed that English is acceptable to use when advertising to the Filipino market. Targeted newspapers are the Filipino Press, San Diego's largest Filipino community newspaper, and the Asian Journal.</p> <p>Additionally, we ran a 60-second radio spot on KYXY/96.5FM, which is the #1 ranked radio station in San Diego among Filipinos. The radio spot aired for four weeks in August/September.</p>	<p>-----</p> <p>CARE enrollments for 2004: 13 For December: 0</p>

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Attachment A – PY2004 SDG&E CARE Media Outreach
May 2, 2005

Media Initiative	Summary	Timeline
Chinese Market	A Chinese CARE ad ran in two publications in August/September 2004 - American Chinese Times and Chinese News.	----- CARE enrollments for 2004: 48 For December: 2
African American Market	Voice & Viewpoint, the largest African-American newspaper in the San Diego region, ran the CARE print ad in August/September 2004. For the August/September campaign, our existing radio spot aired on XHRM, a popular station for African American listeners.	----- CARE enrollments for 2004: 11 For December: 0
Spanish Market	The CARE print ad ran in the following publications this year: <ul style="list-style-type: none"> • El Latino • La Prensa • El Sol • Enlace 	

SDG&E Sixteenth Annual CARE Progress Report
Attachment A – PY2004 SDG&E CARE Media Outreach
May 2, 2005

Media Initiative	Summary	Timeline
	<p>La Nueva and K-Love, the two top Spanish language radio stations in San Diego, ran the existing CARE spot August/September. Ad-libs were also used during the radio flight.</p> <p>The existing CARE 30-second TV spot aired on KBNT and XHAS during August/September.</p>	<p>-----</p> <p>CARE enrollment through 2004: 160 For December: 2</p>
Senior Market	<p>The English print ad ran in Senior Life and San Diego Senior during the month of September</p> <p>In August/September, a 60-second radio spot aired on KPOP/1360AM, the highest-ranking, non-news station among the senior market.</p>	<p>CARE enrollments for 2004: 99 For December: 0</p>
General Market	<p>Targeting specific geographic communities in San Diego that have been ranked as having large low-income populations, SDG&E ran page dominant print ads in local newspapers. Targeted newspapers were:</p> <ul style="list-style-type: none"> • Union/Tribune – South Zone • North County Times – Oceanside Zone • Imperial Beach Eagle & Times • Chula Vista Star News • East County Californian & Alpine Sun • Pennysaver (select zones) <p>The 30-second TV spot aired on seven local TV stations in 2004:</p> <ul style="list-style-type: none"> • KFMB, Channel 8 • KGTV, Channel 10 • KNSD, Channel 7/39 	<p>-----</p> <p>English CARE enrollment through 2004: 759 For December: 3</p>

SDG&E Sixteenth Annual CARE Progress Report
Attachment A – PY2004 SDG&E CARE Media Outreach
May 2, 2005

Media Initiative	Summary	Timeline
	<ul style="list-style-type: none"> • KSWB, Channel 5 • KUSI, Channel 9/51 • XETV, Channel 6 • XUPN, Channel 13 	
Military	The English print ad ran in the Navy Dispatch, The Scout and the Navy Compass in 2004.	<p>-----</p> <p>CARE enrollments for 2004: 22</p> <p>For December: 0</p>

SDG&E Sixteenth Annual CARE Progress Report
Attachment B – SDG&E CARE Outreach and Leveraging Through December 2004
May 2, 2005

SDG&E Sixteenth Annual CARE Progress Report
Attachment B – SDG&E CARE Outreach and Leveraging Through December 2004
May 2, 2005

Activity	Summary	Timeline	Status/Results/Cost
<u>January 2004</u>			
1 st Methodist Church (Escondido) Pairs & Spares Senior Social Group	Customer Assistance Services for Seniors Presentation	01/14/2004	53 Seniors
Vista Project CARE Meeting	Meeting with Senior Service Agency Representatives presenting Customer Assistance Programs and Services	01/21/2004	15 Vista Agency Representatives
Oasis Senior Learning Center (Robinsons-May Co in No County Fair)	Senior Financial Workshop	01/23/2004	30 Seniors
Family Wellness Fair, Cameron YMCA	Customer Assistance Booth provided information on SDG&E Customer Assistance Programs	01/24/2004	300 Residents of Santee and YMCA members
San Marcos Project CARE Meeting	Meeting with Senior Service Agency Representatives presenting Customer Assistance Programs and Services	01/27/2004	30 North County Agency Representatives
North County Task Force on Aging (Vista Library)	Customer Assistance Programs Presentation	01/27/2004	35 Senior Agency Representatives and Volunteers
CARE Outreach Agencies	8 Agencies Submitted Applications (Accepted and put on CARE)	January 2004	71 Low Income Customers CARE applications received

SDG&E Sixteenth Annual CARE Progress Report
Attachment B – SDG&E CARE Outreach and Leveraging Through December 2004
May 2, 2005

