



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

JANUARY 2007 – DECEMBER 2007

May 1, 2008

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**CARE PROGRESS REPORT
 RESIDENTIAL AND EXPANDED PROGRAMS**

January 1, 2007 through December 31, 2007

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		
PY2007	Total CARE Participants	Percentage Change
January	150,333	-
February	150,757	0.3%
March	151,989	0.8%
April	152,449	0.3%
May	152,634	0.1%
June	152,434	-0.1%
July	153,726	0.8%
August	153,689	0.0%
September	152,901	-0.5%
October	154,012	0.7%
November	153,710	-0.2%
December	156,814	2.0%

Table 1.2 Residential CARE Program Electric Customers by Month		
PY2007	Total CARE Participants	Percentage Change
January	220,105	-
February	220,375	0.1%
March	222,137	0.8%
April	222,756	0.3%
May	223,085	0.1%
June	222,820	-0.1%
July	224,664	0.8%
August	224,470	-0.1%
September	223,052	-0.6%
October	225,057	0.9%
November	224,834	-0.1%
December	229,759	2.2%

The year-end participation for (PY) 2006 for gas was 149,149 and electric was 218,494. Net increases over program year (PY) 2006 participation at year-end for gas and electric CARE programs were 7,665 gas customers, or 5%, and 11,265 electric customers, or 5%.

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 PY2007.

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.

SDG&E, and the other California IOU's, used the joint utility methodology adopted by the Commission in D.01-03-028 for developing quarterly and monthly penetration estimates in 2007. This method entails annual estimation of eligibility for CARE, LIEE, and other income-by-household size parameters at the small area (block group, census tract, zip+2, etc.) for each IOU territory and for the state as a whole.

Sources for this estimation include the Commission's current guidelines, current year small area vendor marginal distributions on household characteristics, Census PUMS 2000 and PUMS 2004-2006 sample data, utility meter and master meter household counts, Department of Finance Consumer Price Index (CPI) series, and various geographic information systems (GIS) sources.

Estimates from the block group level are aggregated to county/utility and whole utility level, among other aggregations. Each quarter, the utility applies county/utility level eligibility fractions to a new set of "technical eligibility counts" (for CARE these are metered and sub-metered occupied housing units) obtaining an estimate of income/demographic in household count form.

Every month, including each quarter, the utility counts the number of households (by small area, by county, and overall) that are enrolled in CARE. The CARE household total, including individually metered sub-metered occupied housing units, is divided by the total income/demographic eligibility.

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

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

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

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

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

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

4. Describe how current CARE customers were counted.

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

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

The formula for calculating CARE-participation rates is:

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

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

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

See Tables 2.1 and 2.2.

TABLE 2.1			
CARE Residential Penetration Rate			
Gas			
2007 Quarter Ending	CARE Residential Customers	CARE-Eligible Customers	CARE Penetration Rate
31-Mar	151,989	227,613	66.8%
30-Jun	152,434	227,782	66.9%
30-Sep	152,901	227,000	67.4%
31-Dec	156,814	227,187	69.0%

TABLE 2.2			
CARE Residential Penetration Rate			
Electric			
2007 Quarter Ending	CARE Residential Customers	CARE-Eligible Customers	CARE Penetration Rate
31-Mar	222,137	335,699	66.2%
30-Jun	222,820	336,619	66.2%
30-Sep	223,052	336,070	66.4%
31-Dec	229,759	336,410	68.3%

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

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

- System Wide Gas Rate – 28.02%
- System Wide Electric Rate – 27.84%

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

At year-end SDG&E had 32,345 gas submetered customers in 806 master-meter facilities. Assuming, 28.02% of its residential gas customers are eligible for CARE, SDG&E estimates that 9,063 of its gas submetered customers are CARE-eligible.

SDG&E had 37,679 electric submetered customers; assuming 27.84% of its residential electric customers are eligible for CARE. SDG&E estimates that 10,490 of its electric submetered customer are CARE-eligible.

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

Gas -	8,948
Electric -	9,834

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

Gas -	99%
Electric -	94%

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

SDG&E continues to work towards simplifying and enhancing processes for submetered tenants. In 2007, SDG&E developed a “Tenant’s Rights Fact Sheet” that is delivered to submetered tenants when they enroll in the program or recertify their eligibility.

SDG&E did experience a delay in the commencement of the annual submetered recertification in 2007. Postponement of the implementation of the new CARE reporting database was responsible for the delay, which initially caused confusion for some of the tenants. The recertification was initiated in September rather than July 2007.

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 3*			
Average Monthly Gas/Electric Usage Residential Non-CARE vs. CARE Customers			
Residential Customer	Gas Therms Baseline	Gas Therms Non-Baseline	Total
Non-CARE	22	8	30
CARE	21	6	26
Residential Type	Electric kWh Baseline	Electric kWh Non- Baseline	Total
Non-CARE	298	234	532
CARE	279	104	383

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 4*		
Average Monthly Gas/Electric Bill Residential Non-CARE vs. CARE Dollars per Customer		
Customer	Gas	Electric
Non-CARE	\$ 39.14	\$ 90.43
CARE	\$ 24.12	\$ 42.70

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

III. Program Cost¹

A. Discount Cost

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

Average Gas Discount - \$6.05
 Average Electric Discount - \$11.00

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

Annual Gas Subsidy – \$ 11,373,610
 Annual Electric Subsidy - \$ 29,499,460

B. Administrative Costs

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

See Table 5.

TABLE 5			
CARE Residential Program			
CARE Costs and Reporting Classifications			
Category	Cost		
	Residential	Expansion	Total
Outreach	\$1,249,023	\$0	\$1,249,023
Processing, Certification and Verification	\$280,723	\$6,356	\$287,079
Information Technology/Programming	\$324,531	\$0	\$324,531
Measurement and Evaluation	\$16,136	\$0	\$16,136
Regulatory Compliance	\$192,809	\$0	\$192,809
General Administration	\$321,565	\$0	\$321,565
CPUC Energy Division Staff Funding	\$34,587	\$0	\$34,587
Total Program Costs	\$2,419,374	\$6,356	\$2,425,730
Subsidies and Benefits – Rate Discounts, SEC discounts	\$40,427,909	\$445,161	\$40,873,070
TOTAL PROGRAM COSTS AND CUSTOMER DISCOUNTS	\$42,847,283	\$451,517	\$43,298,800

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

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

¹ Information on average discount amount is derived from an analysis of SDG&E’s billing data.

