

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

Application of Southern California Edison Company (U 338-E) for Approval of its 2012-2014 California Alternate Rates for Energy and Energy Savings Assistance Programs and Budgets.	Application 11-05-017 (Filed May 16, 2011)
Application of Southern California Gas Company (U904G) for Approval of Low-Income Assistance Programs and Budgets for Program Years 2012-2014.	Application 11-05-018 (Filed May 16, 2011)
Application of Pacific Gas and Electric Company for Approval of the 2012-2014 Energy Savings Assistance and California Alternate Rates for Energy Programs and Budget (U39M).	Application 11-05-019 (Filed May 16, 2011)
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**ANNUAL REPORT ACTIVITY OF SAN DIEGO GAS & ELECTRIC COMPANY
(U 902 M) ON LOW INCOME ASSISTANCE PROGRAMS FOR 2011**

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(U 904 G) ON LOW INCOME ASSISTANCE PROGRAMS FOR 2011**

This report presents the results and expenditures for San Diego Gas & Electric Company (SDG&E) California Alternate Rates for Energy (CARE) program and Energy Savings Assistance Program for program year (PY) 2011. The purpose of this report is to consolidate activity for the CARE program and Energy Savings Assistance Program, and provide the California Public Utilities Commission's Energy Division with all the necessary information to assist in analyzing the low-income programs.

Respectfully Submitted,

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ENERGY SAVINGS ASSISTANCE PROGRAM ANNUAL REPORT

1. Energy Savings Assistance Program Executive Summary

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

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

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

The long-term California Energy Efficiency Strategic Plan (Strategic Plan) lays out two goals in achieving the vision: 1) By 2020, all eligible customers will be given the opportunity to participate in the ESA Program, and 2) The ESA Program will be an energy resource by delivering increasingly cost effective and longer-term savings.

¹ The Energy Savings Assistance Program was formerly known as the Low-Income Energy Efficiency (LIEE) Program.

² D.07-12-051 at page 25.

³ *Id.*

In D.08-11-031, the Commission approved SDG&E's ESA Program design and budget for program years (PY) 2009-2011. SDG&E intends to support the Commission's key policy objective of making the Energy Savings Assistance Program a reliable energy resource and to achieve the adopted goal of reaching 25% of all SDG&E's willing and eligible households (within its territory) during the 2009-2011 program cycle.

In PY2010, SDG&E and SoCalGas jointly filed a petition for modification (PFM) of D. 08-11-031. The Commission's D. 10-12-002 will have positive future impacts on the ESA Program because the decision approved the inclusion of inadvertently omitted measures in the program, and authorized a memorandum account to track unanticipated and unforeseen Natural Gas Appliance Testing (NGAT) costs.⁴ Inclusion of the omitted measures will allow SDG&E to provide a wider array for measures for customers. The establishment of the memorandum account will allow SDG&E to track unexpected costs associated with increased NGAT activity for potential future recovery.

This report provides information on SDG&E's ESA Program accomplishments and expenditures for PY2011. In 2011, the SDG&E ESA Program exceeded its goal for the number of homes treated, as the program served 22,575 customers, which is 111% of the 2011 goal. The program spent 107% of its authorized budget, while achieving a 90 % very satisfied customer rating.

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

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

⁴D.10-12-002, at Ordering Paragraph (OP) 1.

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

Implementation Plan and Timeline		
Strategies	Near Term 2009 – 2011	IOU strategy employed this program year
Strengthen program outreach using segmentation analysis and social marketing tools.	<ul style="list-style-type: none"> • Identify, implement and evaluate effective marketing, education and outreach methods for targeting low income customer segments. • Use social marketing to effectively engage low income customers in program participation. 	<ul style="list-style-type: none"> • SDG&E continued to utilize customer segmentation data provided through Claritas utilizing PRIZM codes.⁵ The utilization of PRIZM codes allows for unique targeted messages, across selected channels designed for unique customer segments. • SDG&E continued to move deeper into the social media space to reach customers who will not respond to traditional tactics. This effort was based on results found in the SDG&E's Residential Customer Segmentation study conducted in October and November, 2011 via phone and web with 1,065 respondents. Results found that younger customers' are more likely to find information regarding the ESA Program online or through social networking. • SDG&E continued to build a more robust presence in the Community-Based Organization's (CBO) office space. Expanded outreach to very difficult to reach customers was expanded in 2011 by adding two outreach organizations focused on immigrant populations and the Vietnamese and Farsi speaking communities.

⁵ PRIZM codes are an area set of customer segmentation data widely used for marketing purposes in the United States. The data consist of demographic clusters that categorize every U.S. household into a segment. These segments were developed in part from the analysis of U.S. census data and categorize U.S. consumers into 14 distinct groups and 66 segments. The segments help marketers tailor content to consumers' needs and look at a variety of factors, including income, likes, dislikes, lifestyles and purchase behaviors.

Implementation Plan and Timeline		
Strategies	Near Term 2009 – 2011	IOU strategy employed this program year
<p>1.2: Develop a recognizable and trustworthy Brand/Tagline for the programs.</p>	<ul style="list-style-type: none"> • Develop a statewide program name and description for Energy Savings Assistance Program which is coordinated with the ME&O efforts for energy efficiency, demand response and any other demand-side options. • Implement branding. 	<ul style="list-style-type: none"> • SDG&E integrated the ESA Program wordmark into all customer facing program materials. All contractors were fully vetted on using the ESA Program name in all customer contact. All SDG&E internal organizations that have customer contact were educated to the branding change. With the development of the residential energy efficiency's Energy Upgrade California program (EUCa) & ESA Program worked together to ensure customers who were not qualified for ESA Program services were made aware of various offerings through EUCa. In addition, ESA Program customers were made aware of options for the Summer Saver program if they had operating central air conditioning systems.

Implementation Plan and Timeline		
Strategies	Near Term 2009 – 2011	IOU strategy employed this program year
1.3: Improve program delivery	<ul style="list-style-type: none"> • Use information from segmentation analysis to achieve efficiencies in program delivery. • Leverage with Local, State, and Federal agencies as well as other organizations to increase seamless coordination, efficiency and enrollment 	<p>SDG&E continued to utilize both segmentations analysis and targeted outreach tactics to drive awareness and enrollments in the ESA program. Outreach tactics were launched sequentially to ensure a customer received several notices of the ESA program. This allowed canvassing in these targeted neighborhoods to have a higher likelihood of enrollments due to customer awareness. In addition SDG&E provided signs for contractors to display outside of areas they were working to generate interest in that neighborhood.</p> <p>SDG&E continued to work with local government agencies, and their staffs to leverage their outreach efforts in targeted communities.</p> <p>SDG&E has leveraging agreements with two Low Income Home Energy Assistance Program⁶ (LIHEAP) contractors serving San Diego County. These contractors are able to serve customers under the LIHEAP program and the ESA program resulting in customers receiving more measures and driving efficiencies in both programs.</p> <p>SDG&E added a new Heating Ventilation and Air Conditioning (HVAC) contractor in 2011 to serve SDG&E's north county inland communities, reducing travel time for other HVAC contractors.</p>

⁶ LIHEAP is administered by the California Department of Community Services and Development.

Implementation Plan and Timeline		
Strategies	Near Term 2009 – 2011	IOU strategy employed this program year
1.4: Promote the growth of a trained Energy Savings Assistance Program workforce.	<ul style="list-style-type: none"> • Incorporate Energy Savings Assistance Program training needs into the Workforce Training needs assessment. • Develop Training Roadmap which includes funding requirements and sources other than IOUs. • Implement Energy Savings Assistance Program workforce education and training. 	<p>SDG&E worked with its Human Resources Department to coordinate activities related to Workforce Readiness. SDG&E believes these efforts are more effectively managed by Human Resources and individual ESA Program contractors hiring from the neighborhoods they serve.</p> <p>In 2011, the Statewide Energy Efficiency Workforce Education and Training (WE&T) team filed its training roadmap which identified a plan to reach “Disadvantaged Workers”. SDG&E’s WE&T group partnered with trade associations, community colleges and universities to expand its WE&T program offerings. For example, SDG&E began working with Cuyamaca Community College in 2011 to plan and launch the California Advanced Lighting Controls Training Program (CALCTP) in 2012.</p>

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

Implementation Plan and Timeline		
Strategies	Near Term 2009 – 2011	IOU strategy employed this program year
2.1: Increase collaboration and leveraging of other low-income programs and services	<ul style="list-style-type: none"> • Identify key areas where data sharing would be possible and advantageous. • Develop partnerships with community organizations and other agencies to leverage resources available from local governments, federal, state, 	<p>Customer confidentiality issues continue to be a barrier to getting this done. The IOU’s along with several LIHEAP contractors meet several times in an effort to complete a data sharing agreement. The biggest hurdle was the actual two way flow of customer information between the utilities and the LIHEAP funded CBO’s. CSD’s policy was that they would accept customer data</p>

Implementation Plan and Timeline		
Strategies	Near Term 2009 – 2011	IOU strategy employed this program year
	and private project funding sources.	from the IOUs but would not send data to the IOUs. This was not a viable solution. There was preliminary discussion on creating a central repository with customer information being managed by a third party. This did not move forward due to confidentiality and funding issues.
2.2: Coordinate and communicate between Energy Savings Assistance Program, energy efficiency and DSM programs to achieve service offerings that are seamless for the customer.	<ul style="list-style-type: none"> • Ensure Energy Savings Assistance Program participants are aware of energy efficiency and DSM/EE programs. • Coordinate with CSI programs to provide Energy Savings Assistance Program services in qualified low income housing for both single family and multi-family CSI programs. • Coordinate AMI delivery and Energy Savings Assistance Programs 	SDG&E has integrated the general energy efficiency, demand response and low income programs into one department under one director. The goal is to drive integration across the organization through an education and cross training approach. This will deliver a more comprehensive strategy to the market as program offerings become more targeted and segments are served more effectively. In addition, Outreach specialists are now trained to recognize opportunities where a customer may benefit from EE/DR options and to discuss those options during the assessment & enrollment process.
2.3: Provide low income customers with measures that result in the most savings in the Energy Savings Assistance Program.	<ul style="list-style-type: none"> • Assess design of programs to ensure increasingly cost effective measures, while reducing low-income customers' bills and improving quality of life. • Continue to include measures that provide long term energy savings, such as refrigerators. 	SDG&E continues to strive to install all feasible measures in a customer's residence. Major appliances such as refrigerators and high-efficiency (HE) clothes washers help to drive larger savings for customers. In-Home Education remains a key foundation in providing customers with targeted conservation behaviors and practices that can translate to more sustained savings.
2.4: Increase delivery of efficiency programs by identifying segmented concentrations of customers.	<ul style="list-style-type: none"> • Identify and develop segmented approach to deliver services to households • Improve use of CBOs in delivering services 	SDG&E continued to refine the segmentation analysis to drive enrollments across the low income population. Message and delivery channel are key in reaching these customers effectively. Increased customer response to outbound calling, email blasts and more targeted direct mail continue to deliver results in targeted segments. CBOs continue to help drive enrollments in hard-to-reach populations. Cultural, language and ethnic barriers are more readily overcome by CBOs that target these

Implementation Plan and Timeline		
Strategies	Near Term 2009 – 2011	IOU strategy employed this program year
		customers.

1.2 Energy Savings Assistance Program Overview

1.2.1 Provide a summary of the Energy Savings Assistance Program elements as approved in Decision 08-11-031:

Program Summary			
	Authorized / Planning Assumptions	Actual	%
Budget	\$ 19,619,144	\$20,950,509	107%
Homes Treated	20,384	22,575	111%
kWh Saved	8,575,260	7,345,831	85.6%
kW Demand Reduced	1,965	518	26.3%
Therms Saved	452,749	406,931	89.8%

1.3 Whole Neighborhood Approach Evaluation

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

SDG&E continued to utilize PRIZM codes as the foundation for its geographic segmentation strategy used to support its Whole Neighborhood Approach (WNA). SDG&E’s service territory was initially segmented according to zip codes and further segmented by a residential customer profile. This segmentation allowed for targeted messaging to customers with high potential for eligibility, and the utilization of customer’s preferred channels of communication enabled SDG&E to drive customer enrollment. For the WNA, a series of communication tactics such as direct mail, outbound calling, and door-to-door canvassing were deployed to potentially eligible customers within specific neighborhoods in an effort to focus contractor resources.

1.3.2 Provide a summary of the customer segmentation strategies employed (i.e. tools and analysis used to identify customers based on energy usage, energy burden and energy

insecurity) and how these customer segments are targeted in the Whole Neighborhood Approach to program outreach.

SDG&E assessed the three “most promising” household characteristics: need, willingness and accessibility as identified in the KEMA Report,⁷ to identify potential WNA neighborhoods. SDG&E continued to address each of these household types with a tailored approach and delivered targeted outreach in an effort to increase enrollment. For example, the majority of eligible ESA Program customers are low energy users. Because their gas and electric bills are so low, saving money on their SDG&E bill is not necessarily a top priority for them. Therefore as a way to gain customer interest in the program, SDG&E incorporated a message about making homes more secure and comfortable into the ESA Program marketing materials. For households with a high energy burden,⁸ saving money on their SDG&E bills is of greater concern and SDG&E highlighted the energy savings benefits of the ESA Program in its communications to these customers. For households with high energy insecurity⁹ SDG&E expanded its branch office outreach efforts to work with customers who typically pay their bills in person. The SDG&E customer service representatives can review the customer’s account to see if they are already participating in the CARE program and identify if their dwelling may qualify for the ESA Program by checking a report created for this effort. The report provides information on whether the dwelling was previously served, not served at all, or the date when it was last served. The accessibility of this information has resulted in an increase of enrollments from the branch offices, as it puts the representative at an advantage when they know which program(s) to offer and at that point, query the customer for eligibility and assist with enrollment. Since it is difficult to segment each of these specific groups by neighborhood, they became a subset of SDG&E’s WNA efforts. When SDG&E targeted a specific neighborhood with a large concentration of households meeting one or more of the “most promising” characteristics, the outreach campaigns were linked.

⁷ Phase II Low Income Needs Assessment Final Report prepared by KEMA, Inc, dated October 12, 2007.

⁸ The term “*high energy burden*” is defined as the “high cost of energy faced by low-income households relative to their total income.” Phase II Low Income Needs Assessment Volume 1 Final Report at p. 3-26.

⁹ The term “*high energy insecurity*” is defined at “the difficulties faced by low-income households in meeting their energy needs and pay their energy bills.” Phase II Low Income Needs Assessment Volume 1 Final report at p. 3.27.

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

SDG&E has not made any changes to its strategy for measure installations from previous years:¹⁰ SDG&E has also continued its practice of inspecting ESA Program measure installations, in accordance with the statewide Low Income Energy Efficiency Program Policy and Procedures (P&P) Manual as adopted by the Commission.¹¹ However changes have taken place in the identification and outreach, enrollment, and assessment areas. Details of the changes are described below.

Identification and outreach - Due to the effects of the downturn in the economy, customers, who may not have been eligible for the ESA Program in previous years, may qualify, and customers who had never needed to utilize social services or low income programs before, now need assistance. SDG&E continued to increase program awareness through mass media campaigns, special messaging on its website and outreach targeted specifically to the newly unemployed.

Enrollment- To make the enrollment process more streamlined and less cumbersome for customers, SDG&E continued to offer a direct connect feature to automated outbound calling, allowing more efficient screening and scheduling from one quick call. SDG&E also streamlined online applications being sent immediately to outreach contractors to try and decrease the time a customer waits for a call for a scheduled visit.

Assessment – SDG&E's outreach and assessment contractors have conducted ongoing training for their Energy Specialists on any new program policies and procedural changes. With the continued installation of HE clothes washers in 2011, outreach and assessment workers needed to be trained on the new installation feasibility criteria. With this additional training, the Energy Specialists were able to communicate to customers

¹⁰ Not all updates are related to WNA.

¹¹ Joint Ruling of Assigned Commissioner and Administrative Law Judge Approving the California Statewide Low Income Energy Efficiency Policy and Procedures Manual, dated August 31, 2010.

the benefits of installing this additional measure. SDG&E Field Specialists continued to assistance its Energy Specialists to determine whether measures could be installed in accordance the ESA Program’s feasibility criteria in order to set the appropriate expectation with customers and ensure that the customer experience is positive.

1.4 Energy Savings Assistance Program Customer Enrollment Evaluation

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

Through its Home Energy Assistance Tracking (HEAT) database, SDG&E maintains comprehensive records for customers served by the ESA Program going back to 1996. The customers who were served prior to 2002 may be eligible for certain “go back” measures if they still meet the ESA Program’s eligibility criteria adopted in D. 08-11-031.¹² SDG&E does not actively market to these customers because the goal of the ESA Program is to serve as many new customers as possible during the program cycle. If a customer contacts the ESA Program and has not been served by the program since 2002 or earlier or has a qualifying “go back” measure (refrigerator, attic insulation, furnace) SDG&E will re-qualify and serve that customer. This approach results in customers receiving services they are eligible for while keeping the program focused on new customers who have never received services. In 2011, SDG&E had 750 customers served as “go backs”.

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

On September 19, 2011 SDG&E’s CARE & ESA Program representatives hosted a joint utility meeting to discuss current Income Verification and Self Certification practices to ensure that processing groups are implementing the eligibility criteria consistently.

¹² D. 08-11-031, Ordering Paragraph (OP) 46.

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

SDG&E met its annual goal of number of households served during 2011.

1.5. Disability Enrollment Efforts

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

The ESA Program disability enrollment penetration for 2011 came in at 11%. See Section 1.5.4 below for information regarding the challenges faced by SDG&E in attaining the 15% disability enrollment goal.

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

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

For customers with visual impairments, SDG&E provides:

- Large-font printed materials
- Audio formatted communication on CD and cassette
- Program information booklets in Braille

For customers with hearing impairments, SDG&E provides:

- Videos in American Sign Language (ASL)
- ASL interpreters in the home when low-income energy efficiency services are being installed
- Closed-captioned videos
- Web link to SDG&E's programs through the Deaf and Disabled Telecommunications Program (DDTP)

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

SDG&E actively marketed the ESA Program with outreach efforts to 19 CBOs (list follows). Information is shared with the hearing impaired communities through an active web link on the DDTP. Video logs in ASL are posted on the Deaf Community Services of San Diego website and are available in DVD format through other organizations serving the needs of the disabled communities such as the San Diego Regional Center and the San Diego Health and Human Services Administration - Aging and Independent Services.

Provided below is a list of organizations serving the disabled communities that promote Energy Savings Assistance program:¹³

- Deaf Community Services of San Diego
- San Diego Center for the Blind
- Aging and Independent Services (San Diego In-Home Support Services Authority)
- San Diego Regional Center
- Access to Independence San Diego
- California Council of the Blind-San Diego Chapter
- National Federation of the Blind North San Diego Chapter
- Red Cross of San Diego
- Disability Rights California-San Diego Regional Office
- Elder Help of San Diego
- Southern Caregiver Resource Center
- United Cerebral Palsy of San Diego
- CA Department of Rehabilitation-San Diego District Office
- Toward Maximum Independence, Inc.
- Californians for Disability Rights-San Diego Chapter
- Employment and Community Options

¹³ Asterisk (*) shows organizations that SDG&E participated in meetings and outreach events.