Activity	Summary	Timeline	Status/Results/Cost
CARE applications sent/Customer Call Center	CARE applications mailed per customers' request	January 2004	7,520 English 1,491 Spanish 9,011 Total Mailed
<u>February 2004</u>			
El Cajon Branch Office Sign-ups	Sign up customers for the CARE Program	02/02/2004	53 customers signed up or reapplied for CARE
Winegard door-to-door outreach/sign up begins (North County)	Winegard is going door-to-door signing up customers for the CARE Program	02/03/2004	Door-to-door sign ups, continuing throughout the year
Foothill Presbyterian Church Presentation	Customer Assistance Services for Seniors Presentation	02/05/2004	300 Seniors
Imperial Beach Health Center	Customer Assistance Programs and Services Presentation	02/06/2004	30 Caseworkers
National Association of Retired Federal Employees- Chula Vista Chapter	Customer Assistance Programs and Services, Energy Efficiency, and Safety for Seniors Presentation	02/09/2004	40 Seniors
Braille Institute Presentation	Rights and Responsibilities Class including Customer Assistance Services Presentation	02/10/2004	22 Sight-impaired adults, mostly seniors
St Francis Catholic Church Senior Health and Safety Fair	Customer Assistance Booth provided information on SDG&E Customer Assistance Programs	02/11/2004	100 Seniors
Braille Institute Presentation	Rights and Responsibilities Class including Customer Assistance Services Presentation	02/11/2004	19 Sight-impaired adults, mostly seniors
Mission Valley YMCA "Meet the Pharmacist" Health and Safety Event	Showcase Project CARE- Vials of Life	02/13/2004	150 Seniors
Escondido Branch Office Sign-ups	Sign up customers for the CARE Program	02/017/2004	53 customers signed up or reapplied for CARE

SDG&E Sixteenth Annual CARE Progress Report
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May 2, 2005

Activity	Summary	Timeline	Status/Results/Cost
Escondido Branch Office Sign-ups	Sign up customers for the CARE Program	02/018/2004	53 customers signed up or reapplied for CARE
Heartbeat Family Partnership-National City	Customer Assistance Services Presentation (Spanish)	02/23/2004	30 National City Residents
Bethel Evangelical Church (National City)	Customer Assistance Services Presentation CARE and DAP sign-up	02/23/2004	60 Hispanic customers
North County Task Force on Aging (Vista Library)	Customer Assistance Services for Seniors Presentation	02/24/2004	25 Senior Agency Representatives and Volunteers
San Marcos Project CARE Meeting	Customer Assistance Services for Seniors Presentation	02/25/2004	30 Senior Agency Representatives and Volunteers
6 th Annual North County Latino and Migrant Parent Conference	Customer Assistance Programs & Services Presentation	02/28/2004	2,000 San Marcos Residents
7 th Annual Heritage Day Parade (Nu-Way Operation B.H.I.L.D.)	Customer Assistance Programs & Services Presentation	02/28/2004	2,000 San Diego Residents
Meals on Wheels Metro Volunteer Event (Torrey Pines Christian Church)	Customer Assistance Programs & Services Presentation	02/28/2004	120 Meals on Wheels Metro Volunteers
CARE applications sent/Customer Call Center	CARE applications mailed per customers' request	February 2004	7,962 English 1,629 Spanish 9,591 Total Mailed
CARE applications sent/Customer Call Center	CARE applications mailed per customers' request	February 2004	7,962 English 1,629 Spanish 9,591 Total Mailed
<u>March 2004</u>			
Winegard door-to-door outreach/sign up continues (North County)	Winegard is going door-to-door signing up customers for the CARE Program	03/01/2004	Door-to-Door sign ups, continuing throughout the year

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Activity	Summary	Timeline	Status/Results/Cost
Chula Vista Branch Office	Sign up customers for the CARE Program	03/01/2004	33 customers signed up or reapplied for CARE
Chula Vista Branch Office	Sign up customers for the CARE Program	03/02/2004	38 customers signed up or reapplied for CARE
Pt Loma Presbyterian Church Presentation	Customer Assistance Programs & Services Presentation	03/04/2004	30 Caregivers and Respite Care Providers
Navy Lighting Event (Harbor Dr, San Diego)	Lighting Turn-in-Event	03/11/2004	100 Military and Civilian Families
6 th Annual Latino Family Conference (Monterrey Heights Elem School)	Customer Assistance Programs & Services Presentation	03/13/2004	100 Latino Families
San Ysidro Health Center “WIC” Program (National City)	Customer Assistance Programs & Services Booth, Lighting Turn-in-Event and CARE sign-up.	03/20/2004	100 South Bay Families
Community Information Fair (Chula Vista)	Customer Assistance Programs and Commercial Incentives and Rebates for Businesses	03/20/2004	100 South Bay Families
North County Task Force on Aging (Vista Library)	Customer Assistance Services for Seniors Presentation	03/23/2004	35 Senior Agency Representatives and Volunteers
National Organization for Somali Benadiri (San Diego)	Neighbor to Neighbor procedures and Customer Assistance Programs and Services	03/24/2004	5 Office Staff
San Marcos Project CARE Meeting	Customer Assistance Services for Seniors Presentation	03/24/2004	30 Representatives from Senior Agencies in North County
Check Presentation Meals-on-Wheels (San Diego)	\$15,000 Sponsorship-in conjunction with Meals-on-Wheels Association	03/24/2004	40 Meals-on-Wheels Volunteers and Leaders
Senior Health & Safety Fair (San Marcos)	Customer Assistance Programs & Services Booth	03/25/2004	100 San Marcos Seniors
Monte Vista High School Lighting Event “Clean Up Spring Valley”	Lighting Turn-in-Event and CARE sign-up	03/27/2004	100 Spring Valley Residents

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Activity	Summary	Timeline	Status/Results/Cost
“Celebrate Your Health” Fair (Fallbrook)	Customer Assistance Programs & Services Booth and CARE Sign-up	03/27/2004	200 North County Residents
La Feria De La Mujer Presentation (San Diego Concourse)	Seminar presented by KLOV radio station Customer Assistance Programs & Services were presented to attending families	03/27/2004	100 Latino Families
Regional Continuum Care Council (San Diego)	Customer Assistance Programs & Services Presentation	03/30/2004	45 Representatives of Agencies and Non-Profit Organizations
Independent City Simulation (Skyline Church, Rancho San Diego)	Simulated signing up for utility service, provided Customer Assistance information	03/31/2004	100 Foster teens about to leave the welfare system.
CARE applications sent/Customer Call Center	CARE applications mailed per customers’ request	March 2004	8,834 English 1,606 Spanish 16 Vietnamese 10,456 Total Mailed