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

bill inserts, brochures and flyers, advertising, targeted direct mail and telephone campaigns, community event sponsorships and support, distribution of collateral materials, outreach staff labor, and other outreach and enrollment efforts. Capitation payments and any agency-related outreach support efforts are also included in this category. Capitation payments are compensation fees paid to third-parties and community-based organizations that assist SDG&E in enrolling hard-to-reach CARE-eligible customers in the program.

Processing, Certification and Verification: Costs include the CARE Administration Group labor and data entry costs. The function of the CARE Administration Group includes: 1) opening and sorting CARE application forms; 2) processing all CARE applications; 3) initiating and responding to customers' inquiries regarding CARE applications/program; and 4) tracking CARE enrollment and operating statistics in support of operations, management, and regulatory reporting.

Information Technology(IT)/Programming: Included in this category are IT staff costs to maintain the CARE billing system, CARE documents, CARE database, system reports, data exchange with other utilities, undertaking system enhancements to comply with CPUC mandates, and improving operation efficiency.

Measurement and Evaluation: Costs for measurement and evaluation includes contract and staff labor expenses for the Needs Assessment Study, and CARE participant eligibility updates.

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

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

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

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

Gas –	\$ 299,533	Under-collection
Electric -	\$1,858,933	Under-collection

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

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

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

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

See Tables 6.1 and 6.2.

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	\$38	\$1	2.2%	6,423,676	52%
CORE Commercial / Industrial	\$428	\$13	3.1%	4,690,894	38%
CORE Natural Gas Vehicles	\$23,075	\$779	3.4%	269,684	2%
NONCORE Commercial/Industrial	\$9,352	\$1,402	15%	<u>955,029</u>	8%
Total				\$12,339,283	100%

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

(2) Includes PPP Surcharge Funds.

(3) Funds billed per the tax surcharge PPP rate (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	\$88	\$0.79	0.9%	9,473,140	33%
Master Metered	\$299	\$4.66	1.6%	266,685	1%
Commercial	\$628	\$6.97	1.1%	11,883,416	42%
Industrial	\$43,725	\$780.09	1.8%	6,524,642	23%
Agricultural	\$871	\$10.15	1.2%	474,135	2%
Total				\$28,622,018	100%

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

(2) Funds billed per the PPP rate component.

IV. Outreach

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

Utility Outreach Activity -- For complete details on SDG&E's media and community outreach efforts, please see Attachments A and B, entitled "PY2007 SDG&E CARE Media Outreach" and "SDG&E CARE Outreach and Leveraging Through December 2007."

Telephone Enrollment - In late 2007, SDG&E began a telephone enrollment initiative, which provided customers with an automated telephone call through a third party vendor. Customers were targeted by utilizing census data along with PRIZM code information. This unique

initiative allowed customers to interact with the automated message by answering the questions on the CARE application form, and following the prompts from the automated message. In PY 2007, SDG&E telephoned over 35,000 customers resulting in 5,465 enrolling in the CARE program. SDG&E will continue to use this form of outreach while seeking improvements to its telephone script and targeting in an attempt to grow this approach to customer enrollment.

Telephone Recertification - Customers being considered to be dropped from the program due to non-response to recertification requests were given an additional opportunity to remain enrolled by outbound telephone call from a third party contractor. During PY 2007, over 1500 customers were telephoned and asked to recertify their eligibility. SDG&E was able to recertify 62% of those customers whom otherwise would have been dropped from the CARE program due to non-response.

2007 Annual Notification – SDG&E’s annual bill insert notification occurred from mid-July to mid-August. The notification is in English and Spanish, and is supported by radio, print, and television media campaigns. Over 1 million customers were sent the bill insert and about 1,500 applications were received from this effort.³ SDG&E believes this mandated approach is resulting in fewer and fewer enrollments each year.

Bill Inserts – In addition to the annual notification in July, SDG&E included a CARE application in all non-CARE customer bills during the month of February. In PY 2006, SDG&E piloted an English only version of this bill insert and received approximately double the response rate as the dual language bill insert. Due to its success, SDG&E did a similar bill insert in PY 2007. In PY 2007, SDG&E received over 3,000 CARE applications as a result to the English only bill insert.

Bill Message – Messages in and outside the billing envelope are other ways of promoting the CARE program, at no additional cost. In August, a bill message describing the CARE program was included in all non-CARE customer bills. In addition to the bill message, an article about the CARE program was included in SDG&E’s monthly bill publication *Energy Notes*. In January of 2007, the outer envelope of all customer bills included a general message on all SDG&E customer assistance programs, which include the CARE program.

Interactive Voice Response (IVR) Information on Hold – The telephone messages heard by customers waiting for help from SDG&E’s call center provides information about the CARE program in both English and Spanish. The system provides the customers with the option to order CARE applications directly from the IVR without having to speak to a

³ D.89-07-062, OP 3 ordered the utilities to notify ratepayers of the program by a bill notice (insert).

customer service representative (CSR). Approximately 2,429 customers requested CARE applications using the IVR.

Customer Contact Employees – SDG&E continues to offer CARE through its customer service representatives (CSRs). Customers calling the call center are advised of the CARE program while on hold through SDG&E's IVR system. All CSR's are trained and educated to answer questions regarding the CARE program, and to assist customers in completing the application. In 2007, the CARE application became available through an online submittal process. In addition to the application being available for downloading, customers may fill out the application online and submit directly to SDG&E's CARE group. CSR's were instrumental in communicating the availability of this resource to customers, and assisting them with the submission process. Over 4,000 applications were submitted through the online process and CSRs requested over 14,000 applications be mailed to potential CARE-eligible customers.