- San Diego Mental Health Services
- Rebuilding Together San Diego
- San Diego Autism Society

2011 Disability Enrollments			
Source	Enrollments	Disability Enrollments	% of Disability Enrollments
Bill Insert	283	43	15%
Branch Offices	382	45	12%
Calling Campaign	1,749	306	17%
Canvassing	10,860	949	9%
CBO	175	12	7%
City/Government Municipality	6	1	17%
Contractor Referral	1,792	127	7%
Customer Referral	2,190	344	16%
Direct Mail	1,121	159	14%
Email Campaign	586	60	10%
Employee Referral	1,134	178	75%
Energy Savings Assistance Program Capitation	503	75	15%
Energy Savings Center	55	8	15%
Internal SDGE Programs	125	23	18%
Media	261	30	11%
Online Web	750	85	11%
Outreach & Marketing Team	16	3	19%
Outreach Events	90	8	9%
Source Not Identified	439	41	9%
Utility Referral	49	5	10%
Total	22,575	2,502	11%
Target Enrollment Rate	20,384	3,058	15%

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

SDG&E was unable to attain the 15% goal and it is continuing to hone the best marketing, outreach and enrollment strategies to target this unique community. SDG&E

continues to build its partnership network within the disabled community while being sensitive to the special needs of this community. SDG&E has a Market Advisor who is specifically assigned to work with the disabled community and CBOs that serve the disability community as a direct liaison to SDG&E programs and services.

An enhancement to the application process was implemented, based on clarification received in D. 10-12-002,¹⁴ which now allows SDG&E to better determine if anyone in the household has a disability. SDG&E has added an optional question on its application form which permits customers to self-identify if they, or someone in the household, have a disability.

SDG&E also provides ESA Program information in large font and Braille versions to customers with visual impairments and provides videos in American Sign Language (ASL) for customer with a hearing impairment. ASL interpreters are also available to customers at outreach events and in the home, and when the ESA Program measures are being installed, when requested by the customer.

SDG&E also works directly with organizations serving the disabled to ensure all eligible customers are provided program information and an opportunity to participate in the program if eligible. Organizations include but are not limited to the Deaf Community Services, Braille Institute, Center for the Blind, and Aging and Independent Services (see section 1.5.3 for comprehensive list).

1.6. Leveraging Success Evaluation, Including LIHEAP

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

¹⁴ Decision Granting, In Part, Petition of San Diego Gas & Electric Company and Southern California Gas Company to Modify Decision 08-11-031 at p. 5.

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

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

SDG&E continued to work closely with both its CBO community and the LIHEAP contractors to coordinate efforts to reach the low income segment. CBOs continued to receive training and coaching on how to engage customers in enrolling in the ESA Program. Often the visit to a CBO is for another issue and the CBO employee must work through the most pressing issue before addressing the utility programs with the customer. SDG&E's has worked closely with its partner agencies to drive enrollments in the population they serve. Through leveraging efforts with the LIHEAP contractors customers are served through both the state and utility programs allowing for the installation of all feasible measure some of which are only offered by one program.

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

Other benefits resulting from this particular partnership not captured under the 3 criteria described above is providing customers with a better overall service by simplifying and streamlining enrollment processes for customers and programs involved. Customers did not have to contact individual programs separately, thereby improving the level of service offered to customers. This resulted in customers receiving all feasible measure from both the CSD and SDG&E programs. This is an administrative cost savings for the programs, may deliver higher energy savings to the customers and allows delivery of the qualified

measures through the initial outreach and enrollment contractor. In 2011 there were 29 jobs leveraged with the CA LIHEAP.

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

SDG&E continued to work with its local LIHEAP agencies, Campesinos Unidos (CUI) and Metropolitan Area Advisory Committee (MAAC) to leverage customer enrollments where feasible. In 2011, SDG&E saw a reduction in leveraged enrollments. To encourage leveraging efforts, SDG&E reconnected with both agencies to identify issues and collaborated on possible improvements. SDG&E has found that some of reasons why the numbers of leveraged enrollments were dismal are because of other agency priorities or employee turn-over. SDG&E also continued to provide additional and new leveraging training for new staff in an effort to increase leveraging enrollments. For 2011, 29 enrollments were leveraged with our LIHEAP agencies.

1.7 Integration Success Evaluation

According to Decision 08-11-031, "Integration constitutes an organization's internal efforts among its various departments and programs to identify, develop, and enact cooperative relationships that increase the effectiveness of customer demand side management programs and resources. Integration should result in more economic efficiency and energy savings than would have occurred in the absence of integration efforts."

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

In 2011, SDG&E's CARE program and ESA Program work jointly to ensure that all qualified CARE and/or ESA Program customers are fully aware of their eligibility for both programs and are assisted in enrollments. SDG&E also took on initiatives to further integrate the CARE and ESA Program. The programs coordinated marketing efforts by strategically targeting customers for the separate program campaigns so these customers were not inundated with both messages at once. The programs also integrated back end

marketing processes, so all customer communication was aligned. Both programs were cross promoted in direct marketing, mass media and outreach tactics, and they began to work towards leveraging customer applications for the use of both programs.

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

In 2011, SDG&E ESA Program worked closely with SDG&E's residential energy efficiency program staff to integrate messaging to customers who may be able participate in ESA Program services or energy efficiency rebate programs. The program made some changes to communication pieces to the customer. The ESA Program added Home Energy Efficiency Survey (HEES) information to the letters that customers receive when their home was previously served by the program, and emails that the program contractors send to customers who have enrolled but are not responding to follow up calls. The programs also utilize outreach to communities, CBOs, and branch office locations to promote other residential programs.

In addition, the residential energy efficiency programs promote the Customer Assistance Programs in a number of ways. CARE and ESA Program are mentioned in the instructions of the Single Family Rebates Program Application. The Whole House Energy Savings Guide has a section on CARE, FERA, ESA Program and the Medical Baseline Allowance Program.

The ESA Program has supported the energy efficiency programs to launch the Energy Upgrade California Middle Income Direct Install Pilot (MIDI). The pilot is combining its outreach with ESA Program outreach and will offer the MIDI to customers who do not meet ESA Program income guidelines

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

In 2011, the ESA Program and Government Partnerships Program continued to identify opportunities to cross promote each other's services in customer communications.

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

In 2011, SDG&E supported energy efficiency's MicroGrid Pilot which is SDG&E's Transmission and Distribution Groups' demonstration project that will investigate improving the reliability of delivering electricity by providing local generation to select substations. Through this project SDG&E will select a representative substation and site a dedicated power plant to meet the energy needs of customers fed from the substation. Additionally, this project will investigate new communication and control strategies required to serve this unique "Micro Grid". The Program will implement a referral system to refer potentially eligible customers to the ESA Program. An agreement was also made to supply the energy efficiency's MicroGrid Pilot contractor with ESA Program fliers for distribution during outreach and on contractor bulletin boards for internal employees and clients.

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

In 2011, the ESA Program conducted the Low Income In-Home Display (IHD) and Programmable Communicating Thermostat (PCT) pilots. Enrollees for the pilots were taken from ESA Program participants. During the pilot, the participants took part in a four demand response events. During the demand response events, SDG&E automatically raised the temperature setting on the PCTs by four degrees, a change that customers could override either by pushing a button on their PCT, adjusting the temperature manually, or by changing their temperature settings on the energy management website. SDG&E did not automatically curtail any equipment for IHD pilot participants. Instead, the program anticipated that these participants would respond to event notifications by altering their own energy-using behaviors.

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

SDG&E worked closely with Grid Alternatives, who works directly with low income customers to facilitate the installation of Photo voltaic systems in both single family and multi-family residences. SDG&E expedited serving any ESA Program eligible customers with all feasible measures to ensure the solar installation for single family homes can be accomplished as quickly as possible. For multi-family units that may qualify for the Multifamily Affordable Solar Housing (MASH) program, which provides incentives for solar systems on qualifying existing affordable housing multifamily dwellings¹⁵, SDG&E worked with CBOs who may own and manage qualifying units are aware of the MASH program and that the ESA Program will serve their units prior to design work for the MASH program.

1.8 Workforce Education & Training

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

SDG&E's workforce efforts are coordinated through SDG&E's Human Resources department. The Workforce Readiness initiative is the guiding document that SDG&E uses to assess and plan for its future workforce.

The Energy Savings Assistance Program worked with local agencies focused on workforce readiness. Through a partnership with The Workforce Partnership and San Diego Urban Corp, at risk youth were trained to provide door-to-door canvassing in targeted neighborhoods promoting the ESA Program and CARE to potentially eligible customers.

¹⁵ The MASH program is administered by the California Center for Sustainable Energy in SDG&E's service territory.

In 2011, SDG&E was able to expand its efforts through the efforts of the SDG&E Energy Innovation Center. SDG&E offers educational and technical seminars for businesses including topics such as, HVAC, lighting, motors, demand response, and sustainability. These workshops are targeted towards specific industries and associations which allow attendees to network and learn alongside others in their industry. The primary objective of the education & training program are to:

- Educate customers
- Increase awareness and knowledge of:
 - The significance of energy efficiency
 - The regional, individual economic and environmental benefits.
 - Make sure customers are aware of our programs and services.

This program serves both the residential and non-residential sectors.

In 2011, a total of 138 training classes were held at the facility.

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

Type of training or recruitment conducted	Employees trained ¹⁶	Employees hired
Safety & Operating Efficiency Seminars	372	NA
Technical Seminars	6,788	NA
Technical Training	155	NA
Total	7,315	

1.9 Legislative Lighting Requirements Status

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

¹⁶ This represents the number of contractor employees trained.

SDG&E allows its contractors to procure CFL's from Lights of America under the agreement negotiated by SCE for all of the electric utilities. SDG&E contractors have not reported any problems in procuring CFLs for the ESA program.

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

SDG&E provides information to each enrolled customer on the proper disposal of CFL's. This information is reviewed with the customer during the enrollment process.

1.9.3 Complete Table 16 (in Appendix). In addition, please briefly summarize the CFL procurement process for the IOU, including manufacturers, distributors, warehousing, and contractor delivery.

SDG&E does not directly procure the CFLs used in its ESA Program for its contractors. Contractors purchase directly from Lights of America under a master contract negotiated by SCE on behalf of all of the IOUs as part of a statewide RFP.

1.9.4 Provide a summary of IOU activities in preparation for a draw down of CFL-supporting subsidies at the end of the 2009-2011 cycle, and where, as experienced by the IOU, they feel new lighting technologies could be used in the Energy Savings Assistance Program.

SDG&E understands that the continued subsidy of CFL's in the next program cycle may draw down as the CFL product matures and is able to stand alone in the consumer market. SDG&E utilizes the CFL primarily as an offering to pique customer interest in participating in the ESA Program.

SDG&E introduced LED nightlights a number of years ago to introduce residential customers to the new technology. Currently, the LED technology is still too expensive to be introduced into the ESA Program. If and when the technology becomes more affordable and is able to meet the Commission's adopted cost-effectiveness thresholds, SDG&E will consider adding this technology as a measure to the ESA Program.

1.10 Studies

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

Four statewide studies were planned for the 2009 to 2011 program cycle. These include: (1) an impact evaluation, (2) a process evaluation, (3) a study of non-energy benefits, and (4) a study of refrigerator degradation. Each of these is described below.

(1) Joint Utility¹⁷ 2009 LIEE Impact Evaluation

The prime research contractor for the 2009 impact evaluation was ECONorthwest. Energy Division staff selected the contractor and managed the study. SCE held the contract with the contractor for the project.

The objective of the impact evaluation was to provide electric and gas savings estimates by measure, utility, household, weather zone, and other relevant dimensions for the 2009 LIEE Program. The results were used to quantify the 2009 program achievements and to estimate savings for the PY2012 to 2014 program application.

The impact evaluation conducted during this program cycle focused additional resources on understanding behavioral and/or housing-related variables relevant to heating and cooling Impacts. In particular, more in-depth data were collected and further analyses were conducted on furnaces and evaporative coolers.

The primary analyses of the data were done via utility billing data. Additional primary data collection included phone surveys with participants and non participants; as well as in-home audits and interviews with a smaller sample of participants. Engineering analyses of some small and new measures were also conducted. In the end, while the study made use of extensive data collection via phone surveys and onsite audits, the evaluators concluded that the additional data

¹⁷ The Joint Utilities are PG&E, Southern California Edison Company (SCE), Southern California Gas Company (SCG), and San Diego Gas and Electric Company (SDG&E).

was not as useful as they had hoped and the primary tool of analysis was still a billing regression model.

The study found that in general the impacts for the 2009 program were lower than the 2005 program (the year the last impact evaluation was conducted), and this was particularly true for the gas measures. As was the case in 2005, refrigerators and lighting still accounted for most of the program savings.

The evaluation commenced with a kickoff meeting for all interested parties in September 2009. A draft report was completed in March 2011 and followed by a public workshop on March 28, 2011. Results from the draft report were used in the 2012-14 Application. The final report was issued in June 2011 with slightly altered results based on comments from the workshop and additional analysis. The study is now complete and the final report is available at: http://www.calmac.org/publications/LIEE_FINAL_2009_Impact_Eval_Report.pdf

(2) Joint Utility LIEE Process Evaluation

The prime research contractor for the process evaluation was Research Into Action. Energy Division staff confirmed the selection of the contractor and managed the study with the assistance of the IOU's. PG&E held the contract with the contractor for the project.

The purpose of the study was to evaluate the effectiveness of the program design and delivery strategies and provide recommendations for improvement. Data collection for this project included reviews of program tracking data, interviews with program managers, telephone surveys of program participants and nonparticipants, telephone interviews and focus groups with contractors, and ride-alongs with contractors.

The statewide process evaluation commenced with a kickoff meeting for all interested parties in August 2010. A draft report was delivered February 25, 2011, followed by a public workshop to discuss the results. The final report was issued June 10, 2011.

The results and recommendations provided by this study were considered in various process related activities and improvements that were incorporated into the 2012-14 Application.

The study is now complete and the final report is available at:

http://www.calmac.org/publications/LIEEFinal_Report_w_study_number.pdf

(3) Joint Utility Non-Energy Benefits (NEBs) Study

The Non-Energy Benefits (NEBs) Study was a statewide study managed by San Diego Gas & Electric. The Study was originally designed to be carried out in two phases. The prime research contractor for the first phase of the Non Energy Benefits evaluation was Skumatz Economic Research Associates (SERA) with The Cadmus Group as a subcontractor. A statewide advisory group selected the contractor and SDG&E managed the study and held the contract for the project.

The purpose of phase one was to review the available literature on non-energy benefits and provide a brief summary and recommendation for a methodology to update the current non-energy benefit values used for the ESA program. The project involved an extensive literature review and synopsis of relevant ranges of NEB values that are used in other programs across the country.

Phase 1 commenced with a kick-off meeting for all interested parties in August 2009. A draft report of phase 1 was presented in December 2009. A public workshop was held in May, 2010 after which time a final report was issued. The results of this secondary research showed that the NEB values currently used by the ESA program fall within the range of values reported for various energy efficiency programs across the country. Further analyses combined with the results of the first phase of the project led the statewide advisory group to concur that pursuing the second phase of the project would not be an optimal use of the remaining funding allocated for the project at this time. The study is now complete and the final report is available at: <http://www.liob.org/docs/Non%20Energy%20Benefits%20Study%20-%20SERA%20Inc%20%202010.pdf>

(4) Joint Electric Utility Refrigerator Degradation Study

A refrigerator degradation study was undertaken by the Joint Electric Utilities to determine which, if any, alternate refrigerator replacement criteria would lead to maximum, cost-effective energy and demand savings for the ESA program. Specifically, the Utilities were looking for a set of criteria to judge when refrigerators could be replaced by the program.

Pacific Gas and Electric (PG&E) held the contract and managed the project on behalf of the Joint Electric Utilities in conjunction with Energy Division. In 2010, an RFP was issued and no proposals were received. Subsequently, KEMA indicated interest and submitted a proposal to conduct this research. KEMA executed the work in two phases.

The study was designed to examine age-based and other replacement criteria that would optimize savings opportunities for this measure. Currently, ESA program participants are eligible for a new energy efficient refrigerator if their primary refrigerator was manufactured before 1993. ESA program statistics suggest that the pre-1993 refrigerator replacement market is nearly saturated as evidenced in the declining number of eligible refrigerators identified and replaced through the ESA Program; however, the Joint Utilities believe energy efficient refrigerators are still one of the most cost-effective, energy-saving measures in the ESA program. This study was undertaken to update refrigerator replacement criteria to garner new, significant and cost-effective energy savings for the Program.

Some initial analyses conducted by KEMA during Q1 of 2011 resulted in a preliminary memo provided to the Joint Utilities and Energy Division in April, 2011. Following this initial work, KEMA gathered additional program-specific data from the Joint Utilities and provided a second memo which updated the results produced in April, projected results for multiple criteria through 2015, and provided suggestions for further research. Overall, KEMA's analysis showed that replacement of refrigerators manufactured after 1993 remains a cost-effective source of energy and demand savings to include in the 2012-2014 ESA Program portfolio, and based on these results, the Joint Electric Utilities proposed changing the replacement criterion to include refrigerators manufactured before 1999. The study is now considered complete.

1.10.2 If applicable, submit Final Study Report describing: 1) Overview of study; 2) Budget spent vs. authorized budget; 3) Final results of study; and 4) Recommendations.

See Section 1.10.1 for summaries of the Studies. Links are provided for the final reports. The authorized budget for the NEB study was \$300,000 (for a planned two-phase study), and the total expenditures for the completed one-phase study came to \$123,853.

1.11 Pilots

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

The ESA Program partnered with SDG&E's Smart Meter Home Area Network (HAN) team and a third party vendor (Tendril) to implement a HAN pilot during the summer of 2011. The primary objective of the pilot was to test the HAN devices and to assess customer acceptance. The devices were provided at no charge. Participants were divided into two groups; one group received an In-Home Display (IHD) and the second group received a Programmable Communicating Thermostat (PCT). Both groups were given access to a website hosted by Tendril that provided additional information on their energy usage.

The original targets for participation were 300 IHDs and 250 PCTs through an opt-in invitation; actual participation included 273 IHD and 66 PCT customers. Eligibility requirements included average monthly usage of at least 275 kWh, single-family home ownership, high speed internet service with available router port, and participation in ESA within the previous five years. The PCT group was also required to have a working air conditioner.

Energy savings for the pilot were extremely low or not measureable. Four demand response events were called during the summer, although one of those events was canceled due to a system-wide outage. Load impacts for the remaining three events were minimal. Customers surveyed after the pilot responded positively to the technology and reported using it mostly as an education tool to understand how their various appliances and equipment contributed to their overall energy usage. Customers also reported still regularly using the IHDs even after the pilot was over and were enthusiastic about using the technology to learn more about their energy consumption.

SDG&E experienced significant loss of connection problems with the devices during the pilot. One of the lessons learned from the pilot is that the devices will need ongoing

monitoring and quality control. In addition, some customers reported that the devices were not user friendly and some also reported needing assistance in programming the PCT.