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Activity	Summary	Timeline	Status/Results/Cost
<u>April 2004</u>			
Winegard door-to-door outreach/sign up continues (North County)	Winegard is going door-to-door signing up customers for the CARE Program	04/01/2004	Door-to-Door sign ups, continuing throughout the year
MAAC Project Head Start (San Marcos)	Customer Assistance Programs & Services Presentation	04/01/2004	45 Family Services Case Workers
Community Resource Fair (Jackie Robinson YMCA)	Customer Assistance Programs & Services & Energy Efficiency Booth	04/03/2004	150 General Community & Low Income Customers
Downtown Branch Office	Sign up customers for the CARE Program	04/05/2004	25 customers signed up or reapplied for CARE
Military Only-32 nd St Naval Base (NEX)	Customer Assistance Programs & Services & Lighting Turn-in-Event	04/15/2004	100 Low-Moderate Income Military Families
Health & Human Services/CalWorks (El Cajon)	Customer Assistance Programs & Services Presentation	04/15/2004	30 CalWorks Mothers
Warner Springs Health Expo (San Jose Valley Sports Park)	Customer Assistance Programs & Services & Lighting Turn-in-Event	04/17/2004	200 Warner Springs Residents
Aging Summit conference-San Diego Concourse	Customer Assistance Programs & Services Booth	04/19/2004	650 Senior Agencies and Senior Customers

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Activity	Summary	Timeline	Status/Results/Cost
Escondido Branch Office	Sign up customers for the CARE Program	04/19/2004	42 Customers sighed up or reapplied for CARE
Willowbrook Countryclub HOA Clubhouse (Lakeside)	Customer Assistance Programs & Services Presentation	04/21/2004	40 Mobilehome Association Residents
San Marcos Middle School “Day of the Child” Festival	Customer Assistance Programs, Services, CARE Sigh-up & Lighting Turn-in-Event	04/24/2004	2,000 San Marcos Residents
Madrid Mobile Park East	Senior Financial Workshop, Lighting Exchange & Customer Assistance Event	04/27/2004	50 Senior Customers
San Diego Center for the Blind (North County) Presentation	Customer Assistance Programs & Services Booth	04/27/2004	20 Sight Impaired Adults
North County Task Force on Again (Vista Library)	Customer Assistance Services for Seniors Presentation	04/27/2004	35 Senior Agency Representatives and Volunteers
San Marcos Project CARE meeting	Customer Assistance Services for Seniors Presentation	04/28/2004	30 Representatives from Senior Agencies in North County
San Diego Center for the Blind (North County) Presentation	Customer Assistance Programs & Services Booth	04/28/2004	20 Sight Impaired Adults
San Diego Center for the Blind (North County) Presentation	Customer Assistance Programs & Services Booth	04/29/2004	20 Sight Impaired Adults
CARE applications sent/Customer Call Center	11 Agencies Submitted Applications (Accepted and put on CARE)	April 2004	250 Low Income Customers CARE applications received

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Activity	Summary	Timeline	Status/Results/Cost
<u>May 2004</u>			
Foothills Adult Center, El Cajon	SDG&E Programs & Services Booth	05/01/2004	500 Residents of El Cajon Grossmont Adult School/Parent Education
Winegard door-to-door outreach/sign up continues (North County)	Winegard is going door-to-door signing up customers for the CARE Program	05/01/2004	Door-to-Door sign ups, continuing throughout the year
MAAC Project Head Start (San Marcos)	SDG&E Meeting with head Start discussing SDG&E Programs and Services	05/04/2004	30 members of San Marcos MAAC Project head Start
East End Club of Escondido	Presentation of Energy Conservation and Programs & Services of SDG&E	05/05/2004	20 Senior Women of the East End Club
2004 Multi-Cultural Heritage Day – Marine Corps Air Station Miramar	Promoting SDG&E Programs & Services as well as Operation Home Sweet Home	05/06/2004	1,000 Military Families
Interfaith Coastal Services (Oceanside)	Presentation of SDG&E Programs & Services	05/07/2004	20 Social Service Case Managers
Grossmont Mall Walkers Presentation	Presentation of Energy conservation and Programs & Services of SDG&E	05/08/2004	50 Grossmont Mall Walkers
Grant Middle School (Escondido)	Lighting turn-in-event and Customer Assistance eService Booths	05/08/2004	616 City of Escondido Residents

SDG&E Sixteenth Annual CARE Progress Report
Attachment B – SDG&E CARE Outreach and Leveraging Through December 2004
May 2, 2005

Activity	Summary	Timeline	Status/Results/Cost
Wells Park, El Cajon – Step out for Seniors	SDG&E Programs & Services Booth	05/10/2004	150 El Cajon Seniors
Mid-City CAN Community Council Faith Lutheran Church (Orange Ave)	Presentation of SDG&E Programs & Services	05/11/2004	30 Members of the Mid-City CAN Community Council
Health Education & Insurance Fair, Chula Vista (South Region Health & Human Services)	SDG&E Programs & Services Booth	05/11/2004	200 South Bay Residents
Mid-City CAN Community Council (University Ave)	Presented SDG&E Programs and Services to the director of the Mid-City Collaborative	05/13/2004	Member of the Mid-City Collaborative Council
County of San Diego Commission on Children, Youth and Families (Balboa Ave)	Presentation of SDG&E Programs & Services	05/13/2004	30 State of California Welfare Council Members
Health and Resources Fair, Vista Senior Center	SDG&E Programs & Services Booth	05/14/2004	100 Vista Seniors
San Marcos Senior Center-California Senior Center Week	SDG&E Programs & Services Booth	05/14/2004	100 San Marcos Seniors
San Ysidro High School	Lighting turn-in-event and Customer Assistance Service Booth	05/15/2004	309 South Bay Residents