SDGE Leveraging - The CARE program creates opportunities in which to leverage with other sources within the company. Outreach Specialists visited SDG&E Branch Offices throughout the year to sign-up customers who make payments at payment locations and encouraged employees to continue to offer CARE to customers at all times. In 2007, SDG&E received 14,572 customer applications resulting in 7,631 enrollments through branch office outreach efforts. SDG&E field collectors promote the CARE program while delivering notices to customers facing disconnection. Along with those disconnect notices, customers are provided a CARE application. Approximately 150 applications were received from customers through the field collectors in 2007. SDG&E also provides an additional outbound telephone call with a follow-up letter to low-income customers faced with collection activity on their account. Information about the availability of payment arrangements and customer assistance programs 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) CSRs to ensure that most customers have access to information about utility services. In addition to Spanish-speaking CSRs, the telephone center is also staffed with CSRs who speak Vietnamese, Chinese and Korean. The CARE processing group is also bilingual in English and Spanish. Additionally, SDG&E contracts with AT&T's language services organization to provide in-language support to customers whose language is not spoken by SDG&E CSRs. The service offers interpreter service for different languages and dialects that includes, but is not limited to, French, German, Italian, Japanese, Russian and Tagalog. SDG&E representatives

remain on the telephone line with the customer and connect the customer to the interpreter for translation.

Media – SDG&E supported select 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 received over 2,600 customer applications from the print advertisements. Enrollment information for television and radio campaigns was not tracked.

Direct Mail – SDG&E continues to use direct mail in an effort to enroll all customers who qualify for the CARE program. Census data information is used to target potentially eligible customers in low-income areas. Over 250,000 direct mail pieces were mailed in 2007. Response rates continue to hover in the 4-5% range, well above the industry standard of 2-3%. Over 13,000 customers were enrolled through direct mail efforts.

Community Outreach Events – Throughout 2007, SDG&E participated in over 58 local community outreach events throughout San Diego County to provide information on CARE and other customer assistance programs. Types of outreach events included presentations to community groups, governmental agencies, health and safety fairs, community resource fairs, with several events geared toward faith based organizations. Many of the outreach events were leveraged with the Residential Lighting Turn-In Program which was targeted to hard-to-reach residential customers. At these outreach events information on CARE and other programs was available to customers and included CARE applications.

Mobile Home Parks – In accordance with California Civil Code Section 798.43.1(a),⁴ SDG&E mailed reminder notices to all managers/owners of submetered facilities stating that they must inform their tenants about the CARE program each year by February 1. CARE applications and bulletin board posters in English and Spanish were sent to facilities when requested.

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

SDG&E remained in compliance with AB 2104, which improves the communication between submetered tenants and the utility. Beyond the requirements of AB 2104, SDG&E also developed the “Tenant’s Rights Fact Sheet” which was distributed upon enrolling or recertifying eligibility. The sheet, which is bilingual, describes customers’ rights, outlines who to contact if they have concerns, and makes available the Submetered

⁴ Otherwise referred to as Senate Bill (SB) 920 (2001), which requires the management of master-meter mobilehome parks to give residents written notice each year about assistance available to low-income persons under CARE.

Information Hotline, a toll-free number to call if they have questions about program status.

Customer Brochures – SDG&E customers can receive information about CARE in several different brochures offered to residential customers. In 2007, customers requested the following brochures, which include a description of the CARE program:

<u>Brochure</u>	<u>Requests</u>
New Customer Packet (English)	55,445
New Customer Packet (Spanish)	4,817
Medical Baseline	15,389
Senior Brochure	100
Assistance for Residential Customers	484

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

Low-Income Energy Efficiency Program (LIEE) – SDG&E’s LIEE program provides recipients of LIEE services with in-home energy education, including CARE information and an opportunity to enroll in CARE. A check box is located on the weatherization assessment form that allows the customer to opt in to the CARE program. The CARE program was provided with a list of 11,268 customers who requested CARE enrollment and were determined eligible for participation based on income documentation provided as part of qualifying for the LIEE program. CARE enrollments from the LIEE program totaled 2,578 for 2007.

2. Third Party Outreach Activity --

Third Party Outreach Activity – Outreach and Enrollment ‘Capitation Contractors’ – In PY 2007, SDG&E reports 47 agencies at 91 different sites provided outreach and enrollment services for the CARE program. These agencies submitted 5,507 applications with 2,619 customers enrolled on the CARE program. The contracted agencies were paid a fee ranging from \$5.00 to \$15.00 per qualified application, depending on their length of service and contract terms.

2-1-1 Info Line – During PY2007, 2-1-1 answered 17,628 energy assistance calls. The CARE and Family Electric Rate Assistance (FERA) programs were discussed during these telephone calls along with other assistance program and an application was sent to those who requested one. In September of 2007, 2-1-1 began to submit applications through the newly established URL on SDGE's website. To date, almost 200 enrollments have been received through this effort.

B. Discuss each of the following:

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

SDG&E believes the most effective outreach methods of the year were the implementation of Telephone and Internet enrollment, both were implemented in 2007. SDG&E was able to enroll 5,465 customers from telephone campaigns running in November and December. Targeting potentially-eligible customers was an extremely cost effective method for enrolling customers at \$2.36 per enrollment.

Internet enrollment was implemented in April 2007. By year-end 2007, a total of 4,006 applications were received and of those 2,946 were enrolled. The Call Center was directly involved in guiding customers to the Internet. Although it is not possible to quantify just how many Internet applications were generated through an initial CSR contact, there has been a steady increase in number of applications submitted this way throughout the year. Prior to April, customers were able to view and download applications from SDG&E's website; 875 downloaded applications were submitted and of those, 676 were enrolled. There were no additional costs to the program to support either Internet applications or enrollments.

