

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

Applications of Pacific Gas and Electric Company for Approval of the 2009-2011 Low Income Energy Efficiency and California Alternate Rates for Energy Programs and Budget (U39M)	Application 08-05-022 (Filed May 15, 2008)
Application of San Diego Gas & Electric Company (U 902 M) for Approval of Low Income Assistance Programs and Budgets for Program Years 2009 – 2011.	Application 08-05-024 (Filed May 15, 2008)
Application of Southern California Gas Company (U 904 G) for Approval of Low Income Assistance Programs and Budgets for Program Years 2009 – 2011.	Application 08-05-025 (Filed May 15, 2008)
Application of Southern California Edison Company (U 338-E) for Approval of Low Income Assistance Programs and Budgets for Program Years 2009, 2010 and 2011.	Application 08-05-026 (Filed May 15, 2008)

**ANNUAL REPORT ACTIVITY OF SAN DIEGO GAS & ELECTRIC COMPANY
(U 902 M) ON LOW INCOME ASSISTANCE PROGRAMS FOR 2009**

Kim F. Hassan

Attorney for
San Diego Gas & Electric Company
101 Ash Street, HQ12B
San Diego, CA 92101-3017
Telephone: (619) 699-5006
Facsimile: (619) 699-5027
E-Mail: KHassan@semprautilities.com

May 03, 2010

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

Applications of Pacific Gas and Electric Company for Approval of the 2009-2011 Low Income Energy Efficiency and California Alternate Rates for Energy Programs and Budget (U39M)	Application 08-05-022 (Filed May 15, 2008)
Application of San Diego Gas & Electric Company (U 902 M) for Approval of Low Income Assistance Programs and Budgets for Program Years 2009 – 2011.	Application 08-05-024 (Filed May 15, 2008)
Application of Southern California Gas Company (U 904 G) for Approval of Low Income Assistance Programs and Budgets for Program Years 2009 – 2011.	Application 08-05-025 (Filed May 15, 2008)
Application of Southern California Edison Company (U 338-E) for Approval of Low Income Assistance Programs and Budgets for Program Years 2009, 2010 and 2011.	Application 08-05-026 (Filed May 15, 2008)

**ANNUAL REPORT ACTIVITY OF SAN DIEGO GAS & ELECTRIC COMPANY
(U 902 M) ON LOW INCOME ASSISTANCE PROGRAMS FOR 2009**

This is the annual report of program year (PY) 2009. The purpose of this report is to consolidate activity for the CARE and LIEE programs and provide the Energy Division with all the necessary information to assist in analyzing the low-income programs.

This report presents program year 2009 LIEE and CARE results and expenditures for San Diego Gas & Electric Company (SDG&E).

Respectfully Submitted,

/s/ Kim F. Hassan

Kim F. Hassan

Attorney for
San Diego Gas & Electric Company
101 Ash Street, HQ 12B
San Diego, CA 92101-3017
Telephone: (619) 699-5006
Facsimile: (619) 699-5027
E-Mail: KHassan@semprautilities.com

TABLE OF CONTENTS

1. LIEE Executive Summary -	1
1.1. Alignment of LIEE with Strategic Plan Goals and Strategy.....	2
1.2. Low Income Energy Efficiency Program Overview–	8
1.3. Whole Neighborhood Approach Evaluation.....	10
1.4. LIEE Customer Enrollment Evaluation	14
1.5. Disability Enrollment Efforts.....	15
1.6. Leveraging Success Evaluation, Including LIHEAP	17
1.7. Integration Success Evaluation	19
1.8. Workforce Education & Training	21
1.9. Legislative Lighting Requirements Status	23
1.10. Studies.....	24
1.11. Pilots	27
1.12. “Add Back” Measures.....	29
2. CARE Executive Summary.....	30
2.1. Participant Information	30
2.2. CARE Program Summary.....	34
2.3. CARE Program Costs	36
2.4. Outreach.....	41
2.5. Processing Care Applications	57
2.6. Program Management.....	58
3. CARE Expansion Program.....	59
3.1. Participant Information	59
3.2. Usage Information	60
3.3. Program Costs.....	60
3.4. Outreach.....	60
3.5. Program Management.....	61
4. Fund Shifting.....	62
5. Appendix: LIEE Tables and CARE Tables	64