SDG&E Sixteenth Annual CARE Progress Report
Attachment B – SDG&E CARE Outreach and Leveraging Through December 2004
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Activity	Summary	Timeline	Status/Results/Cost
30 th Annual Rental Housing Education Conference & Expo (San Diego Convention Center)	SDG&E Programs & Services & Multi-Family Program Booth	05/18/2004	2,000 + Convention Attendees
Housing Education Conference & Expo (San Diego Convention Center)	Family Program Booth		
Sharp Cabrillo Hospital Lighting Event	Lighting Turn-in-Event and SDG&E Programs & Services Booths	05/18/2004	106 Customers
Vista Project CARE Meeting	SDG&E Programs & Services for Seniors Presentation	05/20/2004	15 Representatives from Senior Agencies in North County
2004 health Fair – Marine Corps Air Station Miramar	Promoting SDG&E Programs & Services as well as operation Home Sweet Home	05/20/2004	1,000 Military Families
North County Jewish Seniors (Oceanside Senior Citizens Center)	Presentation of Energy Conservation & SDG&E Programs & Services	05/20/2004	25 North County Jewish Seniors
Independent City Simulation (the Center, San Diego)	Simulated signing up for utility service, provided SDG&E Programs & Services information	05/22/2004	100 Foster teens about to leave the welfare system
Civic Center Park, Lemon Grove	Lighting Turn-in-Event and SDG&E Programs & Services Booths	05/22/2004	421 Lemon Grove Residents
CalWorks Office, Chula Vista	SDG&E Programs & Services Presentation	05/24/2004	12 CalWorks Members

SDG&E Sixteenth Annual CARE Progress Report
Attachment B – SDG&E CARE Outreach and Leveraging Through December 2004
May 2, 2005

Activity	Summary	Timeline	Status/Results/Cost
Diversity Schoolhouse, Health Services Complex (Rosecrans St, San Diego)	SDG&E Programs & Services Presentation	05/25/2004	30 health & Human Services Members
North County Task Force on Aging (Vista Library)	Presentation on SDG&E Programs & Services to Seniors	05/25/2004	35 Senior Agency Representatives and Volunteers
San Marcos Project CARE Meeting	Presentation on SDG&E Programs & Services to Seniors	05/26/2004	30 Representatives from Senior Agencies in North County
“Winning in Tough Financial Times” Senior Workshop, St John of the Cross Church (Lemon Grove)	WITFT Seminar with SDG&E Programs & Services Presentation	05/27/2004	50 Seniors and Caregivers
CARE applications sent/Customer Call Center	CARE applications mailed per customers request	May 2004	5,920 English 1,261 Spanish 11 Vietnamese 7,192 Total Mailed

SDG&E Sixteenth Annual CARE Progress Report
Attachment B – SDG&E CARE Outreach and Leveraging Through December 2004
May 2, 2005

Activity	Summary	Timeline	Status/Results/Cost
<u>June 2004</u>			
Winegard door-to-door outreach/sign up continues (North County)	Winegard is going door-to-door signing up customers for the CARE Program	06/01/2004	Door-to-Door sign ups, continuing throughout the year
El Cajon Branch Office	Sign up customers for the CARE Program and distribute information on other Customer Assistance Programs	06/01/2004	23 Customers signed up or reapplied for CARE
Sea World	Presentation on SDG&E Programs & Services to seniors. AARP sponsored “Terrific Tuesdays”	06/01/2004	60 Seniors
San Diego Hospice Camino Del Rio South	Presentation on SDG&E Programs and Services (including disabled services)	06/03/2004	30 Hospice Staff
Meals-on-Wheels North County Volunteers	Presentation on SDG&E Programs and Services	06/03/2004	50 North County Volunteers
City of San Marcos, Civic Center	Lighting Turn-in-Event and SDG&E Programs & Services Booths	06/05/2004	450 Residents of San Marcos
City Heights Comm Development Corp Street Fair	SDG&E Programs & Services Booth	06/05/2004	1,000 San Diego Residents
Mid-City Collaborative Meeting (Faith Lutheran Church)	Presentation on SDG&E Programs and Services	06/08/2004	30 Council Members

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Activity	Summary	Timeline	Status/Results/Cost
Mid-City Collaborative meeting (Wellness Center, San Diego)	Mid-City Community Advocacy Network Meeting	06/08/2004	Over 150 agencies, schools, residents and religious institutions serving San Diego neighborhoods represented.
Imperial Beach Women's Club	Presentation on SDG&E Programs and Services	06/08/2004	40 Imperial Beach Seniors
Neighborhood House Assn North Inland Head Start (Escondido)	Presentation on SDG&E Programs and Services	06/09/2004	2 Directors of Programs
RSVP Volunteers Brunch (Town & County Hotel)	SDG&E sponsored brunch to thank Seniors who volunteer in the community. Promotion of SDG&E Programs and Services.	06/09/2004	630 Senior Volunteers
Energy Conservation Day (Hilltop Elementary School, Chula Vista)	SDG&E Programs and Services Booth	06/10/2004	160 Parents of Hilltop Third Grade Class
La Mesa Senior Health Fair	SDG&E Programs and Services Booth	06/11/2004	150 East County Seniors
CHW Regional Development Center (Chula Vista Mall)	SDG&E is a Board Member of the Advisory Committee for CHW. Bi-Monthly meetings.	06/11/2004	8 Members of the committee
Imperial Beach Chili & Jazz Festival	Lighting Turn-in-Event and SDG&E Programs & Services Booths	06/12/2004	250 Imperial Beach Residents