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

Data Exchange – SDG&E and Southern California Gas Company (SoCalGas) exchange CARE customer data in the shared service territory of Southern Orange County throughout the program year. SDG&E received 476 potential enrollees from this list and enrolled 246 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 their enrollment and provided the opportunity to opt out of the program. Accounts without a name match were mailed a courtesy CARE application.

Joint Utility Meetings – In 2007, SDG&E, along with SoCalGas, Pacific Gas and Electric Company, Southern California Edison Company, and Southwest Gas Corporation, participated in bi-monthly joint utility meetings to discuss outreach

efforts and current program issues. The meetings provided a forum for discussing success and non-success stories, as well as other program management issues and experiences.

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

CARE information was provided to customers through various programs offered by SDG&E. CARE applications and program information were distributed through the LIEE outreach personnel, Medical Baseline communication and various energy efficiency programs, such as the Lighting Turn-In and Energy Audits programs. The LIEE program also utilizes existing CARE enrollment data in targeting its outreach efforts, including door-to-door canvassing and direct mail, in an effort to reach eligible customers and minimize enrollment costs.

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

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

On October 31, 2007, SDG&E provided DCSD with a report that detailed, on a monthly basis, the number of CARE participants and the total discount provided (see Attachment C1).

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

In SDG&E's service territory 28% of households qualified for the CARE program. Approximately 68.3% of the eligible households are currently enrolled in CARE. Outreach efforts to overcome language, cultural, and geographical barriers to enrollment have included the following:

- Increasing the number of Community Based Organizations participating as CARE capitation agencies 400% (from 16 to 67);
- Increasing the number of Lighting Turn-In events (25) held in "hard-to-reach" zip codes;
- Expanding our reach into low income customer base through a partnership with H&R Block;

- Supporting the California Earned Income Tax Credit (EITC) initiative by partnering with EITC agencies to offer CARE enrollment as a part of the tax preparation process;
- Increasing the number of CARE enrollments through Women, Infants, and Children's (WIC) program by contracting with six WIC sites; and
- Improving the number of CARE enrollments through the Salvation Army organizations, resulting in over 300 enrollments during the winter season.

In addition to these efforts, special initiatives such as the Faith-based outreach effort during the holiday season, CARE enrollment opportunities were offered in conjunction with Cool Zones and senior citizen centers, and partnering with our internal groups (customer service field, collection and credit, customer call center, and branch offices).

In 2007, the Energy Programs Outreach team restructured their approach to managing enrollments through community based organizations. The new approach reflects productivity toward achieving enrollment goals for agencies contracted as CARE capitation contractors. The new proactive approach, with advisors serving as account executives, resulted in a 700% increase in CARE enrollments in the last six months of the year (compared with the first half of 2007).

Focusing on highly productive third-party contractors within the community, the team increased the number of agents 50%, including a large agency (North County Health Services) that serves hard-to-reach groups through community clinics serving diverse populations and rural areas. Increased enrollments and DAP referrals began to grow with the capture of regional WIC locations through the San Ysidro Health Center and Salvation Army centers throughout our service territory as 2007 came to a close.

SDG&E continues to partner with cultural organizations that serve ethnic minorities. Their staff members help SDG&E to communicate program guidelines and eligibility requirements to their community members. In addition, a supply of CARE applications is left with organization for use after the events.

In 2007, a Customer Assistance Outreach Group staff member continued to provide a monthly presentation to a cultural orientation class for new immigrants from Vietnam, Laos, Afghanistan, Somalia, Iraq, Russia, Ethiopia and other countries at Catholic Charities.

The results of our increased outreach efforts, focused on income-eligible and hard-to-reach households, was a 247% increase in CARE enrollments through CARE capitation agents in the SDG&E service territory.

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 mid-2007, SDG&E implemented Internet Enrollment process that allowed customers to submit CARE applications electronically. The on-line application was made available on SDG&E's website, allowing for an efficient and simple method for submitting customer information for processing. Customers are asked to enter household and income information as well as their enrollment status in another assistance program (if applicable). Once the application is submitted, it is sent electronically to be processed. There were no incremental program costs for implementation of the online application, making this a cost effective solution for CARE enrollments.

SDG&E also implemented telephone enrollment, targeting potentially-eligible segments. Customers were called via outbound IVR and were prompted to enter their household and income information (and public assistance program enrollment if applicable) and were also asked to agree to the statement declaring that the information entered was true. The process involved a series of call passes, should the customer not respond to the initial contact. The cost for the telephone campaigns was extremely low, costing less than \$2.50 per enrollment.

In 2007, SDG&E continued to utilize its recertification Probability Model to automatically recertify customers who pass certain parameters relating to electric consumption, years in the residence, home ownership, and other demographic indicators. The objective of the model is to minimize the number of customers, in highly eligible areas, who are dropped from the program because they fail to complete the recertification process. Approximately 48,000 customers were recertified through the model in 2007.

In late 2007, SDG&E launched Phase I of the Customer Assistance Reporting & Enrollment (CARE) System. The system is designed to track and report activity as it relates to program processing. While the level of efficiency and the ease of reporting are already being experienced, the complete benefits have not yet been fully realized as the database continues to be developed and customized to meet the program's needs. SDG&E intends to continue to update and improve the system in order to continue to improve program efficiencies and simplify and expedite the enrollment process for customers.

V. Processing CARE Applications

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

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

See Table 7.

TABLE 7					
CARE Capitation Program					
January 1, 2007 through December 31, 2007					
CARE Applications Submitted					
	Received	Approved	Denied (Ineligible)	Pending/Never Completed	Duplicates
Total	5,492	4,355	612	129	396
Percentage	100%	79.30%	11.14%	2.35%	7.21%

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						
	Provided¹	Received	Approved²	Denied	Pending/Never Completed³	Duplicates
Total	1,266,602	114,323	99,078	5,051	4,783	5,411
Percentage	100%	9.03%	86.66%	4.42%	4.18%	4.73%

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

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

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

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

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

TABLE 9			
Residential CARE Program			
Customers Removed by Month through			
Recertification and Post-Enrollment Verification			
2007	Recertification	Post-Enrollment Verification	Total
January	840	435	1,275
February	192	284	476
March	223	190	413
April	224	367	591
May	495	234	729
June	277	210	487
July	228	354	582
August	378	369	747
September	215	229	444
October	423	247	670
November	418	280	698
December	553	316	869
Total	4,466	3,515	7,981

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

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

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

Tenant’s Rights Fact Sheet sent when recertification request mailed.