Overall, the pilot's objectives were successfully met. SDG&E learned a great deal about the devices which can be used to improve delivery of this type of program in the future. In addition, customer response was overall extremely positive despite the comments by a few customers related to ease of use. A process evaluation was conducted by Research Into Action and a final report will be provided when finalized.

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

The final report for the SDG&E Pilots will be completed by June 2012 meeting the requirement to provide final pilot reports within 180 days of completion of the pilots.

1.12 "Add Back" Measures

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

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

So long as the Commission continues to provide sufficient program funding, the inclusion of "add backs" in the current program will not impact SDG&E's ability to meet the 2020 plan goal that 100% of eligible and willing customers will have received all cost effective Energy Savings Assistance Program measures because the number of add back measure is a small amount of the overall program budget. Through effective program management, SDG&E is able to control

program costs and deliver all feasible measures to customers. The total count and expenditures for “add-back” measures are provided in Table 18. Because SDG&E does not anticipate any impacts to the program, it will continue to install “add-back” measures when feasible. SDG&E is committed to providing Energy Savings Assistance Program customers with the best quality of services. SDG&E is also committed to achieving the Commission’s goal to enroll and service all willing and eligible customers. To do so, SDG&E requires adequate program funding, including funds for add-back measures.

2. CARE Executive Summary

2.1 Participant Information

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

TABLE 1			TABLE 1		
Residential CARE Program Electric Customers by Month			Residential CARE Program Gas Customers by Month		
PY2011	CARE Customers	Percentage Change	PY2011	CARE Customers	Percentage Change
Jan	296,430	1.02%	Jan	199,971	0.98%
Feb	297,666	0.42%	Feb	200,616	0.32%
Mar	299,419	0.59%	Mar	202,324	0.84%
Apr	300,424	0.33%	Apr	202,851	0.26%
May	302,886	0.81%	May	204,457	0.79%
Jun	301,544	-0.45%	Jun	204,032	-0.21%
Jul	305,222	1.21%	Jul	206,353	1.12%
Aug	305,264	0.01%	Aug	205,893	-0.22%
Sep	306,544	0.42%	Sep	207,073	0.57%
Oct	308,590	0.66%	Oct	210,451	1.61%
Nov	307,512	-0.35%	Nov	207,644	-1.35%
Dec	308,596	0.61%	Dec	208,592	0.45%

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

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

SDG&E and the other IOUs use the joint utility methodology adopted by the Commission in D. 01-03-028 to develop quarterly and monthly penetration rates for 2011. This method entails annual estimation of eligibility for CARE and the ESA Program, and other income-by-household size parameters at the small block area (block group, census tract, zip) for each IOU service territory and for the state as a whole. Sources for this information include the Commission’s current income eligibility guidelines, current year small area vendor distribution on household characteristics, Monthly Current Population Survey data (“CPS Monthly”, U.S. Census); Census Public Use MicroData Sample (PUMS); 2005-2009 American Community Survey (ACS/UMS,” U.S. Census); and Integrated Public Use MicroData Services (“IPUMS-CPS,” Minnesota Population Center, University of Minnesota); Labor Market Information Data (“EDD/LMID”); California Employment Development Department and additional vendor data sources, including projected small area unemployment data from Synergos Technologies, Inc., and Environmental Systems Research Institute, Inc. Estimates from the block group level are aggregated to county/utility and whole utility level among other aggregations. Annually, the utility applies count/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, SDG&E counts the number of households (by small area, by county, and overall) that are enrolled in CARE. The CARE household total, including individually metered and sub-metered occupied housing units, is divided by the total income/demographic eligibility to provide the monthly penetration rate.

In D. 06-12-038, the Commission granted the Joint Utilities’ request to file the annual CARE eligibility estimates on October 15 of each year. The updated CARE eligibility

estimates for 2011 was submitted to the Commission on December 30, 2010 by Southern California Edison Company on behalf of itself and the other IOUs.¹⁸

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

To derive the estimates of current CARE-eligible meters, SDG&E counted all residential meters and residential sub-metered units and subtract the residential accounts with billing tariffs that do not qualify for CARE. This calculation equals the number of eligible residential meters for the CARE program in SDG&E's service territory.

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

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

2.1.2.4. Describe how current CARE customers were counted.

Current CARE customers were counted by tallying the number of individually metered residential customers with an active CARE enrollment status, plus the number of sub-

¹⁸ On October 15, 2010, Administrative Law Judge (ALJ) Kim issued a Ruling that granted the Joint Utilities an extension until December 31, 2010 in which to file the annual estimates for 2011 due to a delay in the expected ACS/PUMS data release.

metered tenants receiving service through residential master-metered accounts participating in the CARE program.

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

The formula for calculating CARE-penetration rates is:

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

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

Electric - 29.16%

Gas – 28.48%

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

Electric – 21,015

Gas – 16,061

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

Electric - 15,438

Gas - 13,327

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

Electric – 73%

Gas - 83%

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

SDG&E continued to focus on increasing participation for tenants of sub-metered facilities. SDG&E worked with a door-to-door contractor to target sub-metered facilities in order to improve participation. While the effort was successful, it was not without issues. After a period of time, SDG&E received several calls that questioned the integrity of the information provided on the applications submitted by one of the employees. SDG&E immediately addressed the issue with the contractor and worked to ensure the issue was resolved timely. In order to ensure the accuracy of the information on the applications, SDG&E initiated a Quality Assurance Renewal Application for the tenants enrolled by the contractor's employee. As of year-end, SDG&E had mailed the first request and was in the process of gathering information to initiate a second request to non-responders. SDG&E intends to make several attempts prior to removing any tenants from the CARE and anticipates concluding this process in early 2012.

2.2 CARE Program Summary

2.2.1. Please provide CARE program summary costs

CARE Budget Categories	Authorized Budget	Actual Expenses	% of Budget Spent
Outreach	\$1,734,261	\$1,817,774	105%
Proc., Certification and Verification	\$230,015	\$253,704	110%
Information Tech./Programming (1)	\$452,687	\$236,731	52%
Pilots (2)		\$0	0
Measurement and Evaluation	\$4,326	\$13,350	309%
Regulatory Compliance	\$196,401	\$149,290	76%
General Administration	\$423,927	\$378,039	89%
CPUC Energy Division Staff	\$102,900	\$31,620	31%
Cooling Centers (3)		\$0	0
Total Expenses	\$3,144,517	\$2,880,508	92%
Subsidies and Benefits (4)	\$49,919,937	\$63,577,305	127%
Total Program Costs and Discounts	\$53,064,454	\$66,457,813	125%

2.2.2. Please provide the CARE program penetration rate to date

CARE Penetration			
Participants Enrolled	Eligible Participants	Penetration rate	Target Met?
308,596	362,551	85.1%	No

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

SDG&E did not receive any complaints regarding the CARE Recertification process during the 2011 program year.

2.3 CARE Program Costs

2.3.1 CARE Discount Costs

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

Gas - \$5.13

Electric - \$13.33

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

Gas - \$13,708,148

Electric - \$49,869,157

2.3.2 Administrative Cost

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

See Section 2.2.1 or CARE –Table 1 in the attachments to this report.

2.3.2.2 Explain what is included in each administrative cost category.

Outreach: This category represents all costs for printing and mailing of CARE applications/documents, printing and mailing of the annual notification, postage, bill inserts, brochures and flyers, advertising, targeted direct mail and telephone campaigns, community event sponsorships and support, distribution of collateral materials, outreach staff labor, and other outreach and enrollment efforts. Capitation payments¹⁹ and any agency-related outreach support efforts are also included in this category.

Processing, Certification and Verification: These 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/data entering all CARE applications; 3) initiating and responding to customers' inquiries regarding CARE applications/program; 4) fielding telephone calls related to CARE program participation; and, 5) resolving billing issues related to CARE program enrollment.

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

Measurement and Evaluation: Costs for measurement and evaluation includes contract and staff labor expenses for CARE participant eligibility updates are tracked in this category.

¹⁹ Capitation payments are compensation fees paid to third-parties and community-based organizations that facilitate CARE enrollment for eligible hard-to-reach customers.

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

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

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

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

Electric CARE - \$18,974,225 under-collected balance

Gas CARE - \$3,761,779 under-collected balances

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

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

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

See CARE-Table 10 in the Attachments.

2.4 Outreach

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

Direct Marketing: Channels of communication directly targeted towards customers. In 2011, direct marketing efforts included direct mail, automated voice messaging (AVM) campaigns, email campaigns, bill inserts and door to door campaigns.

- **Direct mail-** SDG&E used targeted direct mailings to raise program awareness and drive customers toward paperless enrollment options such as the CARE IVR and the program's online enrollment form. In the past, targeted direct mailings included a letter and application which customers would fill out and mail back. SDG&E developed a paperless solution to try and mitigate the processing time for customers. In 2011 SDG&E mailed out approximately 110,000 postcards which detailed the program benefits, how to qualify and where to apply. Customers were encouraged to go online or call the program's IVR number to enroll.
- **Automated Voice Messaging (AVM) Campaigns–** SDG&E conducted monthly AVM campaigns to potentially eligible customers. Contracting with a third party, SDG&E administered the calls through an outbound dialing system. The system allowed SDG&E to contact thousands of customers in a designated time frame. The campaign utilized a script that was developed by SDG&E to capture customer information including household size, household income and enrollment in any public assistance programs. In 2011, over 13,000 customers were enrolled using AVM efforts. AVM was also used to renew CARE customer's eligibility. SDG&E launched an AVM campaign as a first step to CARE customers due to renew their eligibility with the program. In 2011, over 4,000 customers chose to renew their eligibility this way. Customers who chose not to use the phone to renew continued down the path of regular recertification and received two renewal letters.

- **Email campaigns** – SDG&E used email to contact customers with messages about the CARE program. SDG&E leveraged with the company’s paperless billing option, My Account to obtain customer emails. SDG&E was able to tailor subject lines, content and creative based on the audience. The CARE emails generated an average unique open rate (how many recipients open the email) of 41%, well above the industry standard of 23%.
- **Bill inserts** – SDG&E conducted the annual notification to all non-CARE customers in July with a CARE application inside customer bills. In December a bilingual notification was also inserted in all non-CARE customer bills. The notification was not an application but rather a notice that detailed the program benefits, how to qualify and where to apply. Enrollments from bill inserts totaled approximately 1,060 in 2011.
- **Door-to-Door – Contracting with a third party-** SDG&E targeted hard to reach neighborhoods by knocking on doors and using personal interaction with customers to explain the program. SDG&E provided training to the third party vendor as well as provided them lists of neighborhoods to infiltrate. Door to door contractors were able to interact with customers face to face, explain the program qualifications and benefits, and enroll customers on the spot. In 2011, approximately 7,445 customers were enrolled in the program using the door to door process.
- **Internal Leveraging** - Utilizing resources within SDG&E, opportunities for mentioning the CARE program alongside other initiatives included; interactive voice response, customer contact employees, branch offices, field collection and calls, and informational brochures.
- **Interactive voice response (IVR)** - SDG&E’s customer contact center assists customers with a variety of inquiries on a daily basis. Messages heard by customers on hold provided information about the CARE program in both English and Spanish. Customers are also provided the option to request a CARE

application through this process. In 2011, 4,357 applications were requested in English and 750 were requested in Spanish.

- **Energy Service Specialists** -- SDG&E's customer contact center continues to advise customers of the CARE program. Energy service specialists (ESS) advise customers with high bills or those inquiring about past due amounts of resources available to them such as the CARE program. ESS continued to be advocates for the program and in 2011 brought in over 9,000 enrollments for the CARE program.

Branch Offices –

- Customer Assistance leverages the resources of all five of SDG&E's bill payment locations to enroll customers in the CARE and Energy Savings Assistance programs. Customer service representatives offer program benefits to customers as they come in to pay their bills.
- Marketing screens and messaging regarding the CARE and Energy Savings Assistance Program prints on the receipts of the ExpressPay machines, as implemented in 2010, and in 2011 they continue to provide customer assistance program information to customers who use them. 10 ExpressPay machines are available as an alternate payment option for customers.
- In 2011, the branch offices generated 5,426 new CARE enrollments and 447 new Energy Savings Assistance Program enrollments.

Field Collection – SDG&E field collectors deliver notices to customers facing disconnection. During this process, the collectors leave CARE program information for customers.

Collection Call – SDG&E provides an additional outbound telephone call with a follow up letter to customers facing collection activity on their accounts. Information about the availability of payment arrangements and assistance programs is detailed in the letter.

Informational Brochures – New residential customers entering SDG&E’s service territory for the first time receive a welcome packet. The packet includes information for the first time customer as well as a CARE application. The application is included in both the English welcome packet and the Spanish welcome packet. In 2011 over 115, 000 English welcome packets and over 4,000 Spanish welcome packets were mailed to new customers.

Mass Media: Print, TV, radio, and online media efforts that were pooled used in conjunction with one another to promote the program alongside the surrounding direct marketing efforts.

Print – SDG&E targeted Chinese, Vietnamese and Filipino communities with in-language print ads in various newspapers. The print ads featured program information including qualifications, benefits and how to apply. SDG&E also used outdoor media in the form of bus shelter ads. The bus ads, featured in Spanish, Vietnamese, and Tagalog, were placed in hard to reach ethnic communities. The ads explained the program benefits and how to apply.

TV – SDG&E used thirty and fifteen second commercial to raise overall program awareness on a larger scale. The commercials aired on various English and Spanish television channels and explained the benefits of the program and how to apply.

Radio – SDG&E worked with Univision to feature a customer as part of a radio show using a popular Hispanic radio personality. Two customers participated in a two separate radio shows alongside a representative from SDG&E. Both customers were able to share their own experience of how they enrolled in the program, how the program helped their families, and the overall positive experience they had in dealing with SDG&E.

Online – SDG&E used paid search and display ads to generate program awareness and steer customers to the application online. Paid search allowed SDG&E to place ads in search engines such as Google, Yahoo, and Bing. The advertisements displayed as a top listing on a search page when customers searched keywords related to the program. SDG&E also used display ads; the placement of program banner ads on select websites. The websites were selected based on demographics and audience behaviors that they were likely to attract. In 2011 SDG&E used three primary categories of display purchases; local news such as SignonSanDiego, ad networks such as ValueClick, and publisher sites such as Careerbuilder.

General Outreach: In 2011, outreach efforts included participation in community events, public speaking engagements and leveraging efforts with community and government agencies. These opportunities target a diverse audience including new immigrants, those with limited English proficiency, seniors, and people with disabilities. Information on all customer assistance programs; CARE, Energy Savings Assistance Program and Medical Baseline Allowance program is shared through all efforts, in addition to help in completing program applications.

Community Events

SDG&E and its partners participated in and sponsored a variety of local events to educate customers about assistance programs available to low-income customers and assist eligible customers with enrollment opportunities. SDG&E representatives participated in 189 community events (including 11 speaking engagements, and collaboration with the energy efficiency groups in 12 Lighting Turn In Events, and seven Smart Meter Company-initiative sponsored events). Sample of events included the following by target audience:

Seniors:

Successful Aging Expo
Multi-Cultural Resource Expo and Screening for Seniors & Families
Coronado Senior Fair
Cool Zone Kick-Off

Disabled:

Transportation & Mobility Expo
Sharp Hospice Care Resource & Education Expo
Deaf Awareness Day

Multilingual Multicultural:

Juneteenth - Black Independence Day
Community Health Fair - Familias Sanas Y Activas
El Cajon Library - Multi-Cultural Family Festival
7th Annual Somali American Cultural Festival

Schools:

Grossmont College Extended Opportunity Programs & Services
Kaplan College Student Resource Fair
Cal Fresh Program - SD Food Bank - Johnson Elementary School

Other:

Bahia Resource Hotel Employee Resource Fair
Community Cares Put Pride Aside Campaign - SD Food Bank (food distribution)
Smart Money Summit 2011
Neighborhood House Association-Free Rental Assistance Workshop

Leveraging with Local Government Agencies

San Diego County Health & Human Services Agency (HHSA)

Partnerships with two branches of HHSA are in place to promote the customer assistance programs.

- Aging and Independent Services Cool Zones - For the 11th year, SDG&E partnered with Aging and Independence Services which helps seniors and people with disabilities stay cool during hot summer days through the Cool Zone program. This year the Cool Zone program answered 930 calls for information on Cool Zone locations, and provided 50 bus passes for those who lack transportation to get there. For the homebound disabled who may not be able to travel to a Cool Zone location, the program distributed 148 fans.
- Family Resource Centers for CalWorks Program – Nine resource centers offering CalWorks intake applications are participating in promoting the CARE program and offering enrollment opportunities to their customers. 90 enrollments were generated in 2011 through these efforts. Customers participating in CalWorks are automatically eligible for the CARE program through categorically eligibility.

Multilingual Multicultural Outreach

In May of 2011, SDG&E launched a multicultural multilingual outreach project designed to reach hard-to-reach diverse communities that might otherwise be unaware of the customer assistance programs. The outreach was conducted by two outside contractors with expertise in in-language and cultural services: The Harris Group and Catholic Charities were tasked with providing Customer Assistance program information in-language and in-culture with focus on African immigrants, African Americans, Vietnamese and Arabic speakers. Both contractors participated in a myriad of outreach activities to reach the targeted populations where they gather for worship, shop and recreate such as churches, food markets and ethnic festivals. Their combined efforts

raised program awareness with thousands of people and brought in 479 new CARE enrollments and 182 Energy Savings Assistance Program enrollments.

Capitation Contractors

- SDG&E leverages the resources of community-based organizations (CBOs) and agencies referred to as Capitation Contractors, to help enroll customers in the CARE and Energy Savings Assistance Programs. These organizations leverage existing relationships with low-income clients to extend CARE and ESAP program benefits as part of their total assistance offering. As an incentive, SDG&E provides Capitation Contractors with a fee for each new CARE enrollment generated.
- In an effort to maintain relationships with these organizations and keep the Energy Savings Assistance Program and CARE programs top of mind, SDG&E visits most agency sites each week, delivers collateral material and provides training to their staff as needed.
- Efforts through this collaboration brought in 3,810 new CARE enrollments and 102 Energy Savings Assistance Program enrollments.

2-1-1 San Diego

2-1-1 San Diego is a resource and information hub that connects people with community, health and disaster services through a free confidential phone service and searchable online database. SDG&E leverages the resources of 2-1-1 San Diego to promote CARE, ESAP and Medical Baseline programs. In 2011, their screening and assistance efforts generated 2,386 new CARE enrollments and 441 Energy Savings Assistance Program enrollments, they also mailed 1,710 Medical Baseline Allowance program applications to potential eligible customers.

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

SDG&E interprets the most successful outreach method as the method that brought in the greatest number of enrollments at the least cost. In 2011, the most effective outreach method was the AVM campaigns as they brought in the greatest

number of enrollments for any single outreach touch point. Over 13,000 customers used this method to enroll in the program. At a cost of \$5.35 per enrollment, it was also the least expensive outreach method.

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

Barrier: Cultural or language barrier expressed by partner community agencies

Mitigation:

- In-language promotional posters and sub-titled program videos developed, specifically in Arabic and Vietnamese, and distributed to partner community agencies serving such markets.
- Launched multicultural multilingual outreach project, targeting African Immigrants, Arabic and Vietnamese speakers, in-language and in-culture, by contracting with expert organizations.