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Activity	Summary	Timeline	Status/Results/Cost
Vista Project CARE Meeting	SDG&E Programs & Services for seniors Presentation	06/17/2004	15 Representatives from Senior Agencies in North County
2 nd Annual Fiesta Filipinina Street Fair (Gaslamp)	Lighting Turn-in-Event and SDG&E Programs & Services Booths	06/19/2004	8,000 Local San Diego Residents
Bayside Community Center	Presentation on SDG&E Programs and Services	06/21/2004	Rose Caballo, Executive Director of BCC
North County Task Force on Aging (Vista Library)	Presentation on SDG&E Programs & Services to Seniors	06/22/2004	35 Senior Agency Representatives and Volunteers
San Marcos Project CARE Meeting	Presentation on SDG&E Programs & Services to Seniors	06/23/2004	30 Representatives from Senior Agencies in North County
Apartment Assn of Escondido	Presentation on SDG&E Programs & Services to Seniors	06/23/2004	30 Escondido Apartment Assn Residents
Tower after Hours Celebrating Mexico (Museum of Man)	Presentation on SDG&E Programs & Services to Seniors	06/24/2004	300 San Diego Residents
Kearny High School, Linda Vista	Lighting Turn-in-Even and SDG&E Programs & Services Booths	06/26/2004	200 Residents of Linda Vista
CARE Outreach Agencies	15 Agencies Submitted Applications (Accepted and put on CARE)	June 2004	362 low Income Customers CARE applications received
CARE/FERA applications sent/Customer Call Center	CARE/FERA applications mailed per Customers request	June 2004	6,132 English 1,335 Spanish 14 Vietnamese 7,481 Total Mailed

SDG&E Sixteenth Annual CARE Progress Report
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Activity	Summary	Timeline	Status/Results/Cost
<u>July 2004</u>	As SDG&E is outreaching both CARE and LIEE together, along with its other customer assistance programs, effective with July, only Table B is being completed to show the company's outreach efforts.		
<u>Tesoro Grove</u> PRESENTATION	Customer Assistance presented information on all programs and services	07/07/2004	50 Tenants educated and given applications and brochures
<u>Symposium on the Aging Crisis in San Diego</u> EVENT	Customer Assistance and Community Relations provided an information booth at this event. Topics discussed included a program of All-inclusive care for the elderly through the PACE program. The PACE program enables low-income, frail seniors to continue to live in their own homes and communities.	07/09/2004	100-150 Seniors over 65 years of age
<u>San Ysidro Festival</u> LIGHTING TURN-IN EVENT	A lighting turn-in and Customer Assistance event for residents of San Ysidro	07/10/2004	250 Residents of San Ysidro

SDG&E Sixteenth Annual CARE Progress Report
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Activity	Summary	Timeline	Status/Results/Cost
<u>Mid-City Collaborative</u> MEETING	Customer Assistance participated in this advocacy network of over 150 community agencies	07/13/2004	150 Agencies
<u>San Diego Works (CalWorks)</u> PRESENTATION	A presentation was given to CalWorks participants that covered Customer Assistance programs and services along with an overview of jobs/employment at the utilities	07/13/2004	30 Participants
<u>Vista Project Care</u> MEETING	A meeting to discuss Customer Assistance Programs and Services was given to Senior Service Agency representatives	07/15/2004	15 Service Agencies
<u>Crisis House</u> TRAINING	Neighbor to Neighbor/Customer Assistance training to agency that provides shelter for battered women	07/20/2004	Trained agency manager/social worker
<u>Interfaith Community Services</u> MEETING	Customer Assistance attended a brown bag luncheon and Congregational meeting to hear a presentation about upcoming trends and demographics in north County	07/21/2004	
<u>Meals on Wheels</u> MEETING	Meeting to discuss an outreach effort when MOW and SDG&E programs and services will have information distributed at local hospitals	07/22/2004	

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Activity	Summary	Timeline	Status/Results/Cost
<u>Summer Concert Series, Santee</u> LIGHTING TURN-IN EVENT	Lighting turn-in and Customer Assistance Programs and Services event	07/22/2004	150 Santee Residents
<u>Imperial Counties labor Union</u> EVENT	Customer Assistance participated in the labor union's annual event to promote programs and services	07/24/2004	1,000 San Diego and Imperial Counties union labor employees
<u>North County Task Force on Aging</u> PRESENTATION	A presentation was given to agency representatives and volunteers on SDG&E Customer Assistance programs	07/27/2004	35 Representatives and Volunteers
<u>San Marcos Project CARE</u> PRESENTATION	A presentation was given to agency representatives on SDG&E Customer Assistance Programs	07/28/2004	20-30 Representatives from Senior Service Agencies in North County
<u>Museum of Man</u> EVENT	Information on SDG&E programs and services was distributed at this event	07/29/2004	300 San Diego Residents
<u>City Heights Urban Village</u> LIGHTING TURN-IN EVENT	Lighting Turn-in event that also covered Customer Assistance programs	07/31/2004	600 City Heights and Normal Heights Residents
<u>Winegard door-to-door outreach/sign up continues</u>	Door-to-door sign ups for the CARE program	July 2004	Door-to-Door sign ups, continuing throughout the year
<u>CARE/FERA applications sent/Customer Call Center</u>	CARE/FERA applications mailed per customers request	July 2004	2,593 English 688 Spanish 12 Vietnamese 3,653 Total Mailed
<u>CARE Capitation</u>	11 Agencies submitted applications	July 2004	31 Applications received

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Activity	Summary	Timeline	Status/Results/Cost
<u>Contractors</u>			
<u>General Agency Outreach</u>	Updated CARE applications and Customer Assistance information left at agencies within SDG&E territory	Being done on an ongoing basis, starting July 2004	CARE applications and Customer Assistance applications left, continuing throughout the year