LOW INCOME ENERGY EFFICIENCY PROGRAM ANNUAL REPORT

1. LIEE Executive Summary –

Provide an executive summary of the LIEE program year:

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 Low Income Energy Efficiency (LIEE) programs 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.”¹

To achieve these objectives, the Commission adopted a programmatic LIEE 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.”²

In D.08-11-031, the Commission approved a LIEE program design and budget for San Diego Gas & Electric Company (SDG&E) to implement in program year (PY) 2009-2011 that was intended to achieve the Commission’s key policy objective of making LIEE a reliable energy resource and to accomplish the programmatic initiative of reaching 25% of all willing and eligible households during the 2009-2011 program cycle.

This report provides information on SDG&E’s LIEE program accomplishments and expenditures for PY2009. SDG&E’s LIEE program offers its low income customer’s weatherization services, energy efficient lighting, energy efficient appliances, energy education

¹ D.07-12-051 at page 25.

² *Id.*

and other services at no cost to qualified natural gas and electric customers within its service territory.

1.1. Alignment of LIEE with Strategic Plan Goals and Strategy

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

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

Implementation Plan and Timeline		
Strategies	Near Term 2009 – 2011	IOU strategy employed this program year
1.1: Strengthen LIEE 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. 	<p>In 2009, SDG&E utilized mass media, direct marketing and community outreach techniques to educate potentially eligible customers about assistance available through SDG&E.</p> <p>Mass media, such as radio, print, outdoor and online advertising, was used to increase awareness and interest in the programs offered by SDG&E. Specifically, SDG&E launched three campaigns in 2009.</p> <ul style="list-style-type: none"> The first campaign focused on educating customers about all the ways SDG&E provides assistance, particularly during times of economic hardship. SDG&E targeted low income English and Spanish speaking audiences with radio spots on English and Spanish stations, bus shelter posters in select neighborhoods and newspaper advertising in targeted community publications. All tactics were executed in both English and Spanish. The second and third campaigns were program-specific campaigns, one focusing on the LIEE

Implementation Plan and Timeline		
Strategies	Near Term 2009 – 2011	IOU strategy employed this program year
		<p>program and the other focusing on the California Alternate Rates for Energy (CARE) program. The goal of these two campaigns was to leverage the awareness created by the first campaign and drive qualified applicants to enroll in either one or both of the programs. SDG&E targeted low income English and Spanish speaking audiences with radio spots on English and Spanish stations and online advertising executed in both English and Spanish. Online display and rich media ads³ were placed on a number of English and Spanish websites, text ads were placed on Facebook and paid search ads⁴ ran on all of the major search engines. The online campaign was geographically targeted to SDG&E's entire service territory.</p> <p>SDG&E increased its direct marketing efforts; including direct mail, automated outbound calling, and door-to-door canvassing in order to directly reach more households with the LIEE message.</p> <p>Community outreach was conducted in order to leverage the resources of other organizations and agencies to enroll customers in the LIEE program. As an example, SDG&E worked with Community Based Organizations (CBOs) in order to leverage existing relationships with low income clients to extend LIEE program benefits as part of their total assistance offering. These organizations are often able to assist SDG&E in overcoming barriers to enrollment, such as language,</p>

³Rich media refers to online advertising that makes use of a range of interactive digital media such as streaming video and audio. The ads usually change as a user's mouse passes over. In essence, it means dynamic/interactive (versus something that is just static).

⁴ Paid search ads are online advertisements on web pages that show results from search engine queries. Search advertisements are targeted to match key search terms (called **keywords**) entered on search engines. The opportunity to present consumers with advertisements tailored to their immediate interests encourages consumers to click on search ads instead of unpaid search results, which are often less relevant. Unpaid search results are called organic results.