Barrier: Unable to contact customers who provide a cell phone number to the utility through AVM campaigns. Due to marketing restrictions to cell phones, the program is only able to call customers who provided a landline phone number, resulting in a significant loss in customer lists, often times, half the marketing list is not usable.

Mitigation:

SDG&E comprised customer lists using the cell phone criteria and used other direct marketing tactics such as direct mail and email to reach these customers.

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

SDG&E and Southern California Gas Company (SoCalGas) exchange a data file of the shared services territory in Southern Orange County. SDG&E conducts a data match of all CARE customers in that shared territory. If a customer is enrolled in the

CARE Program at SoCalGas and not at SDG&E they will then automatically be enrolled and the reverse is done for SDG&E CARE customers.

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

SDG&E's Energy Savings Assistance Program provides recipients of Energy Savings Assistance Program services with in-home energy education, including CARE information and an opportunity to apply for 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 able to extract from the Energy Savings Assistance Program data management system 9,375 customers who had indicated interest in CARE and were determined eligible for participation based on income documentation provided as part of qualifying for the Energy Savings Assistance Program. CARE new enrollments from Energy Savings Assistance Program totaled 2,176 in PY2011.

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

SDG&E's outreach team works with CARE capitation agencies and partners with many other Community and Faith-Based Organizations to promote the CARE program. When training and collateral is provided regarding the CARE program, Energy Savings Assistance Program and Medical Baseline Programs are also included in the training and follow up.

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

As part of SDG&E's leveraging agreement with the Department of Community Services and Development (DCSD), SDG&E continues to promote the DCSD's Low Income Home Energy Assistance Program (LIHEAP) bill payment assistance and weatherization services. SDG&E provides, on its applications and other program materials, DCSD's telephone number for customers to call for additional information. SDG&E CARE Processing staff also assists customers calling regarding the CARE discount with information on how to receive bill assistance through DCSD's HEAP program. In addition, SDG&E's agreement with 2-1-1 San Diego calls for part of the customer screening include referral to LIHEAP agencies (CUI and MAAC), as appropriate. In 2011, 2-1-1 San Diego handled over 33,000 utility-related calls and referred 18,900 of those to LIHEAP agencies.

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

In 2011, SDG&E continued to focus enrollment effort on more efficient enrollment channels available. SDG&E utilized targeted automated phone campaigns, email blast, television, radio, and direct mail effort to drive enrollment efforts to non-paper enrollment processes. The direct mails provided both the link to the CARE internet enrollment form and the CARE Interactive Voice Response (IVR) phone line to enroll in the program. Additionally, all applications and renewal forms provided internet and IVR as an option for enrollment. Additionally, SDG&E worked with third-party

organizations to provide them access to enroll customers in CARE using the internet applications. Agencies were able to enter their source code on the forms in order to receive payment for the eligible applications they entered. All of these effort helped increase amount of paperless applications received to a high of approximately 50% of all the applications received.

2.5 Processing Care Applications

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

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

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

In 2011, SDG&E contracted with a third-party vendor to provide door-to door enrollment services to non-participating customers. This effort resulted in 7,516 CARE enrollments. The outreach areas were defined by SDG&E and targeted hard-to-reach customer segments. The door-to-door efforts provide opportunity for enrollment to customers who may not respond to traditional outreach methods conducted by the SDG&E.

SDG&E also contracted with 2-1-1 San Diego to enroll customers on the CARE program, provide leads for Energy Savings Assistance Program and mail Medical

Baseline Allowance program applications after screening customers. 2-1-1 San Diego is a resource and information hub that connects people with community, health and disaster services through a free confidential phone service and searchable online database. 2-1-1 representatives are provided access to an SDG&E database that provides them with the CARE, Energy Savings Assistance and Medical Baseline Allowance program customer status. They cross check the system and offer CARE phone enrollment to those clients not participating in CARE. They then input the data into the SDG&E online form to complete the process. Through their referrals in 2011 2,386 customers were enrolled on CARE.

The Harris Group and Catholic Charities were contracted to launch a multicultural multilingual outreach with focus on African immigrants, African Americans, Vietnamese and Arabic speakers. The project ran from May through December 2011. Both contractors participated in a myriad of outreach activities to reach the targeted populations where they gather for worship, shop and recreate such as churches, food markets and ethnic festivals. Their combined efforts raised program awareness with thousands of people, who may otherwise have been unaware of SDG&E's customer assistance programs, due to language or cultural barriers. These efforts yielded 479 new CARE enrollments and 182 Energy Savings Assistance Program enrollments.

2.6 Program Management

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

There were no events that significantly affected CARE program management during 2011.

3. CARE Expansion Program

3.1 Participant Information

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

See Table 12a

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

FACILITY TYPE	ELECTRIC	GAS
Commercial	6,336	5,456
Residential	1,693	984

3.2 Usage Information

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

See CARE Table 12b

3.3 Program Costs

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

3.3.1.1 Discount Information

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

Gas - \$9.54

Electric - \$16.97

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

Gas - \$57.12

Electric - \$191.15

3.4. Outreach

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

SDG&E Market Advisors work with agencies daily to provide them with information regarding all programs and services offered by SDG&E. In mid-2011, SDG&E identified an opportunity to inform Project Managers in the field about the Expanded CARE program. In order to for a non-profit group living facility to meet the Expanded CARE program requirements, the Project Managers need to understand how to best configure the meters at a site in order for an agency to qualify for the discount. In August, CARE program management met with Project Managers to inform them of the program requirements in order to make better decisions for their clients.

3.4.2 Discuss each of the following:

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

SDG&E employees continue to be the most effective outreach source for providing program information. Through their regular interaction with non-profit

organizations, SDG&E Market Advisors are able to identify opportunities to provide organizations with the information regarding program participation.

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

SDG&E does not have any participating Expanded CARE facilities in its shared service territory with SoCalGas.

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

SDG&E did not perform a submetered renewal process this year and will conduct the process in 2012. However, the key issue continues to be turn-over within the organizations. In 2011, SDG&E received several calls from organizations which had been removed for non-response to the renewal the prior year. They identified personnel changes as the reason they had not responded in the prior year.

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

SDG&E continues to work through challenges with finding efficiencies in a labor intensive process. However, SDG&E continues to look for opportunities to improve the enrollment system in order to minimize effort that is required to complete the enrollment and renewal process for these organizations.

3.5 Program Management

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

In the 2009-2011 CARE Program applications, SDG&E requested to change the recertification period for Expanded CARE facilities from a one-year process to a two-year process, in line with the individual residential accounts. SDG&E did not conduct a renewal during the 2011 CARE program year, therefore, application information was minimal.

4. Fund Shifting

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

In 2011, SDG&E requested fund shifting to the following categories within the rules laid out in Section 20.1 of D. 08-11-031 and D.10-10-008:²⁰

- **Gas Appliance:** SDG&E had installed more gas measures than anticipated in its 2009-2011 Application²¹ and required more funding to continue offering gas measures to qualified customers during 2011. The additional funding was requested due to a significant increase in the installation of water heater replacements and furnace repair and replacements in program year 2011 than originally anticipated. SDG&E received Commission authorization to shift \$2.222 million from its 2010 year's unspent electric department funds to the gas department to be used to provide gas appliances to qualified ESA Program customers.
- **Weatherization:** SDG&E funding was requested to continue the installation of weatherization measures such as weatherstripping, caulking, and outlet gaskets.

²⁰ See Motion of San Diego Gas & Electric Company (U 902M) for To Shift Energy Savings Assistance Program Funds, dated October 24, 2011 and Administrative Law Judge's Ruling Granting, in Part, San Diego Gas & Electric Company's Motion to Shift Funds, dated November 21, 2011..

²¹ A. 05-08-024.

For the 2009-2011 Energy Savings Assistance Program cycle, SDG&E program design did not anticipate installation of the aforementioned weatherization measures. SDG&E proposed to install measures which provided the greatest benefit to low income customers, specifically by achieving energy savings and reducing low income customer's energy bills, which would have eliminated the continued offering of weatherstripping, caulking, and outlet gaskets and did not include funding for these measures in its Application. SDG&E received authorization to shift \$3.519 million from its 2010 unspent electric department funds to the gas department to be used to provide weatherization to qualified ESA Program customers.

- **Gas Outreach and Assessment:** SDG&E requested funding to enroll 22,000 customers in the program which exceeded SDG&E's original enrollment goal. The funding was also used to offset the unanticipated costs for enrollments which increased in program year 2011. SDG&E received authorization to shift \$482,500 from its 2010 unspent electric department funds to its 2011 gas department for outreach and assessment.
- **PCT Pilot to the IHD Pilot:** SDG&E requested additional funds for the IHD Pilot because the original costs projected were not sufficient and costs were higher for materials and contractor labor, and unexpected costs such as customer service support, licensing, and marketing awareness campaigns to gain customer participation in the pilot.²² In order to effectively run the IHD Pilot, the integration with smart meter technology and development of the customer experience software platform²³ was necessary to ensure a positive customer outcome. The higher costs were not foreseen in developing the original funding requested in 2008. SDG&E received Commission authorization to shift \$60,000

²² See Additional Support for SDG&E's Request to Shift Funds to the In-Home Display Pilot dated December 1, 2011 and Administrative Law Judge's Ruling Granting San Diego Gas & Electric Company Authority To Shift Unspent Funds From Programmable Communicating Thermostat Pilot To The In-Home Display Pilot, dated December 30, 2011.

²³ The platform supports the customer portal and the micro site which was developed for enrollment.

of 2011 electric funds from the Programmable Communicating Thermostat (PCT) Pilot to the In-Home Display (IHD) Pilot and \$40,000 from the prior year's unspent electric department funds to the IHD Pilot.

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

(See CARE Table 13)

SDG&E shifted \$116,226 from the IT/Program cost category to the Outreach (\$83,513), Processing, Certification, and Verification (\$23,689) and Measurement & Evaluation (\$9,024) cost categories in 2011.²⁴

4.1.3 Was there any Energy Savings Assistance Program or CARE fund shifting activity that occurred that falls OUTSIDE the rules laid out in Section 20.1 of D. 08-11-031?

No Fund Shifting occurred outside of the rules laid out in Section 20.1 of D. 08-11-031 and D.10-10-008.

²⁴ See D. 08-11-031, Ordering Paragraph 85.

5. Commonly Used Acronyms

CARE	California Alternate Rates for Energy
CBO	Community-Based Organization
CFL	Compact Fluorescent Lamp
CPUC	California Public Utilities Commission
CSI	California Solar Initiative
D.	Decision
DCSD	California Department of Community Services & Development
DDTP	Deaf and Disabled Telecommunications Program
DRP	Demand Response Program
DSM	Demand Side Management
EE	Energy Efficiency
ESA	Energy Savings Assistance
FERA	Family Electric Rate Assistance
HEAT	Home Energy Assistance Tracking
IHD	In Home Display
IOU	Investor-Owned Utility
kW	Kilowatt
kWh	Kilowatt Hour
LIEE	Low Income Energy Efficiency
LIHEAP	Low Income Home Energy Assistance Program
MOU	Memorandum of Understanding
mW	Megawatt
mWh	Megawatt Hour
NGAT	Natural Gas Appliance Testing
OP	Ordering Paragraph
PCT	Programmable Communicating Thermostat
PEV	Post Enrollment Verification
PFM	Petition for Modification
PG&E	Pacific Gas & Electric Company
PPP	Public Purpose Program
PY	Program Year
SCE	Southern California Edison
SDG&E	San Diego Gas & Electric Company
SoCalGas	Southern California Gas Company
TDD	Telecommunications Device for the Deaf
TRC	Total Resource Cost Test
UC	Utility Costs
SSI	Supplemental Security Income
SSD	Supplemental Security Disability
SSP	Social Security Pension

6. Appendix:

6.1 Energy Savings Assistance Program Tables

Energy Savings Assistance Program- Table 1- Energy Savings Assistance Program Overall Program Expenses

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

Energy Savings Assistance Program- Table 3- Energy Savings Assistance Program Cost Effectiveness

Energy Savings Assistance Program- Table 4- Energy Savings Assistance Program Penetration

Energy Savings Assistance Program- Table 5- Energy Savings Assistance Program Direct Purchases & Installation Contractors

Energy Savings Assistance Program- Table 6- Energy Savings Assistance Program Installation Cost of Program Installation Contractors

Energy Savings Assistance Program- Table 7- Expenditures by Cost Elements

Energy Savings Assistance Program- Table 8- Detail by Housing Type and Source

Energy Savings Assistance Program- Table 9- Life Cycle Bill Savings by Measure

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

Energy Savings Assistance Program- Table 11- Bill Savings Calculations by Program Year

Energy Savings Assistance Program- Table 12- Whole Neighborhood Approach

Energy Savings Assistance Program- Table 13- Categorical Enrollment

Energy Savings Assistance Program- Table 14- Leveraging

Energy Savings Assistance Program- Table 15- Integration

Energy Savings Assistance Program- Table 16- Lighting

Energy Savings Assistance Program- Table 17- Studies & Pilots

Energy Savings Assistance Program- Table 18- “Add Back” Measures

Energy Savings Assistance Program- Table 19- Energy Savings Assistance Program Fund Shifting

6.2 CARE Tables

CARE- Table 1- CARE Overall Program Expenses

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

CARE- Table 3- CARE Verification

CARE- Table 4- Self Certification and Re-Certification

CARE- Table 5- Enrollment by County

CARE- Table 6- Recertification Results

CARE- Table 7- Capitation Contractors

CARE- Table 8- Participants per Month Fund Shifting

CARE- Table 9- Average Monthly Usage & Bill

CARE- Table 10- CARE Surcharge & Revenue

CARE- Table 11- CARE Capitation Applications

CARE- Table 12- CARE Expansion Program

CARE- Table 13- CARE Fund Shifting

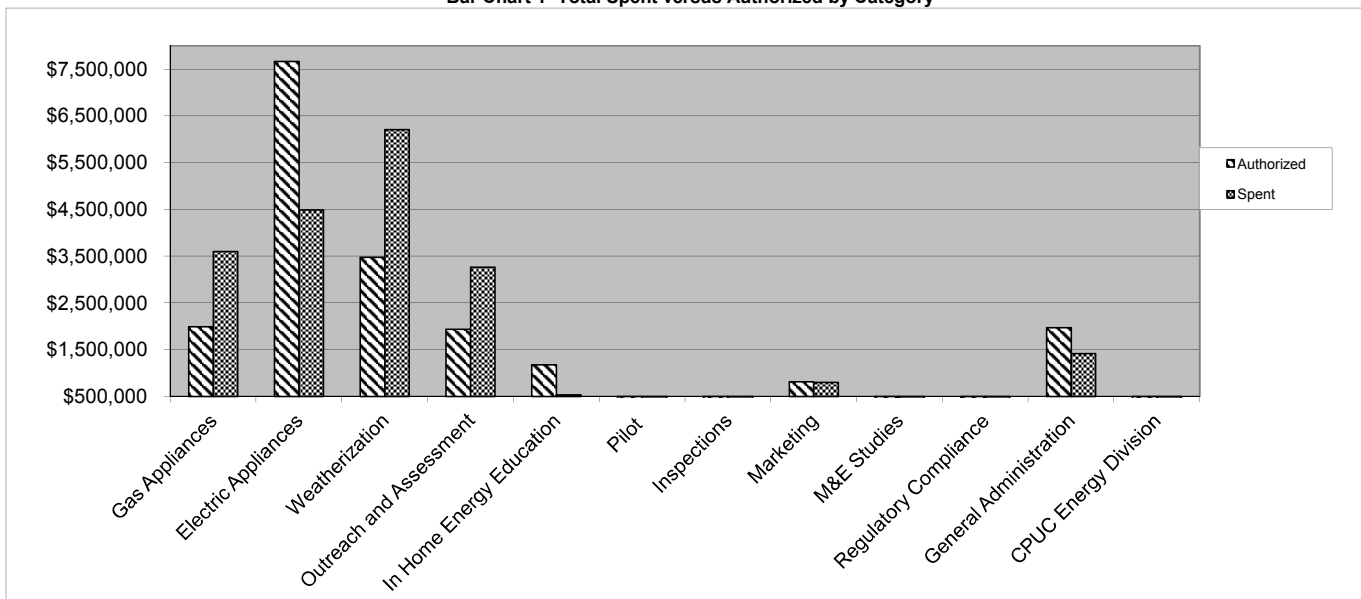
PY2011 Energy Savings Assistance Program Annual Report
Energy Savings Assistance Program Table 1
Energy Savings Assistance Program Overall Program Expenses
San Diego Gas & Electric Company

Energy Savings Assistance Program:	2011 Authorized Budget ¹			2011 Annual Expenses			% of 2011 Budget Spent		
	Electric	Gas	Elec & Gas-Authorized	Electric	Gas	Elec & Gas-Spent	Electric	Gas	Elec & Gas
Energy Efficiency									
- Gas Appliances	\$ -	\$ 1,989,532	\$ 1,989,532	\$ -	\$ 3,600,798	\$ 3,600,798	0%	181%	181%
- Electric Appliances	\$ 7,668,938		\$ 7,668,938	\$ 4,492,261	\$ -	\$ 4,492,261	59%	0%	59%
- Weatherization ²	\$ -	\$ 3,476,824	\$ 3,476,824	\$ -	\$ 6,208,543	\$ 6,208,543	0%	179%	179%
- Outreach and Assessment	\$ 968,240	\$ 968,240	\$ 1,936,480	\$ 1,633,326	\$ 1,633,326	\$ 3,266,653	169%	169%	169%
- In Home Energy Education	\$ 587,161	\$ 587,161	\$ 1,174,322	\$ 267,406	\$ 267,406	\$ 534,812	46%	46%	46%
- Education Workshops	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
- Pilot	\$ 120,910	\$ 120,910	\$ 241,820	\$ 138,944	\$ 138,944	\$ 277,888	115%	115%	115%
Energy Efficiency TOTAL	\$ 9,345,249	\$ 7,142,668	\$ 16,487,917	\$ 6,531,937	\$ 11,849,017	\$ 18,380,954	70%	166%	111%
Training Center									
Training Center	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Inspections									
Inspections	\$ 31,347	\$ 31,347	\$ 62,694	\$ 32,963	\$ 32,963	\$ 65,926	105%	105%	105%
Marketing									
Marketing	\$ 407,171	\$ 407,171	\$ 814,341	\$ 400,030	\$ 400,030	\$ 800,060	98%	98%	98%
M&E Studies									
M&E Studies	\$ (22,932)	\$ (22,932)	\$ (45,864)	\$ 39,083	\$ 39,083	\$ 78,166	-170%	-170%	-170%
Regulatory Compliance									
Regulatory Compliance	\$ 143,003	\$ 143,003	\$ 286,006	\$ 97,718	\$ 97,717	\$ 195,435	68%	68%	68%
General Administration									
General Administration	\$ 984,552	\$ 984,552	\$ 1,969,104	\$ 708,209	\$ 708,207	\$ 1,416,416	72%	72%	72%
CPUC Energy Division									
CPUC Energy Division	\$ 22,474	\$ 22,474	\$ 44,947	\$ 6,776	\$ 6,776	\$ 13,551	30%	30%	30%
TOTAL PROGRAM COSTS									
TOTAL PROGRAM COSTS	\$ 10,910,863	\$ 8,708,282	\$ 19,619,145	\$ 7,816,717	\$ 13,133,792	\$ 20,950,509	72%	151%	107%
Funded Outside of LIEE Program Budget									
Indirect Costs									
Indirect Costs				\$ 443,967	\$ 472,716	\$ 916,684			
NGAT Costs									
NGAT Costs				\$ -	\$ 316,374	\$ 316,374			

¹ The funding levels in the Authorized budget columns do not reflect the unspent funds at year-end 2010 which were carried over and used to fund 2011 program activity as authorized by Commission D.08-11-031 and as modified by D.10-10-008. For a full accounting of the authorized fund shifting, see ESA Program Table 19.