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Activity	Summary	Timeline	Status/Results/Cost
<u>August 2004</u>			
<u>National Night Out</u> EVENT	Information booth providing materials on all Customer Assistance programs and services	08/03/2004	800 + Residents of San Diego
<u>Chula Vista Elementary School</u> PRESENTATION	Presented information on Customer Assistance programs	08/05/2004	Assistance Superintendent of Chula Vista school district
<u>Phillippine Cultural Arts Festival</u> EVENT	Information booth providing materials on all Customer Assistance programs and services	08/07/2004 & 08/08/2004	1,000 Residents of San Diego
<u>San Clemente Fiesta Festival</u> EVENT	Information booth providing materials on all Customer Assistance programs and services	08/08/2004	45,000 Residents of San Clemente
<u>San Diego Works (CalWorks)</u> PRESENTATION	Presented information on Customer Assistance programs	08/10/2004	30 CalWorks Participants
<u>Lemon Festival</u> EVENT	Information booth providing materials on all Customer Assistance programs and services	08/15/2004	45,000 Residents of Chula Vista

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Activity	Summary	Timeline	Status/Results/Cost
<u>SDG&E Clairemont Branch Office</u> CARE SIGN UP DAY	Sign up customers for the CARE Program and distribute information on other Customer Assistance Programs	08/16/2004	33 Customers put on CARE rate
<u>CSW Navy Exchange</u> LIGHTING TURN-IN EVENT	Lighting Turn-in event that also covered Customer Assistance programs	08/18/04	100 Military and residents of San Diego
<u>North County Food Bank</u> PRESENTATION	Presented information on Customer Assistance Programs	08/20/2004	10 North County Food Bank Lead Employees
<u>Encanto Street Fair</u> LIGHTING TURN-IN EVENT	Lighting Turn-in event that also covered Customer Assistance programs	08/21/2004	350 Residents of Encanto
<u>Community Resource Center</u> PRESENTATION	Presented information on Customer Assistance programs	08/23/2004	10 Managers of City of San Diego Community Resource Centers
<u>Southern California Indian Council Annual Pow-Wow</u> EVENT	Leveraged with Southern California Gas Company with a booth providing information and materials on all Customer Assistance programs and services for both utilities	08/27 – 08/29/2004	35,000 in attendance from Southern California
<u>Chula Vista Community Fest</u> EVENT	Information booth providing materials on all Customer Assistance programs and services	08/28/2004	450 Rancho Vista Covenant Church members and Chula Vista Residents

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Activity	Summary	Timeline	Status/Results/Cost
<u>Cornerstone Church Summerfest</u> EVENT	Information booth providing materials on all Customer Assistance programs and services	08/28/2004	450 Cornerstone Church members and City of National City Residents
<u>City of El Cajon</u> LIGHTING TURN-IN EVENT	Lighting turn-in event that also covered customer Assistance programs	08/28/2004	600 Residents of El Cajon
<u>San Marcos Street Fair</u> EVENT	Information booth providing materials on all Customer Assistance programs and services	08/29/2004	45,000 Residents of San Marcos
<u>NAS North Island</u> LIGHTING TURN-IN EVENT	Lighting Turn-in event that also covered Customer Assistance programs	08/31/2004	100 Military Only personnel
<u>Winegard door-to-door outreach/sign up continues</u>	Door-to-door sign ups for the CARE program	August 2004	Door-to-Door sign ups, continuing throughout the year
<u>CARE/FERA applications sent/Customer Call Center</u>	CARE/FERA applications mailed per customers request	August 2004	4,081 English 840 Spanish 12 Vietnamese 4,933 Total Mailed
<u>CARE Capitation Contractors</u>	6 Agencies submitted applications	August 2004	37 applications received

SDG&E Sixteenth Annual CARE Progress Report
Attachment B – SDG&E CARE Outreach and Leveraging Through December 2004
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Activity	Summary	Timeline	Status/Results/Cost
<u>September 2004</u>			
<u>SDG&E Chula Vista Branch Office</u> CARE SIGN UP DAY	Sign up customers for the CARE Program and distribute information on other Customer Assistance Programs	09/07/2004	2 Applications received
<u>SDG&E Escondido Branch Office</u> CARE SIGN UP DAY	Sign up customers for the CARE Program and distribute information on other Customer Assistance Programs	09/07/2004	8 applications were received and put on the CARE rate
<u>Celebrate Chula Vista</u> EVENT	Information booth providing materials on all Customer Assistance programs and services	09/11/2004	5,000 Residents of Chula Vista
<u>Grape Day Festival</u> EVENT	Information booth providing materials on all Customer Assistance programs and services	09/11/2004	400 Residents of Escondido
<u>Fiesta del Barrio, Carlsbad</u> EVENT	Information booth providing materials on all Customer Assistance programs and services	09/12/2004	7,000 Residents of Carlsbad
<u>Fiestas Patrias</u> EVENT	Information booth providing materials on all Customer Assistance programs and services	09/14/2004	20,000 SDG&E territory residents attended this event
<u>Safari Mobile Lodge</u> PRESENTATION	Presented information on Customer Assistance programs	09/15/2004	35 Senior residents of the mobile home community

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Activity	Summary	Timeline	Status/Results/Cost
<u>Fiesta Nacional De La Independencia de Mexico</u> EVENT	Information booth providing materials on all Customer Assistance programs and services	09/15/2004	400 San Diego Residents
<u>BF Goodrich Health Fair</u> EVENT	Information booth providing materials on all Customer Assistance programs and services	09/15/2004	400 Residents of Chula Vista
<u>Hands on San Diego</u> EVENT	Information booth providing materials on all Customer Assistance programs and services	09/18/2004	1,200 Volunteers for meals on Wheels
<u>Pacific Islander Festival</u> EVENT	Information booth providing materials on all Customer Assistance programs and services	09/25/2004	100,000 San Diego Residents attended this event
<u>Bonitafest</u> EVENT	Information booth providing materials on all Customer Assistance programs and services	09/25/2004	40,000 Residents of Bonita
<u>Oktoberfest, Encinitas</u> EVENT	Information booth providing materials on all Customer Assistance programs and services	09/26/2004	40,000 Residents of Encinitas
<u>Child Abuse Prevention Committee</u> PRESENTATION	Presented information on Customer Assistance programs	09/27/2004	20 Committee members
<u>Winegard door-to-door outreach/sign up continues</u>	Door-to-door sign ups for the CARE program	September 2004	Door-to-Door sign ups, continuing throughout the year