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 made available for the manager to post to notify the tenants;
3. Application forms made available; and
4. An information form for management to update complex information and order additional posters or applications.

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

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	4,589	4,689	3,810	420	459	N/A
Percentage	100%	102.18%	60.74%	6.70%	7.32%	N/A

*Received and Approved includes applications from Third-Party Contractors, Capitation Agencies, Unsolicited Income Verifications, and Pending applications from 2006: Third-Party Contractors (3,892), Capitation Agencies (272), Unsolicited Verifications (235), Pending applications from 2005 (230).

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

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

See Table 9 above.

C. Describe any contracts the utility has with third parties to conduct certification, recertification and/or verification on the utility’s behalf. Describe how these third-party efforts compare to the utility’s efforts in comparable

customer segments, such as hard-to-reach or under-served. Include comparisons of effectiveness and cost-effectiveness of comparable customer segments, if available.

SDG&E contracted with 36 third-party agencies at 50 locations in 2007 to provide enrollment services. These agencies served the hard-to-reach customers in various languages such as Spanish, Chinese, Farsi, Russian, Somali and Arabic; they were paid a capitation fee for each eligible customer enrolled in the CARE program.

Although the agencies did not enroll a large number of customers as compared to other outreach efforts undertaken by the utility, it is difficult to quantify the effectiveness of their efforts. Customers who were provided one-on-one enrollment in their native language may not have been as likely to respond to utility bill inserts, for example. Further, agencies, unlike the utility, do not have the ability to determine the current program status of their clients and cannot specifically target those who are not yet enrolled. 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.

Categorical Eligibility - The most significant change affecting program management in 2007 was the implementation of Categorical Eligibility. Categorical Eligibility qualifies customers for CARE based on their current participation in one or more approved public assistance programs (WIC, Healthy Families, Medicare, Food Stamps, and TANF). This was a significant change as it required a revision of all CARE application forms and other customer contact materials.

Internet Enrollment - Allowing customers to apply to CARE online (available in English, Spanish, and large font) was another change affecting program management in 2007. Having an application available to be completed and submitted online provides another way for customers to gain access to CARE and has enhanced the application process, by making it easier and more simplified.

The New CARE System - The new CARE system was implemented in late September 2007. The system functions as a reporting and processing tool. It allows increased capabilities in terms of tracking and reporting enrollment activity. A significant amount of time was dedicated towards the creation and testing of the new database. The CARE system allows for a more streamlined approach to processing applications, greater analytical flexibility, and a historical perspective that was difficult to obtain previously.

CARE EXPANSION PROGRAM

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

I. Participant Information

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

See Table 11.

TABLE 11						
CARE Expansion Program						
Participating Facilities by Month						
2007	Residential Gas Facilities	Commercial Gas Facilities	Total Gas Facilities	Residential Electric Facilities	Commercial Electric Facilities	Total Electric Facilities
January	488	104	592	687	198	885
February	489	104	593	687	198	885
March	495	104	599	693	198	891
April	413	89	502	568	175	743
May	502	97	599	667	175	842
June	513	104	617	736	194	930
July	453	95	548	676	175	851
August	450	94	544	657	176	833
September	449	88	537	655	170	825
October	452	88	540	657	173	830
November	451	88	539	652	172	824
December	451	88	539	653	172	825

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

Residential Gas: 8,966 **Residential Electric:** 7,843
Commercial Gas: 3,502 **Commercial Electric:** 7,753

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	184	1,083
Commercial Facilities	385	8,876

III. Program Costs

A. Administrative Cost

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

Processing, Certification and Verification – \$6,356

B. Discount Information

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

Residential Facility Gas Discount – \$436

Residential Facility Electric Discount - \$403

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

Commercial Facility Gas Discount – \$ 913

Commercial Facility Electric Discount - \$2,455

IV. Outreach

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

SDG&E Outreach –

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

B. Discuss each of the following:

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

SDG&E's annual recertification process continues to be the most significant method of outreach, as facility information is updated at that time, with new facilities being added and those no longer qualified being removed. SDG&E also utilized no-cost outreach efforts such as outreach specialists and the *Outreach Around the Region* newsletter to increase awareness of the CARE Expansion Program.

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

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

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

There were no barriers to participation encountered during PY2007.

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

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

V. Processing CARE Applications

A. Processing Self-Certification and Self-Recertification Applications

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

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

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

See Table 13.

TABLE 13					
CARE Expansion Program					
Self Certification and Self Recertification					
Entity	Received	Approved	Denied	Pending/Never Completed	Duplicates
SDG&E	925	904	5	16	0
Total	925	904	5	16	0
Percentage	100%	97.73%	0.54%	1.73%	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.

SDG&E reports that there were no issues and/or events that significantly affected program management during PY2007.

Attachment A – SDG&E CARE 2007 Media Table

Attachment A – PY2007 SDGE CARE Media Outreach

Media Initiative	Summary	Timeline
Vietnamese Market	<p>PRINT: For the months of June, July, August and September, an in-language Vietnamese CARE print ad ran in:</p> <ul style="list-style-type: none"> ▪ <i>Nguoi Viet San Diego</i> ▪ <i>Saigon Nho San Diego</i> <p>RADIO: Program sponsorship messages were heard on TNTR, a subscriber-based Vietnamese radio station based in San Diego for 10 weeks.</p> <p>OUTREACH: New in 2007, in-language grass roots outreach was conducted at Lucky Seafood Market during four weekends in June, July and August.</p>	<p>Print and Radio: 10-week flight from 6/18 through 7/22 and 8/6 through 9/10.</p> <p>Outreach: 4 weekends in June, July and August: 6/30-7/1; 7/7-7/8; 8/11-8/12 and 8/18-8/19</p> <p>-----</p> <p>109 applications received</p>
Chinese Market	<p>PRINT: For the months of June, July, August and September, an in-language Chinese CARE print ad ran in:</p> <ul style="list-style-type: none"> ▪ <i>American Chinese Times</i> ▪ <i>Next Weekly</i> ▪ <i>Chinese News</i> (monthly) <p>OUTREACH: New in 2007, in-language grass roots outreach was conducted at 99 Ranch Market during four weekends in June, July and August.</p>	<p>Print and Radio: 10-week flight from 6/18 through 7/22 and 8/6 through 9/10.</p> <p>Outreach: 4 weekends in June, July and August: 6/30-7/1; 7/7-7/8; 8/11-8/12 and 8/18-8/19</p> <p>-----</p> <p>5 applications received</p>