² 2011 Authorized Budget \$20,327,606, less carry back into PY2010 in the amount of \$708,461 from 2011 Weatherization Authorized Budget Category to cover 2010 gas expenditures. (2011 Weatherization Authorized = \$4,185,285 less carry back into 2010 of \$708,461 = \$3,476,824 for 2011 Weatherization Budget).

Bar Chart 1- Total Spent versus Authorized by Category



PY 2011 Energy Savings Assistance Program Annual Report
Energy Savings Assistance Program Table 2
Energy Savings Assistance Program Expenses and Energy Savings by Measures Installed
San Diego Gas & Electric Company

Measures	Units	PY Completed & Expensed Installations					Expenses	% of Expenditure
		Quantity Installed	kWh (Annual)	kW (Annual)	Therms (Annual)			
Heating Systems								
Furnaces	Each	4,296	-	-	7,845		1,747,196	10%
Cooling Measures								
A/C Replacement - Room	Each	255	12,478	16.97	-		253,707	1%
A/C Replacement - Central	Each	58	17,222	-	-		228,045	1%
A/C Tune-up - Central	Each	54	12,303	-	-		6,625	0%
A/C Services - Central	Each							
Heat Pump	Each							
Evaporative Coolers	Each							
Evaporative Cooler Maintenance	Each							
Infiltration & Space Conditioning								
Envelope and Air Sealing Measures	Home	16,726	188,149	-	48,006		3,701,438	20%
Duct Test and Sealing	Home	832	49,686	-	16,279		138,158	1%
Attic Insulation	Home	661	3,220	0.60	22,900		675,921	4%
Water Heating Measures								
Water Heater Conservation Measures	Home	17,540	296,612	65.28	177,523		1,335,079	7%
Water Heater Replacement - Gas	Each	165	-	-	1,997		150,004	1%
Water Heater Replacement - Electric	Each							
Tankless Water Heater - Gas	Each							
Tankless Water Heater - Electric	Each							
Lighting Measures								
CFLs	Each	106,098	1,697,568	212.20	-		723,310	4%
Interior Hard wired CFL fixtures	Each	13,000	829,400	-	-		936,382	5%
Exterior Hard wired CFL fixtures ¹	Each	3,678	3,678	-	-		193,278	1%
Torchiere	Each	6,324	1,207,884	-	-		886,391	5%
Refrigerators								
Refrigerators -Primary	Each	1,737	1,312,771	222.81	-		1,095,472	6%
Refrigerators - Secondary	Each							
Pool Pumps								
Pool Pumps	Each							
New Measures								
Forced Air Unit Standing Pilot Change Out	Each	352	-	-	14,784		102,925	1%
Furnace Clean and Tune	Each	7,463	-	-	13,767		509,756	3%
High Efficiency Clothes Washer	Each	1,550	42,372	-	54,353		971,604	5%
Microwave	Each	1,455	1,017,569	-	-		130,950	1%
Thermostatic Shower Valve	Each	3,883	97,755	-	49,477		341,298	2%
LED Night Lights	Each	54,877	560,843	-	-		172,782	1%
Occupancy Sensor	Each							
Pilots								
A/C Tune-up Central	Home							
Interior Hard wired CFL fixtures	Each							
Ceiling Fans	Each							
In-Home Display	Each						116,078	1%
Programmable Controllable Thermostat	Each						141,044	1%
Forced Air Unit	Each							
Microwave								
High Efficiency Clothes Washer								
Workforce, Education, and Training (WET) Pilot							20,767	0%
Customer Enrollment								
Outreach & Assessment	Home	22,575					3,266,513	18%
In-Home Education	Home	22,252					465,450	3%
Education Workshops	Participant							
Total Savings and Expenditures²			7,345,831	518	406,931		18,310,172	100%
Homes Weatherized	Home	17,879						
Homes Treated								
- Single Family Homes Treated	Home	9,517						
- Multi-family Homes Treated	Home	11,460						
- Mobile Homes Treated	Home	1,598						
- Total Number of Homes Treated	Home	22,575						
# Eligible Homes to be Treated for PY ³	Home	20,384						
% OF Homes Treated	%	111%						
- Total Master-Metered Homes Treated	Home	419						

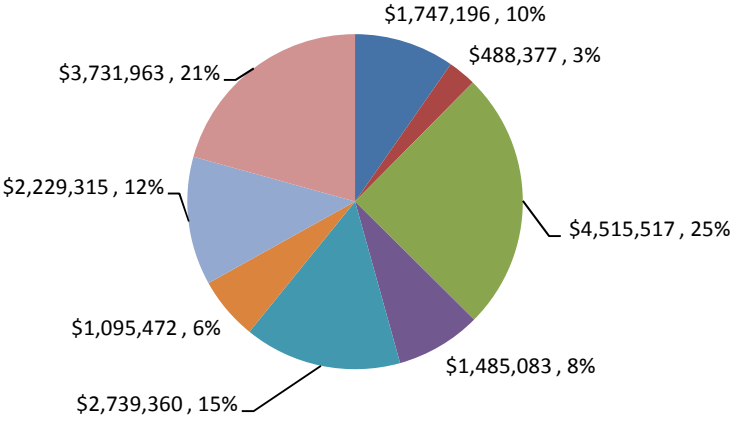
¹ Savings for external CFL fixtures are included with savings reported for CFLs.

² There is an addition of \$70,782 in expenditures for Energy Education Guide and CFL bulbs purchased and installed in customer home.

³ Based on Attachment H of D.08-11-031.

PIE CHART 1- Expenses by Measures Category For December 2011

**ESAP Table 2
San Diego Gas & Electric
YTD ESAP Expenses**



■ Heating Systems ■ Cooling Measures ■ Infiltration & Space Conditioning ■ Water Heating Measures ■ Lighting Measures ■ Refrigerators ■ New Measures ■ Customer Enrollment

**PY 2011 Energy Savings Assistance Program Annual Report
 Energy Savings Assistance Program Table 3
 Energy Savings Assistance Program COST-EFFECTIVENESS
 San Diego Gas & Electric Company**

PY - Recorded ¹						
Ratio of Benefits Over Costs				Net Benefits; \$ Millions		
Program Year	Utility Cost Test	Total Resource Cost Test	Modified Participant Test	Utility Cost Test	Total Resource Cost Test	Modified Participant Test
2011	0.45	0.33	0.90	(11,090,027)	(13,403,509)	(2,139,522)
2010	0.50	0.38	0.95	(9,449,217)	(11,642,291)	(1,079,270)
2009	0.54	0.42	0.83	(7,204,451)	(9,201,740)	(2,809,076)
2008	0.64	0.52	0.77	(6,120,166)	(8,121,185)	(4,070,011)
2007	0.41	0.32	0.62	(7,781,493)	(8,954,377)	(4,866,416)
2006	0.33	0.54	0.61	(9,883,548)	(6,602,546)	(5,837,643)
2005	0.45	0.7	0.99	(7,115,009)	(3,896,685)	(66,902)
2004	0.47	0.73	1.07	(7,584,889)	(3,905,982)	938,847

¹Source of Data:

The Modified Participant Test (MPT) and the Utility Cost Test (UCT) include non-energy benefits (NEBs) along with energy savings in the numerator. The MPT was calculated using the Low Income Public Purpose Test (LIPPT) workbook as modified for the PY2003 LIEE measure cost effectiveness testing (the NEBs model). The UCT was calculated in two stages: first, the NEBs for this ratio were calculated using the NEBs model; second, the avoided cost benefits were calculated using the E3 model for energy efficiency cost effectiveness testing. The Total Resource Test (TRC) was calculated using the E3 calculator. The TRC does not include NEBs.

PY 2011 Energy Savings Assistance Program Annual Report
Energy Savings Assistance Program Table 4
Energy Savings Assistance Program PENETRATION
San Diego Gas & Electric Company

Customer	Housing Type	# Homes Treated	Current Year Penetration Rate for Homes Treated
Gas and Electric Customers			
Owners - Total		5,555	
	Single Family	3,817	
	Multi Family	310	
	Mobile Homes	1,428	
Renters - Total		15,520	
	Single Family	4,883	
	Multi Family	10,537	
	Mobile Homes	100	
Electric Customers (only)			
Owners - Total		541	
	Single Family	441	
	Multi Family	37	
	Mobile Homes	63	
Renters - Total		959	
	Single Family	376	
	Multi Family	576	
	Mobile Homes	7	
Gas Customers (only)			
Owners - Total		-	
	Single Family	-	
	Multi Family	-	
	Mobile Homes	-	
Renters - Total		-	
	Single Family	-	
	Multi Family	-	
	Mobile Homes	-	
Total Homes Treated in PY		22,575	
Total Homes Eligible in PY¹		20,384	111%

¹ Based on Attachment H of D.08-11-031.

Penetration History				
Year ²	Homes Treated	Ineligible & Unwilling ³	Estimated Eligible in Current Year	Current Year Penetration Rate for Homes Treated
2002	14,089	-		
2003	15,706	-		
2004	14,897	-		
2005	11,254	-		
2006	13,771	-		
2007	13,074	-		
2008	20,804	-		
2009	20,927	6,855		
2010	21,593	8,690		
2011	22,575	8,423	20,384	111%
2012				
2013				
2014				
2015				
2016				
2017				
2018				
2019				
2020				
Total Homes Treated since 2002	168,690	23,968		

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

³ Includes refused, over income and customers unable to provide income documentation. SDG&E began tracking ineligible and unwilling in 2009.

Year	Utility in Shared Service Territory	Eligible Households in Shared Service Territory	Eligible households treated by both utilities in shared service territory
2011	Southern California Gas Company	17,115	298

PY2011 Energy Savings Assistance Program Annual Report
Energy Savings Assistance Program Table 5
Energy Savings Assistance Program Direct Purchases & Installation Contractors
San Diego Gas & Electric Company

Contractor	County ¹	Contractor Type (Check one or more if applicable)				PY Annual Expenditures ²
		Private	CBO	WMDVBE	LIHEAP	
RANCHO ENERGY SERVICES	San Diego			X		\$ 2,248,165
CAL-WEST AIR CONDITIONING INC	San Diego	X				\$ 159,582
CAMPESINOS UNIDOS INC	San Diego		X	X	X	\$ 614,075
MAAC Project	San Diego		X	X	X	\$ 962,418
CAPITAL STATE CONTRUCTION	San Diego	X				\$ 1,637,371
JERRY'S HEATING & AIR CONDITIONING, INC	San Diego	X				\$ 859,074
AMERIMEX	San Diego			X		\$ 218,296
RICHARD HEATH & ASSOCIATES INC	San Diego, Orange			X		\$ 5,417,226
THA HEATING AND AIR CONDITIONING, INC	San Diego	X				\$ 532,959
AMERICAN INSULATION INC	San Diego			X		\$ 2,135,621
EAGLE SYSTEMS INTERNATIONAL INC	San Diego	X				\$ 652,167
JJ HEAT & AIR	San Diego	X				\$ 250,651
RELIABLE ENERGY MANAGEMENT INC	San Diego			X		\$ 110,736
TOWN & COUNTRY PROPERTY INSPECTIONS LLC	San Diego			X		\$ 164,797
R&B WHOLESALE DISTRIBUTOR INC	San Diego	X				\$ 2,069,148
Total Contractor Expenditures						\$ 18,032,285

¹ List counties where contractor provides service - a legend may be used to fit the information in the cell

²Expenditures in this category also includes the costs paid to the Outreach contractor for customers that were identified as unwilling or ineligible for the ESA Program.

PY2011 Energy Savings Assistance Program Annual Report
 Energy Savings Assistance Program Table 6
 Energy Savings Assistance Program Installation Cost of Program Installation Contractors
 San Diego Gas & Electric Company

	Unit of Measure	CBO/WMDVBE						Non-CBO/WMDVBE						2011 Program Total				
		Installations		Dwellings		Costs		Installations		Dwellings		Costs		Units Installed	Household	Costs	Cost/ Unit	Cost/ Household
		Units	%	Units	%	\$	%	Units	%	Units	%	\$	%					
Dwellings	Each	1,004,816	100%	21,024	100%	\$ 11,871,334	100%	251,714	100%	1,551	100%	6,160,951	100%	1,256,530	22,575	18,032,285	\$ 14.35	\$ 798.77
Heating Systems																		
Furnaces	Each	5,807	1%	3,867	18%	412,852	3%	8,250	3%	4,296	277%	1,334,344	22%	14,057	8,163	1,747,196	124	214
Cooling Measures																		
A/C Replacement - Room	Each	263	0%	254	1%	253,468	2%	1	0%	1	0%	239	0%	264	255	253,707	\$ 961.01	\$ 994.93
A/C Replacement - Central	Each	-	0%	-	0%	-	0%	58	0%	58	4%	228,045	4%	58	58	228,045	\$ 3,931.81	\$ 3,931.81
A/C Tune-up - Central	Each	3	0%	4	0%	375	0%	50	0%	50	3%	6,250	0%	53	54	6,625	\$ 125.00	\$ 122.69
A/C Services - Central	Each	-	0%	-	0%	-	0%	-	0%	-	0%	-	0%	-	-	-	\$ -	\$ -
Heat Pump	Each	-	0%	-	0%	-	0%	-	0%	-	0%	-	0%	-	-	-	\$ -	\$ -
Evaporative Coolers	Each	-	0%	-	0%	-	0%	-	0%	-	0%	-	0%	-	-	-	\$ -	\$ -
Evaporative Cooler Maintenance	Each	-	0%	-	0%	-	0%	-	0%	-	0%	-	0%	-	-	-	\$ -	\$ -
Infiltration & Space Conditioning																		
Envelope and Air Sealing Measures	Home	123,141	12%	12,185	58%	2,801,359	24%	37,096	15%	4,541	293%	903,832	15%	160,237	16,726	3,705,191	\$ 23.12	\$ 221.52
Duct Test and Sealing	Home	763	0%	764	4%	67,513	1%	193	0%	68	4%	70,645	1%	956	832	138,158	\$ 144.52	\$ 166.06
Attic Insulation	Home	581,402	58%	520	2%	539,128	5%	158,624	63%	141	9%	151,997	2%	740,026	661	691,125	\$ 0.93	\$ 1,045.58
Water Heating Measures																		
Water Heater Conservation Measures	Home	47,106	5%	12,929	61%	979,815	8%	16,429	7%	4,611	297%	338,236	5%	63,535	17,540	1,318,051	\$ 20.75	\$ 75.15
Water Heater Replacement - Gas	Each	32	0%	32	0%	28,781	0%	133	0%	133	9%	121,223	2%	165	165	150,004	\$ 909.12	\$ 909.12
Water Heater Replacement - Electric	Each	-	0%	-	0%	-	0%	-	0%	-	0%	-	0%	-	-	-	\$ -	\$ -
Tankless Water Heater - Gas	Each	-	0%	-	0%	-	0%	-	0%	-	0%	-	0%	-	-	-	\$ -	\$ -
Tankless Water Heater - Electric	Each	-	0%	-	0%	-	0%	-	0%	-	0%	-	0%	-	-	-	\$ -	\$ -
Lighting Measures																		
CFLs	Each	95,368	9%	15,752	75%	649,583	5%	10,730	4%	1,494	96%	73,727	1%	106,098	17,246	723,310	\$ 6.82	\$ 41.94
Interior Hard wired CFL fixtures	Each	9,372	1%	3,867	18%	688,091	6%	3,628	1%	1,437	93%	261,411	4%	13,000	5,304	949,502	\$ 73.04	\$ 179.02
Exterior Hard wired CFL fixtures	Each	2,884	0%	1,840	9%	155,716	1%	794	0%	525	34%	41,869	1%	3,678	2,365	197,585	\$ 53.72	\$ 83.55
Torchiere	Each	7,580	1%	5,163	25%	715,276	6%	1,637	1%	1,161	75%	150,051	2%	9,217	6,324	865,177	\$ 93.93	\$ 136.90
Refrigerators																		
Refrigerators -Primary	Each	-	0%	-	0%	-	0%	1,763	1%	1,737	112%	1,095,472	18%	1,763	1,737	1,095,472	\$ 621.37	\$ 630.67
Refrigerators -Secondary	Each	-	0%	-	0%	-	0%	-	0%	-	0%	-	0%	-	-	-	\$ -	\$ -
Pool Pumps																		
Pool Pumps	Each	-	0%	-	0%	-	0%	-	0%	-	0%	-	0%	-	-	-	\$ -	\$ -
New Measures																		
Forced Air Unit Standing Pilot Change	Each	263	0%	263	1%	74,697	1%	89	0%	89	6%	28,228	0%	352	352	102,925	\$ 292.40	\$ 292.40
Furnace Clean and Tune	Each	6,607	1%	6,378	30%	449,276	4%	1,080	0%	1,085	70%	60,480	1%	7,687	7,463	509,756	\$ 66.31	\$ 68.30
High Efficiency Clothes Washer	Each	(1)	0%	1	0%	(627)	0%	1,550	1%	1,549	100%	972,231	16%	1,549	1,550	971,604	\$ 627.25	\$ 626.84
Microwave	Each	1,161	0%	1,163	6%	104,490	1%	294	0%	294	19%	26,460	0%	1,455	1,457	130,950	\$ 90.00	\$ 89.88
Thermostatic Shower Valve	Each	3,995	0%	2,645	13%	233,399	2%	1,899	1%	1,238	80%	109,157	2%	5,894	3,883	342,556	\$ 58.12	\$ 88.22
LED Night Lights	Each	52,273	5%	19,709	94%	164,592	1%	2,604	1%	1,507	97%	8,190	0%	54,877	21,216	172,782	\$ 3.15	\$ 8.14
Occupancy Sensor	Each	-	0%	-	0%	-	0%	-	0%	-	0%	-	0%	-	-	-	\$ -	\$ -
Pilots																		
A/C Tune-up Central	Home																	
Interior Hard wired CFL fixtures	Each																	
Ceiling Fans	Each																	
In-Home Display	Each																	
Programmable Controllable Thermostat	Each																	
Forced Air Unit	Each																	
Microwave	Each																	
High Efficiency Clothes Washer	Each																	
Customer Enrollment																		
Outreach & Assessment	Home	46,092	5%	21,024	100%	3,118,509	26%	3,269	1%	1,551	100%	148,004	2%	49,361	22,575	3,266,513	\$ 66.18	\$ 144.70
In-Home Education	Home	20,705	2%	20,714	99%	434,590	4%	1,543	1%	1,538	99%	30,860	1%	22,248	22,252	465,450	\$ 20.92	\$ 20.92
Education Workshops	Participant	-	0%	-	0%	-	0%	-	0%	-	0%	-	0%	-	-	-	\$ -	\$ -

PY 2011 Energy Savings Assistance Program Annual Report
Energy Savings Assistance Program Table 7
Expenditures by Cost Elements
San Diego Gas & Electric Company

Energy Savings Assistance Program:	2011 Expenditures Recorded by Cost Element			
	Labor ¹	Non-Labor ²	Contract ³	Total
Energy Efficiency				
- Gas Appliances	\$ -	\$ -	\$ 3,600,798	\$ 3,600,798
- Electric Appliances	\$ -	\$ 1,317	\$ 4,490,943	\$ 4,492,261
- Weatherization	\$ -	\$ 102	\$ 6,208,441	\$ 6,208,543
- Outreach and Assessment	\$ -	\$ -	\$ 3,266,653	\$ 3,266,653
- In Home Energy Education	\$ -	\$ 69,362	\$ 465,450	\$ 534,812
- Education Workshops	\$ -	\$ -	\$ -	\$ -
- Pilot	\$ -	\$ 277,888	\$ -	\$ 277,888
Energy Efficiency TOTAL	\$ -	\$ 348,670	\$ 18,032,285	\$ 18,380,954
Training Center	\$ -	\$ -	\$ -	\$ -
Inspections	\$ 64,615	\$ 1,311	\$ -	\$ 65,926
Marketing	\$ -	\$ 800,060	\$ -	\$ 800,060
M&E Studies	\$ -	\$ 78,166	\$ -	\$ 78,166
Regulatory Compliance	\$ 171,113	\$ 24,322	\$ -	\$ 195,435
General Administration	\$ 1,130,667	\$ 285,750	\$ -	\$ 1,416,416
CPUC Energy Division	\$ -	\$ 13,551	\$ -	\$ 13,551
TOTAL PROGRAM COSTS	\$ 1,366,395	\$ 1,551,830	\$ 18,032,285	\$ 20,950,509

¹Define Labor

²Define Non-Labor

³Define Contractor

Utility staff labor including labor indirects (vacation and sick leave, payroll taxes, and affiliate labor indirects)

All other non-labor costs excluding contractor costs defined below.