Implementation Plan and Timeline		
Strategies	Near Term 2009 – 2011	IOU strategy employed this program year
		<p>trust, and fear. Partnerships with other programs and outside organizations allow SDG&E to reach more potential customers.</p> <p>SDG&E is currently developing its corporate social marketing policy; therefore it is being used on a limited basis. SDG&E uses Twitter on a limited basis and has a Facebook page with limited content.</p> <p>In mid-2009, focus groups were conducted to gain insight on the barriers to enrollment. The information obtained from the focus groups proved to be valuable and SDG&E used this information to develop its 2010 marketing plan. In addition, SDG&E's customer communications are being modified based on the data obtained from this research.</p>
1.2: Develop a recognizable and trustworthy Brand/Tagline for the LIEE programs.	<ul style="list-style-type: none"> • Develop a statewide program name and description for LIEE which is coordinated with the ME&O efforts for energy efficiency, demand response and any other demand-side options. • Implement branding. 	SDG&E participated in meetings with the other investor-owned utilities (IOUs) ⁵ in the development of a single statewide Marketing, Education, and Outreach (ME&O) plan as part of the general Energy Efficiency (EE) proceeding. In late 2009, SDG&E began preparatory work for the January 2010 statewide LIEE branding project kick-off with Interbrand, an international branding consultant contracted to support the statewide effort.
1.3: Improve program delivery	<ul style="list-style-type: none"> • Use information from segmentation analysis to achieve efficiencies in program 	SDG&E used demographic data developed by the Claritas Group to segment its low income customer base and tailor its message to potential LIEE participants. Customers were also targeted geographically by neighborhood in order to improve efficiencies, reduce the carbon footprint of LIEE installation contractors by

⁵ The IOUs consist of SDG&E, Pacific Gas and Electric Company (PG&E), Southern California Edison Company (SCE), and Southern California Gas Company (SoCalGas).

Implementation Plan and Timeline		
Strategies	Near Term 2009 – 2011	IOU strategy employed this program year
	<p>delivery.</p> <ul style="list-style-type: none"> • Leverage with Local, State, and Federal agencies as well as other organizations to increase seamless coordination, efficiency and enrollment 	<p>reducing their drive time, and to take advantage of targeted community outreach with CBOs.</p> <p>SDG&E also entered into agreements with the three Low Income Home Energy Assistance Program (LIHEAP), agencies serving customers within SDG&E's service territory and partnered with local government to leverage the resources of these agencies and to increase awareness and participation in the LIEE program.</p>
<p>1.4: Promote the growth of a trained LIEE workforce.</p>	<ul style="list-style-type: none"> • Incorporate LIEE training needs into the Workforce Training needs assessment. • Develop Training Roadmap which includes funding requirements and sources other than IOUs. • Implement LIEE workforce education and training. 	<p>In 2009, SDG&E met with the San Diego Community College District and Cuyamaca College to discuss development of a training curriculum for students interested in weatherization training.</p> <p>These colleges have not indicated whether they plan to develop training programs for students interested in weatherization training.</p>

**1.1.2. Please identify the IOU strategies employed in meeting
Goal 2: LIEE is an Energy Resource**

Implementation Plan and Timeline		
Strategies	Near Term 2009 – 2011	IOU strategy employed this program year
<p>2.1: Increase collaboration and leveraging of other low income</p>	<ul style="list-style-type: none"> • Identify key areas where data sharing would be possible and advantageous. • Develop 	<p>SDG&E identified key agencies with which data sharing opportunities could be successful and efficient in promoting the LIEE program within the low income community. However, confidentiality</p>