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Activity	Summary	Timeline	Status/Results/Cost
<u>CARE/FERA applications sent/Customer Call Center</u>	CARE/FERA applications mailed per customers request	September 2004	3,379 English 764 Spanish 12 Vietnamese 4,155 Total Mailed
<u>CARE Capitation Contractors</u>	6 Agencies submitted applications	September 2004	45 Applications received
<u>San Diego Agencies</u>	40 Agencies were visited	September 2004	Provided CARE/FERA applications and POP stands

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Activity	Summary	Timeline	Status/Results/Cost
<u>October 2004</u>			
<u>Assistance League of Greater San Diego</u> EVENT	CARE applications enclosed in agency Children's clothing drive	10/05/2004	35 + Children
<u>Older Americans Health & Information Fair</u> EVENT	Information booth providing materials on all Customer Assistance programs and services	10/15/2004	200 Seniors attended this event
<u>13th Annual Affordable Housing</u> EVENT	Information booth providing materials on all Customer Assistance programs and services	10/15/2004	50 Customers received information on all programs
<u>Dia de la Mujer Latina</u> EVENT	Information booth providing materials on all Customer Assistance programs and services	10/16/2004	300 Customers attended the event
<u>Lowes Grand Opening</u> EVENT	Information booth providing materials on all Customer Assistance programs and services	10/16/2004	500 Customers of Santee attended this event
<u>Mud Run</u> EVENT	Information booth providing materials on all Customer Assistance programs and services	10/16/2004	5,000 military personnel participated in this event

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Activity	Summary	Timeline	Status/Results/Cost
<u>Family Health Fair</u> EVENT	Information booth providing materials on all Customer Assistance programs and services	10/16/2004	3,000 Customers of San Marcos attended this event
<u>Apostolic Assembly</u> EVENT	Information booth providing materials on all Customer Assistance programs and services	10/17/2004	500 Customers from National City attended this event
<u>ICMA Conference</u> EVENT	Information booth providing materials on all Customer Assistance programs and services	10/19/2004	1,000 San Diego city and county managers attended this event
<u>Kaiser Hospital</u> EVENT	Information booth providing materials on all Customer Assistance programs and services	10/19/2004	1,000 Customers of La Mesa Attended this event
<u>Johnson & Johnson Employee Fair</u> EVENT	Information booth providing materials on all Customer Assistance programs and services	10/22/2004	60 Employees of Johnson & Johnson attended this event
<u>Fall Home Show</u> EVENT	Information booth providing materials on all Customer Assistance programs and services	10/22 – 10/24/2004	1,000 Customers visited this booth to receive information and materials

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Activity	Summary	Timeline	Status/Results/Cost
<u>ElderCare Luncheon</u> EVENT	Information booth providing materials on all Customer Assistance programs and services	10/23/2004	200 Customers and volunteers of ElderCare attended this luncheon
<u>Volunteer Improvement & Beautification</u> EVENT	Information booth providing materials on all Customer Assistance programs and services	10/23/2004	500 Customers attended the event
<u>Marriott Health & Safety Fair</u> EVENT	Information booth providing materials on all Customer Assistance programs and services	10/28/2004	1,300 Employees attended this event in San Marcos
<u>Tower After Hours</u> EVENT	Information booth providing materials on all Customer Assistance programs and services	10/28/2004	500 Customers attended this event
<u>Mountain Community Health Fair</u> EVENT	Information booth providing materials on all Customer Assistance programs and services	10/30/2004	200 Customers attended the event in Descanso
<u>Dia de los Muertos</u> EVENT	Information booth providing materials on all Customer Assistance programs and services	10/31/2004	400 Customers attended this event in Oceanside

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Activity	Summary	Timeline	Status/Results/Cost
<u>CARE/FERA applications sent/Customer Call Center</u>	CARE/FERA applications mailed per customers request	October 2004	2,673 English 680 Spanish 11 Vietnamese 3,364 Total Mailed
<u>CARE Capitation Contractors</u>	11 Agencies submitted applications	October 2004	287 Applications received

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Activity	Summary	Timeline	Status/Results/Cost
<u>November 2004</u>			
<u>North Island Navy Base Fun Run EVENT</u>	Information booth providing materials on all Customer Assistance programs and services	11/03/2004	200 Military Customers
<u>Grandparents Raising Grandchildren SEMINAR</u>	Information booth providing materials on all Customer Assistance programs and services	11/05/2004	100 Customers attended this event in La Mesa
<u>Assistance League of Greater San Diego</u>	CARE Sign up	11/02/2004	50 Customers attended this event
<u>Enviro Fair EVENT</u>	Information booth providing materials on all Customer Assistance programs and services	11/05/2004	5,000 Customers attended this event
<u>Males as Positive Forces EVENT</u>	Information booth providing materials on all Customer Assistance programs and services	11/06/2004	600 Customers attended this event
<u>Race for the Cure EVENT</u>	Information booth providing materials on all Customer Assistance programs and services	11/07/2004	15,000 racers
<u>University City Community Service Center EVENT</u>	Information booth providing materials on all Customer Assistance programs and services	11/09/2004	10 CARE sign ups San Diego