Expenses associated with contractor installations, Weatherization, Outreach and Assessment, and In Home Energy Education services.

PY2011 Energy Savings Assistance Program Annual Report
Energy Savings Assistance Program Table 8
Detail by Housing Type and Source
San Diego Gas & Electric Company

Customer	Housing Type	2011 Energy Savings			2011 Expenses ¹	2011 Households Treated	2011 Households Eligible
		(mWh)	MW	(mTherm [*])			
Gas and Electric Customers							
Owners - Total		2,033.56	0.174	192.371	7,559,943	5,555	
	Single Family	1,522.46	0.126	155.603	5,783,428	3,817	
	Multi Family	90.91	0.007	3.206	190,172	310	
	Mobile Homes	420.19	0.041	33.561	1,586,342	1,428	
Renters - Total		4,491.77	0.267	214.464	9,584,475	15,520	
	Single Family	1,693.06	0.127	138.862	4,441,292	4,883	
	Multi Family	2,769	0.137	73.653	5,091,501	10,537	
	Mobile Homes	29.68	0.003	1.949	51,682	100	
Electric Customers (only)							
Owners - Total		292.27	0.026	0.052	342,128	541	
	Single Family	253.60	0.023	0.031	296,722	441	
	Multi Family	16.27	0.001	0.021	23,013	37	
	Mobile Homes	22.40	0.001	0.000	22,393	63	
Renters - Total		528.23	0.050	0.045	545,702	959	
	Single Family	280.19	0.027	0.017	267,695	376	
	Multi Family	244.54	0.023	0.028	274,380	576	
	Mobile Homes	3.50	0.000	0.000	3,628	7	
Gas Customers (only)							
Owners - Total		-	-	-	-	-	
	Single Family	-	-	-	-	-	
	Multi Family	-	-	-	-	-	
	Mobile Homes	-	-	-	-	-	
Renters - Total		-	-	-	-	-	
	Single Family	-	-	-	-	-	
	Multi Family	-	-	-	-	-	
	Mobile Homes	-	-	-	-	-	
Total Homes Treated in PY							22,575
Total Homes Eligible in PY²							20,384

* Thousands of Therms

¹ Excluding indirect program costs

² Based on Attachment H of D.08-11-031.

PY 2011 Energy Savings Assistance Program Annual Report
Energy Savings Assistance Program Table 9
Life Cycle Bill Savings by Measure
San Diego Gas & Electric Company

Measure Description	PY Number Installed	Per Measure Electric Impact - Average (kWh)	Per Measure Gas Impact (Therms)	Effective Useful Life (EUL)	2011 Total Measure Life Cycle Bill Savings
Heating Systems					
Furnaces	4,296	-	2	13	59,058
Cooling Measures					
A/C Replacement - Room	255	49	-	15	16,319
A/C Replacement - Central	58	297	-	0	25,365
A/C Tune-up - Central	54	228	-	10	11,970
A/C Services - Central				0	
Heat Pump				0	
Evaporative Coolers				0	
Evaporative Cooler Maintenance				0	
Infiltration & Space Conditioning					
Envelope and Air Sealing Measures	16,726	11	3	5	329,600
Duct Sealing	832	60	20	25	290,825
Attic Insulation	661	5	35	25	356,868
Water Heating Measures					
Water Heater Conservation Measures	17,540	17	10	8	1,494,479
Water Heater Replacement - Gas	165	-	12	13	20,480
Water Heater Replacement - Electric				0	
Tankless Water Heater - Gas				0	
Tankless Water Heater - Electric				0	
Lighting Measures					
CFLs	106,098	16	-	9	1,520,317
Interior Hard wired CFL fixtures	13,000	64	-	16	1,132,595
Exterior Hard wired CFL fixtures*	3,678			0	
Torchiere	6,324	191	-	9	1,081,763
Refrigerators					
Refrigerators -Primary	1,737	756	-	15	1,716,890
Refrigerators - Secondary				0	
Pool Pumps					
Pool Pumps				0	
New Measures					
Forced Air Unit Standing Pilot Change	352	-	42	18	188,718
Furnace Clean and Tune	7,463	-	2	13	141,220
High Efficiency Clothes Washer	1,550	27	35	14	640,366
Microwave	1,455	698	-	15	1,330,814
Thermostatic Shower Valve	3,883	25	13	10	512,305
LED Night Lights	54,877	10		9	502,283
Occupancy Sensor			-		
Pilots					
A/C Tune-up Central					
Interior Hard wired CFL fixtures					
Ceiling Fans					
In-Home Display					
Programmable Controllable					
Forced Air Unit					
Microwave					
High Efficiency Clothes Washer					
Total Homes Served By the Program					22,575
Life Cycle Bill Savings Per Home					504

* Savings for external CFL fixtures are included with savings reported for CFLs

PY2011 Energy Savings Assistance Program Annual Report
Energy Savings Assistance Program Table 10
Energy Rate Used for Bill Savings Calculations
San Diego Gas & Electric Company

Year	\$/kWh [1]	\$/Therm
2011	0.12	1.04
2012	0.12	1.07
2013	0.13	1.10
2014	0.13	1.14
2015	0.14	1.17
2016	0.14	1.21
2017	0.14	1.24
2018	0.15	1.28
2019	0.15	1.32
2020	0.16	1.36
2021	0.16	1.40
2022	0.17	1.44
2023	0.17	1.48
2024	0.18	1.53
2025	0.18	1.57
2026	0.19	1.62
2027	0.19	1.67
2028	0.20	1.72
2029	0.20	1.77
2030	0.21	1.82
2031	0.22	1.88
2032	0.22	1.93
2033	0.23	1.99

^[1] For 2011 average cost per kWh paid by participants. Cost is escalated 3% annually in 24 subsequent years.

PY2011 Energy Savings Assistance Program Annual Report
Energy Savings Assistance Program Table 11
Bill Savings Calculations by Program Year
San Diego Gas & Electric Company

Program Year	Program Costs	Program Lifecycle Bill Savings	Program Bill Savings/ Cost Ratio	Per Home Average Lifecycle Bill Savings
2008	\$ 16,420,247	\$ 8,908,748	0.54	\$ 468
2009	\$ 16,200,403	\$ 9,105,659	0.56	\$ 435
2010	\$ 18,890,522	\$ 11,227,334	0.59	\$ 520
2011 ^[1]	\$ 20,950,509	\$ 11,372,235	0.54	\$ 504

^[1] Report activity for the 3 prior years.

PY2011 Energy Savings Assistance Program Annual Report
Energy Savings Assistance Program Table 12
Whole Neighborhood Approach
San Diego Gas & Electric Company

A	B	C	D	E	F=(D+E)/C
Neighborhood (County, Zipcode, Zip+7 etc.)	Total Residential Customers	Total Estimated Eligible	Total Treated 2002-2010	Total Treated This Year	Penetration Rate
91910-34	199	135	150	12	120%
91910-36	260	160	174	23	123%
91910-47	251	65	141	18	243%
91911-17	610	370	285	51	91%
91911-27	252	114	199	91	255%
91911-52	369	157	88	6	60%
91914-35	425	9	12	2	152%
91932-16	378	230	180	9	82%
91932-23	464	275	249	12	95%
91941-76	472	161	90	12	63%
91942-74	178	89	18	5	26%
91942-75	75	38	13	1	37%
91950-26	289	179	111	19	73%
91950-28	231	153	68	3	46%
91950-29	118	83	86	0	104%
91950-50	320	188	203	14	115%
91950-68	326	197	143	8	77%
91950-69	365	295	219	22	82%
91977-14	389	163	128	9	84%
91977-22	280	127	99	16	90%
91977-23	199	102	91	1	91%
91977-25	306	119	85	5	75%
91977-39	454	239	151	57	87%
91977-66	425	228	108	25	58%
92019-30	299	102	132	25	154%
92019-32	375	106	23	8	29%
92019-33	456	123	78	10	71%

92020-33	407	185	99	53	82%
92020-34	247	112	153	2	139%
92020-35	385	234	189	65	109%
92020-38	259	159	80	9	56%
92020-39	191	122	66	2	56%
92020-40	499	343	321	23	100%
92020-44	186	109	104	4	99%
92020-47	421	273	233	40	100%
92020-48	526	345	303	74	109%
92020-49	437	265	204	23	86%
92020-54	391	258	102	101	79%
92020-60	178	106	77	2	74%
92020-63	120	52	15	1	31%
92020-65	391	202	260	21	139%
92020-76	540	274	230	56	104%
92020-89	52	26	17	0	66%
92021-10	416	143	42	5	33%
92021-29	384	172	110	41	88%
92021-45	466	194	85	23	56%
92021-46	334	159	87	11	62%
92021-47	475	225	195	33	101%
92021-48	755	380	271	14	75%
92021-51	550	191	99	9	56%
92021-54	494	202	40	10	25%
92021-64	279	162	136	9	89%
92021-68	554	359	428	12	123%
92021-69	418	276	228	66	106%
92021-70	442	273	230	43	100%
92021-80	79	48	60	10	146%
92021-85	377	206	215	5	107%
92025-20	351	233	234	22	110%
92025-29	379	303	275	17	96%
92025-32	425	250	209	7	86%
92025-39	413	161	98	7	65%
92025-48	249	153	91	16	70%
92025-57	353	199	151	66	109%

92026-30	349	219	172	2	80%
92027-26	248	165	180	1	110%
92027-33	507	289	365	74	152%
92027-34	328	180	124	32	87%
92027-36	427	208	157	19	85%
92027-38	263	107	137	1	129%
92028-23	336	140	84	24	77%
92028-28	346	168	149	51	119%
92028-40	515	308	262	43	99%
92028-47	65	44	24	5	66%
92036-92	64	19	10	0	54%
92040-20	510	179	145	17	90%
92040-29	363	128	43	2	35%
92040-45	527	157	78	4	52%
92054-31	345	224	85	1	38%
92054-32	398	255	227	6	91%
92054-35	412	198	216	7	113%
92054-36	683	257	129	3	51%
92054-44	161	78	40	0	51%
92057-43	402	147	72	14	58%
92058-17	356	173	75	10	49%
92065-19	179	46	50	3	116%
92065-20	279	71	56	1	80%
92065-21	204	81	133	0	164%
92065-23	208	52	22	5	52%
92065-24	195	49	8	4	25%
92065-26	292	129	46	9	43%
92065-28	255	85	49	2	60%
92065-32	190	32	6	0	19%
92065-39	187	95	5	0	5%
92065-41	561	47	6	3	19%
92065-52	278	110	152	1	139%
92065-70	128	17	2	1	18%
92069-27	458	283	154	8	57%
92069-28	551	357	398	29	120%
92083-35	458	294	172	19	65%

92083-36	208	98	84	3	89%
92083-51	332	210	211	0	101%
92083-62	263	72	91	1	129%
92083-80	317	136	51	25	56%
92084-35	596	317	93	5	31%
92084-40	294	165	128	65	117%
92084-41	335	159	97	49	92%
92084-50	452	264	196	15	80%
92102-12	361	119	74	6	67%
92102-40	201	160	114	10	77%
92103-40	469	119	8	2	8%
92104-18	420	213	108	9	55%
92104-27	504	303	107	2	36%
92104-30	502	305	69	1	23%
92104-37	528	275	146	8	56%
92104-47	485	170	34	5	23%
92104-56	305	106	25	1	24%
92104-64	151	90	22	2	27%
92104-67	74	41	13	2	37%
92105-10	440	292	191	41	79%
92105-13	536	427	344	65	96%
92105-28	616	463	449	11	99%
92105-41	297	213	167	7	82%
92105-46	583	362	260	46	85%
92105-58	425	269	241	30	101%
92107-14	617	221	43	2	20%
92111-68	476	177	98	1	56%
92113-18	456	313	251	10	83%
92113-29	340	220	201	15	98%
92113-37	303	245	232	2	96%
92113-43	372	288	247	7	88%
92113-58	27	20	21	0	104%
92116-19	651	173	45	3	28%
92116-22	361	139	53	1	39%
92116-24	496	236	91	2	39%
92117-58	344	130	26	2	21%

92117-59	211	60	16	0	27%
92117-63	369	151	31	1	21%
92117-64	322	127	7	1	6%
92129-29	446	56	55	3	103%
92139-18	246	100	72	16	88%
92139-19	364	177	51	127	101%
92139-20	231	112	54	27	72%
92154-19	485	239	148	13	67%
92173-21	466	238	168	34	85%
92173-24	379	292	171	49	75%
92173-28	361	226	59	8	30%

PY2011 Energy Savings Assistance Program Annual Report
Energy Savings Assistance Program Table 13
Categorical Enrollment
San Diego Gas & Electric Company

Type of Enrollment	Number of customers enrolled
Standard Enrollment	5,028
Categorical Eligibility	5,219
Self-Certification	12,328
Other (please list)	-
Total number of customers enrolled	22,575

PY 2011 Energy Savings Assistance Program Annual Report
Energy Savings Assistance Program Table 15
Integration
San Diego Gas & Electric Company

Integration Efforts				
Coordination Type	New Integration Efforts in PY 2011	Results		
		Cost and/or Resource Savings		
Interdepartmental, Program Coordination, Data Sharing, ME&O, etc.	[Brief description of effort]	Estimated \$ Savings	Methodology [1]	Other Results
Program Coordination	Worked with California Solar Initiative (CSI)	N/A	Expedited homes treated in order for customers to participate in CSI programs	
Interdepartmental	CARE/Energy Savings Assistance Program combined message in all marketing material	N/A	No dollar impact. Integration effort was designed to increase awareness.	
Interdepartmental	CARE/Energy Savings Assistance Program combined message to be included in general energy efficiency collateral as appropriate	N/A	No dollar impact. Integration effort was designed to increase awareness.	
Data Sharing	Marketing to customers enrolled in CARE and/or Medical Baseline	N/A	No dollar impact. Effort provided targeted lead generation	

[1] Integration efforts are measurable and quantifiable in terms of dollars saved by the IOU (Shared resources, shared marketing materials, shared information technology, shared programmatic infrastructure, among others are just some examples of cost and/or resource savings to the IOU). In footnotes, provide information on methodology used to calculate cost and/or resource savings.

PY 2011 Energy Savings Assistance Program Annual Report
 Energy Savings Assistance Program Table 16
 Lighting

San Diego Gas & Electric Company

Energy Savings Assistance Program CFL Tracking Table 1¹

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

Bulb Name / Identification	Bulb Description (wattage, lumens)	Bulb Cost (material)	Admin Cost (overhead, contractor fee, marketing, etc.)	Total Bulb Cost (material + admin)	AB 1109 Compliant? ²
CFLs					
Lights of America	14 watt CFL	\$ 5.00	\$ 1.90	\$ 6.90	Yes
Lights of America	19 watt CFL	\$ 5.00	\$ 1.90	\$ 6.90	Yes
Lights of America	23 watt CFL	\$ 5.00	\$ 1.90	\$ 6.90	Yes
Other CFLs					
Interior Hardwired Fixtures	Two 18 watt CFLs	N/A	N/A	\$ 60.51	Yes
Torchieres	26W/26W/18W CFLs	N/A	N/A	\$ 77.82	Yes
Exterior Hardwired Fixtures	18 W CFL Porch Lights	N/A	N/A	\$ 44.53	Yes

1) Established through Section 9.3.4, D. 08-11-031

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

Year	Number of Homes Treated in ESA Program	Number of Homes Provided CFLs	Avg. # of CFL bulbs given per home	Est. total energy savings from installed CFLs
2009	20,927	17,653	6	1,796,496
2010	21,593	17,016	7	1,796,176
2011	22,575	17,246	6	1,697,568

PY 2011 Energy Savings Assistance Program Annual Report
Energy Savings Assistance Program Table 17
Studies & Pilot Status
San Diego Gas & Electric Company

	PY Authorized Budget [1]				PY Actual Expenses				% of Budget Spent	% of Project Completed	On Schedule?	Energy Savings Measured
	2009	2010	2011	Total	2009	2010	2011	Total				
Studies												
Joint Utility Non Energy Benefits (NEB) Study [2]	\$ 10,000	\$ 10,000	\$ 10,000	\$ 30,000	\$ 29,322	\$ (13,690)		\$ 15,632	52%	100%	Yes, Completed	Not Applicable
Joint Utility LIEE 2009 Process Evaluation [3]	\$ 12,500	\$ 12,500	\$ 12,500	\$ 37,500			\$ 37,401	\$ 37,401	100%	100%	Yes, Completed	Not Applicable
Joint Utility Electric Refrigerator Degradation [4]	\$ 66,667			\$ 66,667				\$ -	0%	90%	Yes	Not Applicable
Joint Utility 2009 LIEE Impact Evaluation [5]			\$ 90,000	\$ 90,000		\$ 47,692	\$ 40,765	\$ 88,457	98%	100%	Yes, Completed	Not Applicable
Pilots												
In Home Display [6]		\$ 145,000	\$ 86,443	\$ 231,443	\$ 12,912	\$ 102,453	\$ 116,078	\$ 231,443	100%	100%	Yes, Completed	Not Applicable
Programmable Controllable Thermostat [6]			\$ 183,557	\$ 183,557			\$ 141,044	\$ 141,044	77%	100%	Yes, Completed	Not Applicable
Workforce, Education & Training Pilot	\$ 7,653	\$ 7,653	\$ 7,379	\$ 22,685			\$ 20,767	\$ 20,767	92%	100%	Yes, Completed	Not Applicable

[1] All Pilots and Studies were authorized in D.08-11-031 for the 2009-11 ESA program.