SDG&E Nineteenth Annual CARE Progress Report
 Attachment A – PY2007 SDGE CARE Media Outreach
 May 1, 2008

Media Initiative	Summary	Timeline
Filipino Market	<p>PRINT: For the months of June, July, August and September, an English CARE print ad(with a Filipino focus) ran in:</p> <ul style="list-style-type: none"> ▪ Asian Journal San Diego ▪ Filipino Press <p>OUTREACH: New in 2007, in-language grass roots outreach was conducted at Seafood City during four weekends in June, July and August.</p>	<p>Print and Radio: 10-week flight from 6/18 through 7/22 and 8/6 through 9/10.</p> <p>Outreach: 4 weekends in June, July and August: 6/30-7/1; 7/7-7/8; 8/11-8/12 and 8/18-8/19</p> <p>-----</p> <p>Grass Roots Outreach Total: 425 applications received</p>
African American Market	<p>PRINT: <i>Voice & Viewpoint</i>, the largest African-American newspaper in the San Diego region, ran the CARE ad twice during 2007.</p>	<p>Print: 5/11 and 8/23 insertion dates.</p> <p>-----</p> <p>1 application received</p>

SDG&E Nineteenth Annual CARE Progress Report
 Attachment A – PY2007 SDGE CARE Media Outreach
 May 1, 2008

Media Initiative	Summary	Timeline
Spanish Market	<p>PRINT: A CARE print ad in Spanish ran in <i>El Latino</i> twice, the <i>Pennysaver</i> four times and in a Union Tribune direct mail “<i>Local News</i>” once during 2007.</p> <p>RADIO: DJs at Spanish language radio stations KLQV-FM, XHTY-FM and XLTN-FM, the top Spanish language radio stations in San Diego, discussed the CARE program in paid promotional spots during three flights in 2007.</p> <p>TV: Univision produced and ran a :30 spot featuring one of their spokesperson/anchors promoting the CARE program during a concentrated 4-week flight in June and July</p>	<p>PRINT: <i>El Latino</i> insertion 3/16 and 8/31 <i>PennySaver</i> insertions 2/21, 4/18, 9/12 and 11/14 <i>UT Insert</i>: 8/23</p> <p>RADIO: 2/25 - 3/17, 5/6 - 5/26, 7/29 - 9/7 and 9/15 - 10/27</p> <p>TV: 4-week flight from 6/25 - 7/22</p> <p>----- 473 applications received</p>
Senior Market	<p>PRINT: English print ads ran in the following publications throughout the year:</p> <ul style="list-style-type: none"> ▪ <i>So. Calif Senior Life</i> (March) ▪ <i>2008 SD Eldercare Directory</i> (October) ▪ <i>2008 SD After Hospital Planner</i> (October) 	<p>Print: August issue</p> <p>----- 5 applications received</p>

SDG&E Nineteenth Annual CARE Progress Report
 Attachment A – PY2007 SDGE CARE Media Outreach
 May 1, 2008

Media Initiative	Summary	Timeline
<p>General Market (English)</p>	<p>PRINT: Page dominant print ads in ran twice during the year in the <i>North County Times</i> – Oceanside Zone. In addition, rural communities were targeted via the <i>Pennysaver</i> (in English and Spanish) four times during the year and in a Union Tribune direct mail “<i>Local News</i>” once during 2007.</p> <p>RADIO: DJs at KSON and XHRM in San Diego, discussed the CARE program in paid promotional spots during three flights in 2007.</p> <p>TV: KUSI produced and ran a :30 spot featuring Rod Luck (one of their anchors) promoting the CARE program during a concentrated 4-week flight in June and July</p>	<p>PRINT: <i>NC Times</i> insertions on 5/14 and 10/8. <i>PennySaver</i> insertions 2/21, 4/18, 9/12 and 11/14 <i>UT Insert</i>: 8/23</p> <p>RADIO: 2/25 - 3/17, 5/6 - 5/26, 7/29 - 9/7 and 9/15 - 10/27</p> <p>TV: 4-week flight from 6/25 - 7/22</p> <p>----- 2,758 applications received</p>

SDG&E Nineteenth Annual CARE Progress Report

Attachment B – SDG&E CARE Outreach and Leveraging Through December 31, 2007

Attachment B – SDG&E CARE Outreach and Leveraging Through December 31, 2007

SDG&E Nineteenth Annual CARE Progress Report

Attachment B – SDG&E CARE Outreach and Leveraging Through December 31, 2007

Activity	Summary	Timeline	Status/Results/Cost
JANUARY 2007			
San Clemente High School LIGHTING EXCHANGE EVENT	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information. Audit's offered same day.	01/20/07	187 Customers from San Clemente
Our Lady of Mt. Carmel Catholic Church EVENT	CARE sign up table and Information on all customer assistance and energy-efficiency program and services provided at faith based organization.		100 Customer's from San Ysidro
YMCA Health and Wellness Fair EVENT	CARE sign up table and Information on all customer assistance and energy-efficiency program and services provided at faith based organization.		90 Customer's from Santee
FEBRUARY 2007			
Congregation Beth Israel EVENT	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information. Audit's offered same day.	02/04/07	100 Customers from San Diego
Florence Elementary School – EVENT	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information. Audit's offered same day.	02/10/07	190 Customers from San Diego
Presentation – Center for the Blind	Customer Assistance Program/ Energy Efficiency/ Rebate Presentation and CARE	02/22/2007	30 Customers from Vista