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Activity	Summary	Timeline	Status/Results/Cost
<u>3rd Annual Intergenerational Games</u> EVENT	Information booth providing materials on all Customer Assistance programs and services	11/10/2004	250 Seniors and 4 th grade students in Chula Vista
<u>3rd Annual Intergenerational Games</u> EVENT	Information booth providing materials on all Customer Assistance programs and services	11/17/2004	250 Seniors and 4 th grade students in Chula Vista
<u>Marriott Health & Safety Fair</u> EVENT	Information booth providing materials on all Customer Assistance programs and services	11/11/2004	100 Employees of the Marriott
<u>Chula Vista Branch Office</u> EVENT	CARE Sign up	11/12/2004	50 CARE sign ups
<u>National City Branch Office</u> EVENT	CARE Sign up	11/16/2004	50 CARE sign ups
<u>California State Assn of Counties</u> EVENT	Information booth providing materials on all Customer Assistance programs and services	11/16 – 11/19/2004	500 Customers attended this event at the San Diego Convention Center
<u>Oasis Time</u> PRESENTATION	Presentation given to 40 Seniors	11/14/2004	40 Seniors
<u>CARE Capitation Contractors</u>	7 Agencies submitted applications	November 2004	276 Applications received
<u>CARE/FERA applications sent/Customer Call Center</u>	CARE/FERA applications mailed per customers request	November 2004	4,304 English 1,128 Spanish 12 Vietnamese 5,444 Total Mailed

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May 2, 2005

Activity	Summary	Timeline	Status/Results/Cost
<u>December 2004</u>			
<u>California-Mexico Health Fair</u> EVENT	Information booth providing materials on all Customer Assistance programs and services	12/04/2004	1,000 Residents of Ramona
<u>Postal Annex</u>	CARE Sign up	12/06/2004	10 CARE sign ups in San Ysidro
<u>SDG&E Branch Office</u>	CARE Sign up	12/07/2004	10 CARE sign ups in San Ysidro
<u>Market Creek Holiday Gift Fair</u>	Information booth providing materials on all Customer Assistance programs and services	12/11/2004	500 Residents of San Diego
<u>CARE Capitation Contractors</u>	11 Agencies submitted applications	December 2004	429 Applications received
<u>CARE/FERA applications sent/Customer Call Center</u>	CARE/FERA applications mailed per customers request	December 2004	4,667 English 1,265 Spanish 4 Vietnamese 5,936 Total Mailed

SDG&E Sixteenth Annual CARE Progress Report
Attachment C – SDG&E Letter Agreement with DCSD
May 2, 2005



May 23, 2003

This Letter of Agreement is entered into by the Department of Community Services and Development (CSD) and San Diego Gas & Electric (SDG&E) for the purpose of ensuring integration and coordination of resources and benefits between CSD's Home Energy Assistance Program (HEAP), and SDG&E's California Alternate Rates for Energy (CARE) Program. The existence of the Agreement places CSD within compliance of the Department of Health and Human Services' LIHEAP Leveraging Incentive Program requirements and enables California to claim the CARE discount as a leveraged resource. Both programs provide a form of energy assistance to low-income customers. It is mutually agreed that both parties will assist in the referral of their customers to the other energy assistance program through written and/or verbal advertising of the program.

The eligibility criteria for both programs is based solely on income eligibility and the guidelines are specific to each program. HEAP income guidelines are set at 60% of the State Median Income; CARE guidelines are set at 150% of the Federal Income Poverty Guidelines, adjusted annually by a formula based on changes in the Consumer Price Index. Assistance for either program is limited to eligible low-income households.

The levels of assistance for each program vary according to the respective program. The amount of Federal funding; the number of persons in the household; the applicant's geographical location; and the household's income determine HEAP assistance levels. The CARE program offers a 15% reduction off the applicant's monthly gas/electric costs or charges.

Both programs are operated year round. HEAP provides one-time assistance, per household, per program year (January through December). Applicants must reapply annually. CARE provides a continuous rate reduction throughout the year with the applicant re-certifying biennially.

Both programs are integrated/coordinated through the written/verbal referral of applicants/customers to the opposite program. Both programs provide the name and telephone number of the other program with their respective applications and have included cross-references to the other program in their marketing materials.

A report on the number of households assisted and the total amount of assistance will be provided to the HEAP Program annually.

SDG&E shall make available to the CSD or its representative all appropriate nonprivileged documents, papers and records pertinent to the referral process and leveraged amounts for examination, copying or mechanical reproduction for a period of three years from the date the information is submitted to CSD. Specifically, SDG&E will provide CSD with data necessary for completion of California's annual Leveraging Application. The data will be requested each October and will cover the preceding October through September timeframe. The information requested includes: 1) the total number of households currently receiving the reduced rates; and 2) the total discount received by all participating households.

AGREED TO:

[signed: Tim Dayonot]

Director
Department of Community
Services and Development

[dated: 6/16/00]

Date

[signed: Yvette M. Vazquez]

Manager, Residential Energy Programs
San Diego Gas & Electric

[dated: 5/24/00]

Date

[Executed document on file at SDG&E]

SDG&E Sixteenth Annual CARE Progress Report
Attachment D – SDG&E Leveraging Data for DCSD
May 2, 2005

SDG&E Sixteenth Annual CARE Progress Report
Attachment D – SDG&E Leveraging Data for DCSD
May 2, 2005

-----Original Message-----

From: Yamagata, Joy C.

Sent: Friday, October 29, 2004 8:46 AM

To: 'Leveraging@csd.ca.gov'

Subject: SDG&E and SoCalGas Response to Department of Community Services and Development Request for Leveraging Data

Lisa, attached please find the requested information regarding SDG&E and SoCalGas' CARE and customer assistance efforts. If you have any questions or require additional data, please contact me.



SDGE 2004 DCSD
Leveraging report.do