[2] SDG&E was the project-manager of the Non Energy Benefits Study; paying the consultant the total Joint Utility contracted amount, and cross-billing PG&R, SCE, and SCG for their shares. The credit is due to cross-billing payments in 2010 for 2009 contract expenditures.

[3] PG&E was the project-manager of the Process Evaluation; paying the consultant the total Joint Utility contracted amount, and cross-billing SCE, SCG, and SDG&E for their shares. The credit is due to cross-billing payments in 2011 for 2010 contract expenditures.

[4] The Refrigerator Degradation study is occurring during 2010-2012, and is being completed in 2012. Data was available for use in the 2012-2014 ESA Program Applications. PG&E is the project manager and will invoice SCE and SDG&E in 2012.

[5] The \$600,000 requested to conduct the Joint Utility Impact Evaluation was denied in D.08-11-031. The IOUs were directed by the Commission to utilize \$600,000 authorized in D.06-12-038 for this purpose, and to carry it over to 2009-2011. SDG&E's portion of the Joint Utility budget was \$90,000.

[6] Commission granted SDG&E's motion to shift funds from the Programmable Controllable Thermostat Pilot to the In Home Display Pilot. The authorized fund shift is reflected in the dollars shown herein.

PY 2011 Energy Savings Assistance Program Annual Report
Energy Savings Assistance Program Table 18
"Add Back" Measures
San Diego Gas & Electric Company

Measure	Climate Zone	Ratio of Benefits Over Costs			Quantity Installed	Budget Impact of "add Back"	Energy Savings Impact
		Utility Cost Test	Modified Participant Test	Total Resource Cost Test			
Gas furnace repair/replace.gas.MF, cz10	10	0.00	0.00	0.00	363	19,576.68	0.00
Gas furnace repair/replace.gas.MF, cz14	14	n/a	n/a	n/a	n/a	n/a	n/a
Gas furnace repair/replace.gas.MF, cz15	15	n/a	n/a	n/a	n/a	n/a	n/a
Gas furnace repair/replace.gas.MF, cz7	7	0.00	0.00	0.00	542	32,133.49	0.00
Gas furnace repair/replace.gas.MH, cz10	10	0.05	0.07	0.03	294	358,249.07	9,295.98
Gas furnace repair/replace.gas.MH, cz14	14	n/a	n/a	n/a	n/a	n/a	n/a
Gas furnace repair/replace.gas.MH, cz15	15	n/a	n/a	n/a	n/a	n/a	n/a
Gas furnace repair/replace.gas.MH, cz7	7	0.04	0.06	0.03	156	187,607.73	4,110.47
Gas furnace repair/replace.gas.SF, cz10	10	0.08	0.11	0.22	1,587	622,159.51	26,284.40
Gas furnace repair/replace.gas.SF, cz14	14	n/a	n/a	n/a	n/a	n/a	n/a
Gas furnace repair/replace.gas.SF, cz15	15	n/a	n/a	n/a	n/a	n/a	n/a
Gas furnace repair/replace.gas.SF, cz7	7	0.07	0.10	0.19	1,354	527,423.80	19,367.38
Room AC, MF, cz10	10	0.07	0.05	0.06	184	185,224.04	7,219.26
Room AC, MH, cz10	10	n/a	n/a	n/a	n/a	n/a	n/a
Room AC, SF, cz10	10	0.20	0.15	0.18	71	68,482.90	9,099.93
Water heater repair/replace, gas	n/a	0.12	0.10		165	150,004.00	20,479.66
Tankless water heater	n/a	n/a	n/a	n/a	n/a	n/a	n/a

¹ Dollars spent on these Add Back Measures

PY 2011 Energy Savings Assistance Program Annual Report
 Energy Savings Assistance Program Table 19
 Fund Shifting
 San Diego Gas & Electric Company

Program Year 2011	Total Authorized	Total Shifted ¹	% of Authorized Total	Carried Forward/Carried Back	To/From Year	To/From Category-Subcategory	Advice Letter Number
Energy Savings Assistance Program :	ex. \$x,xxx.xx	(\$x,xxx)	x%	Carried Forward	From 2008	From In-Home Energy Education	G-xxxx
Energy Efficiency							
Program Year 2011	Total Authorized	Total Shifted¹	% of Authorized Total	Carried Forward/Carried Back	To/From Year	To/From Category-Subcategory	Advice Letter Number
LIEE Program:	ex. \$x,xxx.xx	(\$x,xxx)	x%	Carried Forward	From 2008	From In-Home Energy Education	G-xxxx
Energy Efficiency							
- Gas Appliances	\$ 1,989,532	\$ 2,222,800	11%	Carried Forward	From 2010	From 2010 carried forward (unspent electric funds shifted to gas) \$2,222,800.	ALJ Ruling dated 11/21/2011 granting SDG&E Motion to Shift ESAP Funds filed on 10/24/2011.
- Electric Appliances	\$ 7,668,938		0%				
- Weatherization	\$ 4,185,285	\$ 2,810,539	14%	Carried Back Carried Forward	To 2010 From 2010	From 2011 Weatherization Authorized Budget (\$708,461). From 2010 carried forward (unspent electric funds shifted to gas) \$3,519,000.	Authorized by D.08-11-031 and as modified by D.10-10-008. ALJ Ruling dated 11/21/2011 granting SDG&E Motion to Shift ESAP Funds filed on 10/24/2011.
- Outreach and Assessment	\$ 1,936,480	\$ 1,330,172	7%	Carried Forward	From 2010	From 2010 carried forward (unspent electric funds shifted to gas) \$482,500. Shift from 2011 In Home Energy Education (gas funds to O&A gas funds) \$182,586.	Authorized by D.08-11-031 and as modified by D.10-10-008.
- In Home Energy Education	\$ 1,174,322	\$ (182,586)	-1%	2011 Authorized Budget	From 2011	From 2010 carried forward (unspent electric funds to O&A electric funds) \$665,086.	Authorized by D.08-11-031 and as modified by D.10-10-008.
- Education Workshops	\$ -		0%			Shift to Outreach & Assessment gas funds (\$182,586) from In Home Energy Education gas funds.	
- Pilots:							
In Home Display	\$ -	\$ 116,079	1%	Carried Forward 2011 Authorized Budget Carried Forward	From 2010 From 2011 From 2010	From 2010 carried forward (unspent electric funds) \$40,000. (IHD Pilot \$20,000 elec / \$20,000 gas). Shift from 2011 PCT Pilot electric funds \$46,443. (IHD Pilot - \$23,222 elec / \$23,222 gas). From 2010 carried forward unspent IHD Pilot funds \$29,635 (\$14,818 elec / \$14,818 gas).	ALJ Ruling dated 12/30/2011 granting SDG&E Motion to Shift unspent funds from the Programmable Communicating Thermostat Pilot to the In-Home Display Pilot filed on 12/01/2011. Authorized by D.08-11-031 and as modified by D.10-10-008.
Programmable Controllable Thermostat	\$ 234,441	\$ (46,443)	0%	2011 Authorized Budget	From 2011	Shift To In Home Display Pilot (46,443) (from PCT \$23,222 electric and \$23,222 gas funds).	ALJ Ruling dated 12/30/2011 granting SDG&E Motion to Shift unspent funds from the Programmable Communicating Thermostat Pilot to the In-Home Display Pilot filed on 12/01/2011.
WE&T Pilot	\$ 7,379	\$ 13,388	0%	Carried Forward	From 2010	From 2010 carried forward unspent WET Pilot Funds \$13,388.	Authorized by D.08-11-031 and as modified by D.10-10-008.
Energy Efficiency TOTAL	\$ 17,196,378	\$ 6,263,949					
Training Center	\$ -						
Inspections	\$ 62,694	\$ 3,232	0%	Carried Forward	From 2010	From 2010 carried forward unspent electric and gas funds totalling \$3,232 (\$1,616 elec / \$1,616 gas) to 50/50 gas and electric.	Authorized by D.08-11-031 and as modified by D.10-10-008.
Marketing	\$ 814,341						
M&E Studies	\$ (45,864)	\$ 124,030	1%	Carried Forward	From 2010	From 2010 carried forward M&E Studies unspent funds electric and gas funds totalling \$124,030 to 50/50 gas and electric.	Authorized by D.08-11-031 and as modified by D.10-10-008.
Regulatory Compliance	\$ 286,006						
General Administration	\$ 1,969,104						
CPUC Energy Division	\$ 44,947						
TOTAL PROGRAM COSTS	\$ 20,327,606	\$ 6,391,211	31%				

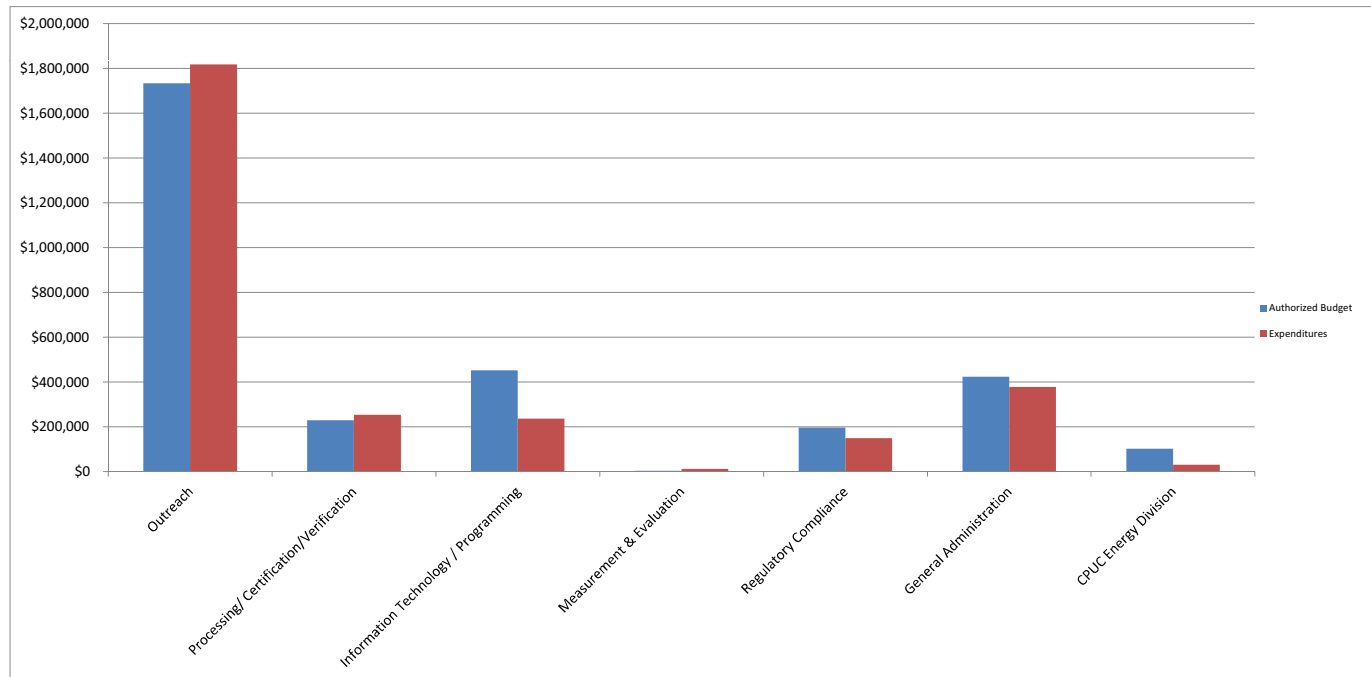
1) Numbers reported in standard accounting format, with negative amounts displayed in parentheses (\$xxx.xx).

2011 CARE Annual Report
CARE Table 1 - Overall Program Expenses
San Diego Gas & Electric Company

Standardized CARE Administrative Cost Reporting Categories							
2011 Costs by Energy Source							
Category	Residential		Expanded		Total	Authorized Budget	% Budget Spent
	Electric	Gas	Electric	Gas			
Outreach	\$1,417,160	\$400,614			\$1,817,774	\$1,734,261	105%
Automatic Enrollment	\$0	\$0			\$0	\$0	0%
Processing/ Certification/Verification	\$197,678	\$56,026			\$253,704	\$230,015	110%
Information Technology / Programming	\$184,598	\$52,133			\$236,731	\$452,687	52%
Pilots	\$0	\$0			\$0	\$0	0%
Measurement & Evaluation	\$10,413	\$2,937			\$13,350	\$4,326	309%
Regulatory Compliance	\$116,369	\$32,921			\$149,290	\$196,401	76%
General Administration	\$294,751	\$83,288			\$378,039	\$423,927	89%
CPUC Energy Division	\$24,664	\$6,956			\$31,620	\$102,900	31%
One E App	\$0	\$0			\$0	\$0	0%
TOTAL Program Costs	\$2,245,633	\$634,875			\$2,880,508	\$3,144,517	92%
CARE Rate Discount	\$49,869,157	\$13,708,148			\$63,577,305	\$49,919,937	127%
Service Establishment Charge Discount	\$0	\$0			\$0	\$0	0%
TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	\$52,114,790	\$14,343,023			\$66,457,813	\$53,064,454	125%

*Due to the relatively small dollar amount, SDG&E does not record the CARE Expansion Program's cost separately from the regular CARE program cost.

Bar Chart 1 - Total Authorized Budget vs. Actual Expenses by Category



2011 CARE Annual Report
CARE Table 2 - Enrollment, Recertification, Attrition, & Penetration
San Diego Gas & Electric Company

2011	Gross Enrollment											Enrollment		Total CARE Participants	Estimated CARE Eligible	Penetration Rate % (P/Q)	
	Automatic Enrollment					Capitation	Other Sources ⁵	Total (G+H+I)	Recertification	Total Adjusted (J+K)	Attrition (Drop Offs)	Net (L-M)	Net Adjusted (N-K)				
	Inter-Utility ¹	Intra-Utility ²	Leveraging ³	One-e-App ⁴	SB580												Combined (B+C+D+E+F)
January	1,011	79	0	0	0	1,090	368	6,843	8,301	7,051	15,352	5,309	10,043	2,992	296,430	358,328	82.7%
February	1	3	30	0	0	34	293	5,704	6,031	4,054	10,085	4,795	5,290	1,236	297,666	358,328	83.1%
March	0	355	0	0	0	355	520	6,495	7,370	7,018	14,388	5,617	8,771	1,753	299,419	358,328	83.6%
April	1	6	70	0	0	77	373	7,115	7,565	4,666	12,231	6,560	5,671	1,005	300,424	359,622	83.5%
May	0	241	3	0	0	244	367	5,377	5,988	4,530	10,518	3,526	6,992	2,462	302,886	359,622	84.2%
June	0	183	11	0	0	194	360	5,456	6,010	4,849	10,859	7,352	3,507	-1,342	301,544	359,622	83.9%
July	0	42	0	0	0	42	262	6,117	6,421	3,514	9,935	2,743	7,192	3,678	305,222	361,555	84.4%
August	0	163	24	0	0	187	343	6,796	7,326	4,736	12,062	7,284	4,778	42	305,264	361,555	84.4%
September	0	105	0	0	0	105	300	6,299	6,704	4,835	11,539	5,424	6,115	1,280	306,544	361,555	84.8%
October	0	169	0	0	0	169	427	5,706	6,302	2,040	8,342	4,256	4,086	2,046	308,590	362,551	85.1%
November	64	104	0	0	0	168	308	4,382	4,858	4,915	9,773	5,936	3,837	-1,078	307,512	362,551	84.8%
December	0	208	0	0	0	208	298	6,504	7,010	4,848	11,858	5,926	5,932	1,084	308,596	362,551	85.1%
Total for 2011	1,077	1,658	138	0	0	2,873	4,219	72,794	79,886	57,056	136,942	64,728	72,214	15,158	308,596	362,551	85.1%

¹ Enrollments via data sharing between the IOUs.

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

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

⁴ One-E-App is a pilot program set up by The Center to Promote Healthcare Access (the Center) and PG&E. The pilot will occur within two PG&E counties and looks to implement a strategy of automatic enrollment for low-income customers into the CARE program based on the customers' applications or reapplications for related low-income health and social welfare services. (e.g. MediCAL, Healthy Families, CALKids, etc.) The goal is to develop another means by which low income families can be introduced into the CARE

⁵ Not including Recertification.

Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

2011 CARE Annual Report
CARE Table 3 - Standard Random Verification Results ¹
San Diego Gas & Electric Company

	Total CARE Population	Participants Requested to Verify	% of Population Total	Participants Dropped (Due to no response)	Participants Dropped (Verified as Ineligible)	Total Dropped	% Dropped through Random Verification	% of Total Population Dropped
January 2011	296,430	594	0.20%	314	71	385	64.81%	0.13%
February 2011	297,666	579	0.19%	312	67	379	65.46%	0.13%
March 2011	299,419	685	0.23%	333	66	399	58.25%	0.13%
April 2011	300,424	794	0.26%	409	102	511	64.36%	0.17%
May 2011	302,886	400	0.13%	207	52	259	64.75%	0.09%
June 2011	301,544	831	0.28%	432	96	528	63.54%	0.18%
July 2011	305,222	709	0.23%	396	60	456	64.32%	0.15%
August 2011	305,264	827	0.27%	419	79	498	60.22%	0.16%
September 2011	306,544	821	0.27%	431	70	501	61.02%	0.16%
October 2011	308,590	991	0.32%	532	88	620	62.56%	0.20%
November 2011	307,512	1019	0.33%	583	196	779	76.45%	0.25%
December 2011	308,596	993	0.32%	367	105	232	23.36%	0.08%
Total for 2011	308,596	9,243	3.00%	4,434	1,113	5,547	60.01%	1.80%

Note:

Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

2011 CARE Annual Report
CARE Table 4 - CARE Self-Certification and Self-Recertification Applications¹
San Diego Gas & Electric Company

	Provided²	Received³	Approved⁴	Denied⁵	Pending/Never Completed⁶	Duplicates⁷
Total	2,514,741	151,502	141,737	4,670	3,811	1,284
Percentage		0.00%	93.6%	3.1%	2.5%	0.8%

Notes:

Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

¹ Includes sub-metered customers.

² Estimate of all application distribution methods utilized to reach qualified customers through methods such as internet, door-to door solicitation, recertification, bill inserts, etc.