SDG&E Nineteenth Annual CARE Progress Report

Attachment B – SDG&E CARE Outreach and Leveraging Through December 31, 2007

Activity	Summary	Timeline	Status/Results/Cost
	sign up		
EVENT Mexican Consulate Health Fair	CARE sign up table and Information on all customer assistance and energy-efficiency program and services provided at faith based organization.	02/24/07	60 Customers from San Marcos
EVENT Imperial Beach Pier Plaza	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information. Audit's offered same day.	02/24/07	150 Customers from Imperial Beach
MARCH 2007			
EVENT Southwestern College - Higher Education Center	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	03/3/07	50 National City Customers
EVENT Santee Mast Park	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	3/3/07	196 Santee Customers
Presentation - Mountain Empire Union School District	Customer Assistance Program/ Energy Efficiency/ Rebate Presentation and CARE sign up	03/05/07	15 Pine Valley Customers
Presentation – Center for The Blind	Customer Assistance Program/ Energy Efficiency/ Rebate Presentation and CARE sign up	03/06/2007	20 Vista Customers

SDG&E Nineteenth Annual CARE Progress Report

Attachment B – SDG&E CARE Outreach and Leveraging Through December 31, 2007

Activity	Summary	Timeline	Status/Results/Cost
Presentation - Access to Independence	Customer Assistance Program/ Energy Efficiency/ Rebate Presentation and CARE sign up	3/06/07	20 San Diego Customers
Escondido Senior Center EVENT	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	03/06/07	50 Customers attended presentation.
Community Resource Fair EVENT	Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information.	03/07/07	100 San Diego Customers participated
North Park Recreation Center EVENT	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	3/17/06	325 San Diego Customers
Alpha Kappa Alpha Community Fair EVENT	Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	03/23/07	100 El Cajon Customers
Episcopal Community Services EVENT	Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	03/24/07	40 Customers attended booth
Independent Skills Living	Customer Assistance Program/ Energy	03/27/07	100 Customers attended

SDG&E Nineteenth Annual CARE Progress Report

Attachment B – SDG&E CARE Outreach and Leveraging Through December 31, 2007

Activity	Summary	Timeline	Status/Results/Cost
Program	Customer Assistance Table , Efficiency/ Rebate Presentation and CARE sign up		
Presentation - Turning The Hearts Center	Customer Assistance Information (CARE, DAP, Medical Baseline, etc.)	03/24/07	27 Customers participated
Presentation - Domestic Workers of America	Customer Assistance Information (CARE, DAP, Medical Baseline, etc.)	03/24/07	
Jackie Robinson YMCA EVENT	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	03/31/07	232 San Diego Customers
APRIL 2007			
Presentation - SD Youth & Community Services	Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information.	04/05/07	160 Customers from Oceanside. 75 CARE applications distributed.
Presentation - Villa Novia Country Estates	Information on all customer assistance and energy-efficiency program and services provided. CARE sign up's	04/10/07	Poor attendance due to rain.
George L Stevens Senior Center EVENT	Information on all customer assistance and energy-efficiency program and services provided	04/11/07	150 Customers from San Diego.
San Juan Capistrano City Hall EVENT	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate	04/14/2007	184 San Juan Capistrano Customers

SDG&E Nineteenth Annual CARE Progress Report

Attachment B – SDG&E CARE Outreach and Leveraging Through December 31, 2007

Activity	Summary	Timeline	Status/Results/Cost
EVENT	Information		
Mission San Luis Rey EVENT	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	04/15/07	15 Oceanside Customers
Earth Day San Juan Capistrano EVENT	Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information.	04/19/07	800 San Juan Capistrano Customers
Presentation - El Cajon Wesleyan Church	Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information.	04/19/07	25 Customers El Cajon
Libby Lake Community Center EVENT	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	04/21/07	250 Chula Vista Customers
Spring Into Health EVENT	Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information.	04/21/07	30 Spring Valley Customers
Presentation - South County Action Network	Customer Assistance Info. (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information.	04/24/07	15 Chula Vista Customers
Chula Vista Old Public Works Yard EVENT	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	04/25/07	375 Chula Vista Customers
Health and Community Resources Fair EVENT	Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information.	04/28/07	68 El Cajon Customers

SDG&E Nineteenth Annual CARE Progress Report

Attachment B – SDG&E CARE Outreach and Leveraging Through December 31, 2007

Activity	Summary	Timeline	Status/Results/Cost
Community Housing Works Presentation with Bulb Exchange	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	04/28/07	25 Poway Customers
Monte Vista High School EVENT	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	4/28/07	237 Spring Valley Customers
MAY 2007			
Vista City Hall EVENT	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	05/03/07	208 Vista Customers
Escondido Center for the Arts EVENT	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	05/12/07	317 Escondido Customers
Spring Garden Festival EVENT	CARE/FERA/DAP and other customer assistance information and energy-efficiency program and services.	05/19/07	100 Spring Valley Customers
Kmart Parking Lot EVENT	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	05/19/07	95 Ramona Customers
Adopt-a-Block EVENT	Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information.	05/19/07	200 San Diego Customers

SDG&E Nineteenth Annual CARE Progress Report

Attachment B – SDG&E CARE Outreach and Leveraging Through December 31, 2007

Activity	Summary	Timeline	Status/Results/Cost
Its How We Live EVENT	Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information.	05/24/07	200 Buckman Springs & Pine Valley Customers
Presentation - Safari Associates	Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	5/31/07	30 El Cajon Customers
JUNE 2007			
International Village Celebration EVENT	Information on all customer assistance and energy-efficiency program and services provided	06/2/07	250 San Diego Customers
Youth Education Workshop EVENT	Information on all customer assistance and energy-efficiency program and services provided	06/4/07	200 Jamul Customers
Casa Familiar Center EVENT	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	06/9/07	198 San Ysidro Customers
Presentation – San Juan Capistrano Senior Center	Information on all customer assistance and energy-efficiency program and services provided.	06/11/07	45 San Juan Capistrano
City Heights Urban Village EVENT	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	06/16/07	328 San Diego Customers