³ All applications received for processing

⁴ Applications with eligible status and not a duplicate

⁵ Applications with an ineligible status and not a duplicate

⁶ Applications with a cancel or send back status and not a duplicate

⁷ Duplicates are more than one application received on the same day

2011 CARE Annual Report
CARE Table 5 - Enrollment by County
San Diego Gas & Electric Company

County	Estimated Eligible			Total Participants			Penetration Rate		
	Urban ¹	Rural ²	Total	Urban	Rural	Total	Urban	Rural	Total
SAN DIEGO	327,981	18,473	346,455	281,962	12,627	294,589	86.0%	68.4%	85.0%
ORANGE	16,097	-	16,097	14,007	-	14,007	87.0%	-	87.0%
Total	344,078	18,473	362,551	295,969	12,627	308,596	86.0%	68.4%	85.1%

Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

¹ Urban vs Rural (Goldsmith Standard)

² Urban vs Rural (Goldsmith Standard)

2011 CARE Annual Report
CARE Table 6 - Recertification Results
San Diego Gas & Electric Company

2011	Total CARE Population	Participants Requested to Recertify	% of Population Total (C/B)	Participants Recertified ²	Participants Dropped	Recertification Rate % (E/C)	% of Total Population Dropped (F/B)
January	296,430	2616	0.88%	1959	569	74.89%	0.19%
February	297,666	3354	1.13%	2448	704	72.99%	0.24%
March	299,419	3026	1.01%	2115	721	69.89%	0.24%
April	300,424	3187	1.06%	2276	688	71.42%	0.23%
May	302,886	1905	0.63%	1321	413	69.34%	0.14%
June	301,544	4221	1.40%	3184	814	75.43%	0.27%
July	305,222	3037	1.00%	2226	662	73.30%	0.22%
August	305,264	2997	0.98%	2032	764	67.80%	0.25%
September	306,544	3212	1.05%	2096	840	65.26%	0.27%
October	308,590	2982	0.97%	1895	898	63.55%	0.29%
November	307,512	3222	1.05%	1921	1103	59.62%	0.36%
December	308,596	3,027	0.98%	1782	496	58.87%	0.16%
Total for 2011	308,596	36,786	11.92%	25,255	8,672	74.89%	2.81%

Note:

Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

¹ Participants requested to recertify.

² Participants recertified number does not include the customers who are recertified through SDG&E's CARE eligible probability model and reflect only those who were requested recertified.

³ Recertification results are tied to the month initiated. Therefore, recertification results may be pending due to the time permitted for a participant to recertify.

2011 CARE Annual Report
CARE Table 7 - Capitation Contractors
San Diego Gas & Electric Company

Contractor Name	Contractor Type (Check one or more if applicable)				Enrollments		
	Private	CBO	WMDVBE	LIHEAP	Rural	Urban	Total
AFRICAN ALLIANCE		X	X		0	53	53
AKA HEAD START		X			0	19	19
AMERICAN RED CROSS WIC			X		0	3717	3717
BARRIO STATION		X			0	5	5
BAYSIDE COMMUNITY CENTER		X			0	5	5
BLACK CONTRACTORS ASSOCIATION INC	X		X		0	1	1
CAMPESINOS UNIDOS, INC		X	X		0	404	404
CASA FAMILIAR		X			0	38	38
CASH PLUS	X				0	23	23
CATHOLIC CHARITIES		X			0	1631	1631
CHICANO FEDERATION		X			0	1	1
CHILDREN'S INITIATIVE			X		0	59	59
CHINESE SERVICE CENTER OF SAN DIEGO		X	X		0	56	56
CHULA VISTA COMMUNITY COLLABORATIVE		X	X		0	79	79
CITY HEIGHTS COMMUNITY DEVELOPMENT CORP		X			0	5	5
CRISIS HOUSE		X	X		0	71	71
DEAF COMMUNITY SERVICES			X		0	1	1
ELDER HELP OF SAN DIEGO 2009		X			0	3	3
FEEDING AMERICA SAN DIEGO		X			0	308	308
FOSTER LIFT		X	X		0	53	53
HARMONIUM 2009		X			0	11	11
HEARTS AND HANDS TOGETHER		X	X		0	103	103
HOME START 2011		X	X		0	154	154
HORN OF AFRICA		X			0	110	110
INTERNATIONAL RESCUE COMMITTEE		X			0	88	88
IRAQI COMMUNITY SOCIAL SERVICES		X			0	4	4
KURISH HUMAN RIGHTS WATCH, INC			X		0	22	22
LA MAESTRA FAMILY CLINIC 2009		X	X		0	133	133
LEGAL AID SOCIETY			X		0	7	7
LIBERTY TAX SERVICE	X				0	12	12
MAAC PROJECT		X		X	0	237	237
MABUHAY ALLIANCE		X			0	115	115
MOUNTAIN HEALTH & COMMUNITY SERVICES, INC.		X			0	1	1
NEIGHBORHOOD HEALTHCARE		X			0	432	432
NEIGHBORHOOD HOUSE			X		0	111	111
NORTH COUNTY HEALTH PROJECT			X		0	108	108
NORTH COUNTY INTERFAITH		X			0	13	13
PAZZAZ			X		0	2	2
REBUILDING TOGETHER SAN DIEGO		X	X		0	52	52
SALVATION ARMY		X			0	20	20
SAN DIEGO FOOD BANK		X			0	17	17
SAN YSIDRO HEALTH CENTER			X		0	443	443
SAY SAN DIEGO		X			0	90	90
SCRIPPS HEALTH WIC			X		0	277	277
SAN DIEGO STATE UNIVERSITY WIC		X	X		0	1551	1551
SERVICENTRO SAN CLEMENTE, INC	X		X		0	112	112
SOMALI FAMILY SERVICE OF SAN DIEGO		X			0	1	1
SOMALI YOUTH UNITED, INC.		X	X		0	5	5
SOUTH BAY COMMUNITY SERVICES		X			0	4	4
SOUTHERN CALIFORNIA TRIBAL CHAIRMEN'S ASSOCIATION		X	X		0	50	50
THE HARRIS GROUP	X				0	206	206
UNION OF PAN ASIA		X			0	65	65
VISTA COMMUNITY CLINIC		X			0	300	300
YMCA YOUTH AND FAMILY SERVICES		X			0	60	60
Total Enrollments and Expenditures					0	11,448	11,448

Note:

Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

Data reflected in the enrollments are based on the capitation contracts zipcode.

2011 CARE Annual Report
CARE Table 8 - Participants per Month
San Diego Gas & Electric Company

2011	Gas and Electric	Gas Only	Electric Only	Total	Eligible Households	Penetration	% Change¹
January	199,971	N/A	96,459	296,430	358,328	82.7%	1.02%
February	200,616	N/A	97,050	297,666	358,328	83.1%	0.32%
March	202,324	N/A	97,095	299,419	358,328	83.6%	0.85%
April	202,851	N/A	97,573	300,424	359,622	83.5%	0.26%
May	204,457	N/A	98,429	302,886	359,622	84.2%	0.79%
June	204,032	N/A	97,512	301,544	359,622	83.9%	-0.21%
July	206,353	N/A	98,869	305,222	361,555	84.4%	1.14%
August	205,893	N/A	99,371	305,264	361,555	84.4%	-0.22%
September	207,073	N/A	99,471	306,544	361,555	84.8%	0.57%
October	210,451	N/A	98,139	308,590	362,551	85.1%	1.63%
November	207,644	N/A	99,868	307,512	362,551	84.8%	-1.33%
December	208,592	N/A	100,004	308,596	362,551	85.1%	0.46%
Total for 2011	208,592	N/A	100,004	308,596	362,551	85.1%	0.46%

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

Note:

Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

2011 CARE Annual Report
CARE Table 9 - Average Monthly Usage & Bill
San Diego Gas & Electric Company

Average Monthly Gas / Electric Usage			
Residential Non-CARE vs. CARE Customers¹			
	Gas Therms	Gas Therms	
Customer	Tier 1	Tier 2	Total
Non-CARE	24.4	7.5	31.9
CARE	20.1	5.2	25.3
	Electric KWh	Electric KWh	
Customer	Tier 1	Tier 2	Total
Non-CARE	286.8	220	506.8
CARE	284.5	136.3	420.8

Average Monthly Gas / Electric Bill		
Residential Non-CARE vs. CARE Customers¹		
(Dollars per Customer)		
Customer	Gas	Electric
Non-CARE	\$51.86	\$98.80
CARE	\$22.38	\$49.21

1 Excludes master-meter usage.

2011 CARE Annual Report
CARE Table 10- CARE Surcharge & Revenue
San Diego Gas & Electric Company

Electric					
CARE Surcharge and Revenue Collected by Customer Class					
Customer	Average Monthly		CARE Surcharge as Percent of Bill	Total CARE	Percentage of
	CARE Surcharge	Monthly Bill		Surcharge Revenue	CARE Surcharge
Class	CARE Surcharge	Monthly Bill	as Percent of Bill	Collected	Revenue Collected
Residential*	\$1.42	\$96.00	1.50%	\$16,076,973	31.99%
Commercial	\$12.26	\$633.00	1.90%	\$21,237,957	42.25%
Agricultural	\$19.07	\$911.00	2.10%	\$889,942	1.77%
Large/Indust	\$1,467.87	\$44,327.00	3.30%	\$12,058,554	23.99%

* Excludes CARE customers

GAS					
CARE Surcharge and Revenue Collected by Customer Class					
Customer	Average Monthly		CARE Surcharge as Percent of Bill	Total CARE	Percentage of
	CARE Surcharge	Monthly Bill		Surcharge Revenue	CARE Surcharge
Class	CARE Surcharge	Monthly Bill	as Percent of Bill	Collected	Revenue Collected
Residential	\$0.87	\$32.00	2.70%	\$6,371,512	48.05%
Commercial	\$14.40	\$295.00	4.90%	\$5,202,772	39.24%
Natural Gas Vehicle	\$947.95	\$7,490.00	12.70%	\$328,940	2.48%
Industrial	\$1,879.70	\$6,390.00	29.40%	\$1,357,141	10.23%

NOTES:

Industrial includes both G-NT(D) and G-NT(T) and is net of volumes qualifying for G-COG.

2011 CARE Annual Report
CARE Table 11 - CARE Capitation Applications
SAN DIEGO GAS & ELECTRIC

CARE Capitation Applications					
January 1, 2011 through December 31, 2011					
Entity	2011	Approved	Denied	Pending/ Never Completed	Duplicate
AFRICAN ALLIANCE	60	53	2	2	3
AKA HEAD START	20	19	1	0	0
AMERICAN RED CROSS WIC PROGRAM EL CAJON	308	264	15	24	5
AMERICAN RED CROSS WIC PROGRAM EUCLID	468	370	32	64	2
AMERICAN RED CROSS WIC PROGRAM LEMON GROVE	977	780	77	113	7
AMERICAN RED CROSS WIC PROGRAM LINDA VISTA	442	342	54	43	3
AMERICAN RED CROSS WIC PROGRAM OCEANSIDE	1151	1017	61	66	7
AMERICAN RED CROSS WIC PROGRAM SPRING VALLEY	335	295	20	20	0
AMERICAN RED CROSS WIC PROGRAM UNIVERSITY OFFICE	788	649	60	73	6
BARRIO STATION	5	5	0	0	0
BAYSIDE COMMUNITY CENTER	6	5	1	0	0
BLACK CONTRACTORS ASSOCIATION INC	1	1	0	0	0
CAMPESINOS UNIDOS, INC	420	404	3	10	3
CASA FAMILIAR	42	38	3	0	1
CASH PLUS	23	23	0	0	0
CATHOLIC CHARITIES - Downtown	1529	1397	40	74	18
CATHOLIC CHARITIES - Mission Gorge	301	234	11	36	20
CHICANO FEDERATION	1	1	0	0	0
CHILDREN'S INITIATIVE	64	59	1	4	0
CHINESE SERVICE CENTER OF SAN DIEGO	66	56	4	6	0
CHULA VISTA COMMUNITY COLLABORATIVE	84	79	1	3	1
CITY HEIGHTS COMMUNITY DEVELOPMENT CORP	5	5	0	0	0
CRISIS HOUSE	73	71	1	0	1
DEAF COMMUNITY SERVICES	1	1	0	0	0
ELDER HELP OF SAN DIEGO 2009	3	3	0	0	0
FEEDING AMERICA SAN DIEGO	326	308	8	9	1
FOSTER LIFT	54	53	0	1	0
HARMONIUM 2009	13	11	0	2	0
HEARTS AND HANDS TOGETHER	108	103	1	4	0

HOME START 2011	169	154	4	11	0
HORN OF AFRICA	112	110	1	1	0
INTERNATIONAL RESCUE COMMITTEE	90	88	1	0	1
IRAQI COMMUNITY SOCIAL SERVICES	4	4	0	0	0
KURISH HUMAN RIGHTS WATCH, INC	23	22	0	0	1
LA MAESTRA FAMILY CLINIC 2009	161	133	11	16	1
LEGAL AID SOCIETY OF SAN DIEGO, INC	2	2	0	0	0
LEGAL AID SOCIETY OF SAN DIEGO, INC	5	5	0	0	0
LIBERTY TAX SERVICE (15) TRAVELING TAX GUY, INC	1	1	0	1	1
LIBERTY TAX SERVICE (2)	8	8	0	0	0
LIBERTY TAX SERVICE (5)	1	1	0	0	0
LIBERTY TAX SERVICE (6) SMALL BUS. PLANNING SOURCE	3	2	0	0	1
MAAC PROJECT	262	237	13	9	3
MABUHAY ALLIANCE	136	115	11	9	1
MOUNTAIN HEALTH & COMMUNITY SERVICES, INC.	1	1	0	0	0
NEIGHBORHOOD HEALTH CARE	152	137	8	6	1
NEIGHBORHOOD HEALTHCARE-EC	317	295	12	6	4
NEIGHBORHOOD HOUSE	147	111	10	21	5
NORTH COUNTY HEALTH PROJECT	28	26	2	0	0
NORTH COUNTY HEALTH PROJECT-WIC	94	82	5	7	0
NORTH COUNTY INTERFAITH COUNCIL - ESCONDIDO	11	11	0	0	0
NORTH COUNTY INTERFAITH COUNCIL - OCEANSIDE	3	2	0	1	0
PAZZAZ	2	2	0	0	0
REBUILDING TOGETHER SAN DIEGO	54	52	1	0	1
SALVATION ARMY - CHULA VISTA	9	9	1	0	1
SALVATION ARMY - EL CAJON	7	7	0	0	0
SALVATION ARMY - ESCONDIDO	3	2	0	0	1
SALVATION ARMY - KROC CENTER	2	2	0	0	0
SAN DIEGO FOOD BANK	19	17	0	2	0
SAN YSIDRO HEALTH CENTER - NATIONAL CITY	63	42	8	13	0
SAN YSIDRO HEALTH CENTER - WIC - CHULA VISTA	574	396	62	109	7
SAN YSIDRO HEALTH CENTER - WIC-IMPERIAL BEACH	2	2	0	0	0
SAN YSIDRO HEALTH CENTER CHULA VISTA FAMILY CLINIC	5	3	0	1	1
SAY SAN DIEGO	95	90	1	3	1
SCRIPPS HEALTH - CHULA VISTA WIC	85	80	2	3	0
SCRIPPS HEALTH - CITY HEIGHTS WELLNESS CENTER WIC	91	75	9	7	0
SCRIPPS HEALTH - LINDA VISTA FAMILY CARE WIC	1	1	0	0	0
SCRIPPS HEALTH - PARADISE VALLEY HOSPITAL MOB WIC	2	2	0	0	0
SCRIPPS HEALTH WIC	137	119	8	10	0

SDSU / Chula Vista WIC Office	102	89	5	5	3
SDSU / El Cajon WIC Office	261	229	13	14	5
SDSU / Escondido WIC Office	212	188	11	11	2
SDSU / Fallbrook WIC Office	138	123	7	3	5
SDSU / Genessee Ave WIC	199	172	9	18	0
SDSU / Mira Mesa WIC Office	261	232	15	12	2
SDSU / North Park WIC Office	189	165	12	10	2
SDSU / Southeast WIC Office	164	138	11	13	2
SDSU / Spring Valley WIC	93	78	6	9	0
SDSU / Vista WIC	152	137	8	5	2
SERVICENTRO SAN CLEMENTE, INC	123	112	8	3	0
SOMALI FAMILY SERVICE OF SAN DIEGO	1	1	0	0	0
SOMALI YOUTH UNITED, INC.	6	5	1	0	0
SOUTH BAY COMMUNITY SERVICES	4	4	0	0	0
SOUTHERN CALIFORNIA TRIBAL CHAIRMEN'S ASSOCIATION	77	50	14	13	0
Union of Pan Asia Communities Counsel & Treatment	33	25	5	3	0
Union of Pan Asia Communities Headquarters	42	40	0	1	1
VISTA COMMUNITY CLINIC	365	300	18	43	4
YMCA - ROBINSON	5	5	0	0	0
YMCA YOUTH AND FAMILY SERVICES	61	55	1	3	2
Grand Total	13,043	11,242	710	956	139

Note:

Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

Duplicates are more than one application received on the same day

Pending/Never Completed are applications with a cancel or send back status and not a duplicate

Denied are applications with an ineligible status and not a duplicate

Approved are applications with eligible status and not a duplicate

Provided is estimate of all applications received, internet, welcome kits, IVR, door-to-door marketing campaign target lists (AVM, email, bill inserts), and recertifications

2011 CARE Annual Report
 CARE Table 12 - CARE Expansion Program
 San Diego Gas & Electric Company

CARE Expansion Program						
2011	Participating Facilities by Month (Gas)			Participating Facilities by Month (Electric)		
	CARE Residential Facilities	CARE Commercial Facilities	Total	CARE Residential Facilities	CARE Commercial Facilities	Total
January	298	118	416	488	157	488
February	301	118	419	491	157	491
March	300	120	420	494	161	494
April	300	120	420	489	162	489
May	274	165	439	466	212	466
June	268	147	415	457	195	457
July	268	148	416	459	196	459
August	263	148	411	454	197	454
September	262	148	410	454	199	454
October	261	148	409	454	197	454
November	261	148	409	460	196	460
December	261	145	406	459	194	459

CARE Expansion Program		
Average Monthly Gas / Electric Usage ¹		
Customer	Gas Therms	Electric KWh
Residential Facilities	42	475
Commercial Facilities	394	7,608

¹ Excludes master meter usage.

CARE Expansion Program					
CARE Expansion Self-Certification and Self-Recertification Applications					
	Received	Approved	Denied	Pending/Never Completed	Duplicates
Total	9	9	0	0	0
Percentage		100%	0%	0%	0%

CARE Program Fund Shifting by Category 2011				
Program Year: 2011	Total Authorized	Total Shifted¹	% of Authorized Total	Shifted to/from?
CARE Budget Categories:	<i>ex.</i> \$x,xxx.xx	\$x,xxx	x%	To outreach
Outreach	\$ 1,734,261	\$ 83,513	2.7%	From IT/Programming
Processing, Certification, and Verification	\$ 230,015	\$ 23,689	0.8%	From IT/Programming
Information Tech./Programming	\$ 452,687	\$ (116,226)	-3.7%	To Outreach, Processing and M&E
Pilots	\$ -	\$ -	0.0%	
Measurement and Evaluation	\$ 4,326	\$ 9,024	0.3%	From IT/Programming
Regulatory Compliance	\$ 196,401	\$ -	0.0%	
General Administration	\$ 423,927	\$ -	0.0%	
CPUC Energy Division Staff	\$ 102,900	\$ -	0.0%	
Cooling Centers			0.0%	
Total Expenses	\$ 3,144,517	\$ -		
Subsidies and benefits	\$ 49,919,937			
Total Program Costs and Discounts	\$ 53,064,454			

1) Please report this number in standard accounting format, with negative amounts displayed in parentheses (\$xx,xxx.xx).