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Activity	Summary	Timeline	Status/Results/Cost
Kate Sessions Memorial Park EVENT	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	06/23/07	277 Pacific Beach Customers
Ocean Beach Farmers Market EVENT	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	06/27/07	275 Ocean Beach Customers
JULY 2007			
Oceanside Public Library EVENT	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	07/14/07	282 Oceanside Customers
San Diego Birch Aquarium EVENT	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	07/21/07	24 San Diego Customers
La Mesa Helix High School EVENT	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	07/28/07	305 La Mesa Customers
AUGUST 2007			
Lemon Grove Civic Center Park EVENT	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	08/04/07	111 Lemon Grove Customers
El Cajon Boys and Girls Club EVENT	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) And Energy Efficiency and Rebate	08/18/07	261 El Cajon Customers

SDG&E Nineteenth Annual CARE Progress Report

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Activity	Summary	Timeline	Status/Results/Cost
	information		
San Diego Birch Aquarium EVENT	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	08/18/07	28 San Diego Customers
SEPTEMBER 2007			
San Diego North Clairemont Rec Center EVENT	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	09/08/07	312 San Diego Customers
Spring Valley Library EVENT	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	09/15/07	11 Spring Valley Customers
OCTOBER 2007			
Clairemont Service Center EVENT	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	10/04/07	34 San Diego Customers
Kearny High School EVENT	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	10/06/07	259 Linda Vista Customers
Escondido Civic Faire EVENT	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate	10/13/07	225 Escondido Customers

SDG&E Nineteenth Annual CARE Progress Report

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Activity	Summary	Timeline	Status/Results/Cost
	Information		
South Chula Vista Branch Library EVENT	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	10/27/07	109 Chula Vista Customers
November 2007			
Presentation – St. Peter’s By The Sea	Information on all customer assistance and energy-efficiency program and services provided.	11/01/07	53 San Diego Customers
City Heights Urban Village EVENT	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information.	11/03/07	228 San Diego Customers
Salvation Army Center City EVENT	Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	11/08/07	69 Oceanside Customers
East County Kids Collaborative	Customer Assistance Info (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	11/16/07	23 San Diego Customers
Oceanside Public Library	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	11/17/07	190 Oceanside Customers

SDG&E Nineteenth Annual CARE Progress Report

Attachment B – SDG&E CARE Outreach and Leveraging Through December 31, 2007

Activity	Summary	Timeline	Status/Results/Cost
DECEMBER 2007			
San Marcos City Hall	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	12/02/07	198 San Marcos Customers
Poway Wal-Mart Parking Lot	Lighting Turn-In & Customer Assistance Table (CARE, DAP, Medical Baseline, etc.) and Energy Efficiency and Rebate Information	12/15/07	140 Poway Customers

SDG&E Nineteenth Annual CARE Progress Report
Attachment C – SDG&E Letter Agreement with DCSD
May 1, 2008



April 12, 2007

Mr. Lloyd Throne
Director
State of California
Department of Community Services
and Development
700 North 10th Street, Room 258
Sacramento, California 95814-0338

RE: Letter Agreement between the State of California Department of Community Services and Development and San Diego Gas & Electric Company for Leveraging and Reporting the California Alternate Rates for Energy Program Discounts and the State of California Low-Income Home Energy Assistance Program

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 200% of the Federal Income Poverty Guidelines. 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 20% reduction off the applicant's monthly gas/electric costs or charges.

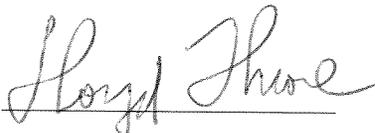
Both programs are operated year round. HEAP provides one-time assistance, per household, per program year (January through December). Applicants must reapply annually. CARE provides a continuous rate reduction throughout the year with the applicant re-certifying biannually.

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:



Lloyd Throne

Director,

Department of Community
Services and Development

4-19-07

Date



Gregg Lawless

Customer Assistance Manager

San Diego Gas & Electric

4/12/07

Date

Attachment D – Leveraging Data for DCSD

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

	Bill payment/credit	Total participants
Oct-06	\$13,471.60	135
November	\$5,284.74	36
December	\$12,111.07	74
Jan-07	\$19,072.34	102
February	\$27,580.72	128
March	\$44,164.47	210
April	\$31,695.00	150
May	\$21,948.45	111
June	\$27,767.22	135
July	\$20,831.63	103
August	\$32,716.11	156
September	\$28,980.25	138
Grand Total	\$285,623.60	1478

San Diego Gas & Electric Company CARE Program Discounts

Month	Electric Discount	Gas Discount	Total Discount	Total Participants
Oct-06	\$2,335,490	\$577,674	\$2,913,164	221,405
Nov-06	\$2,220,083	\$640,071	\$2,860,154	219,373
Dec-06	\$2,548,785	\$1,163,509	\$3,712,294	218,494
Jan-07	\$2,978,619	\$1,705,564	\$4,684,183	220,105
Feb-07	\$2,620,049	\$1,512,951	\$4,133,000	220,375
Mar-07	\$2,338,763	\$1,270,284	\$3,609,047	222,137
Apr-07	\$2,103,676	\$1,048,816	\$3,152,492	222,756
May-07	\$2,105,287	\$852,735	\$2,958,022	223,085
Jun-07	\$2,176,244	\$795,390	\$2,971,634	222,820
Jul-07	\$2,442,363	\$673,953	\$3,116,316	224,664
Aug-07	\$2,709,679	\$565,908	\$3,275,587	224,470
Sep-07	\$2,980,935	\$456,247	\$3,437,182	223,052
Totals	\$22,455,615	\$8,881,848	\$31,337,463	