Implementation Plan and Timeline		
Strategies	Near Term 2009 – 2011	IOU strategy employed this program year
<p>programs and services</p>	<p>partnerships with community organizations and other agencies to leverage resources available from local governments, federal, state, and private project funding sources.</p>	<p>concerns associated with data sharing prevented SDG&E from utilizing this approach for the enrollment of customers in SDG&E’s LIEE program.</p> <p>SDG&E leveraged with three LIEE contractors that provide LIHEAP services in addition to LIEE program services. These contractors included, Community Action Partnership of Orange County (CAPOC), Campesinos Unidos Incorporated (CUI) and Metropolitan Area Advisory Council (MAAC). CAPOC was a new addition in 2009. By leveraging the resources of these three contractors, SDG&E was able to seamlessly offer customers measures from both LIEE and LIHEAP programs. This benefitted both the customer and the programs by stretching measure dollars and by providing the customer with the opportunity to receive the most measures possible.</p>
<p>2.2: Coordinate and communicate between LIEE, energy efficiency and DSM programs to achieve service offerings that are seamless for the customer.</p>	<ul style="list-style-type: none"> • Ensure LIEE participants are aware of energy efficiency and DSM/EE programs. • Coordinate with CSI programs to provide LIEE program services in qualified low income housing for both single family and multi-family CSI programs. • Coordinate AMI delivery and LIEE Programs 	<p>SDG&E cross promoted LIEE, EE and Demand Response programs where feasible in 2009. SDG&E worked with Synergy, a contractor under SDG&E’s general energy efficiency program, to provide mobile home customers with all possible EE measures from both the LIEE program and SDG&E’s third party mobile home program. SDG&E also cross promoted the EE rebate program with assistance programs through the use of special letterhead that displays information about multiple SDG&E programs. This letterhead was used for all correspondence and direct mail sent on behalf of the LIEE program.</p> <p>SDG&E cross promoted the Demand Response program with the LIEE program by incorporating the Demand Response program information in the educational component of the LIEE program.</p> <p>SDG&E worked closely with Grid Alternatives to enroll California Solar Initiative (CSI) program applicants in the LIEE program. Grid Alternatives</p>

Implementation Plan and Timeline		
Strategies	Near Term 2009 – 2011	IOU strategy employed this program year
		<p>is a non-profit organization responsible for implementing the low income component of the CSI called the Single-Family Affordable Solar Home (SASH) program.</p> <p>The Advanced Metering Infrastructure (AMI) was rolled out in the SDG&E service territory in 2009. All low income customers received information about the AMI prior to the installation of SDG&E smart meters. While SDG&E was educating its customers about AMI, it also cross-promoted the LIEE program. LIEE program collateral was distributed and discussed one-on-one with customers at AMI events and door-to-door exchanges.</p>
<p>2.3: Provide low income customers with measures that result in the most savings in the LIEE program</p>	<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. 	<p>SDG&E's LIEE program provides energy savings, helps customers reduce their energy bills, and improves the customer's quality of life. This is accomplished through the mix of measures offered in SDG&E's LIEE program, the installation of those measures and by providing customers with energy education. The education component of the LIEE program helps customers recognize wasteful behaviors and adopt new practices that can help reduce their gas and electric bills. Through the practice of conservation and the installation of measures, such as compact florescent lamps (CFLs) and light-emitting diode (LED) nightlights, bills can be reduced and in turn it can improve the customer's quality of life.</p> <p>The energy savings delivered from SDG&E's LIEE program is consistent with Commission-adopted California Long-Term Energy Efficiency Strategic Plan that "the LIEE program must evolve into a resource program that garners significant energy savings in our state while providing an improved</p>

Implementation Plan and Timeline		
Strategies	Near Term 2009 – 2011	IOU strategy employed this program year
		<p>quality of life for California’s low income population.”⁶</p> <p>SDG&E’s LIEE program provides cost effective measures, such as refrigerators, air conditioner tune ups, duct sealing, and energy efficient lighting that are measurable and provide sustainable savings. The measures offered through SDG&E’s LIEE program will deliver long term measure lifecycle energy savings.</p>
<p>2.4: Increase delivery of efficiency programs by identifying segmented concentrations of customers.</p>	<ul style="list-style-type: none"> • Identify and develop segmented approach to deliver services to households • Improve use of CBOs in delivering services. 	<p>As indicated above, SDG&E used demographic data to segment its low income customer base and tailor its message to potential LIEE program participants. Potentially eligible customers were also targeted geographically by neighborhood in order to improve efficiencies and reduce the carbon footprint of LIEE installation contractors by reducing their drive time in the delivery of services and measures.</p> <p>SDG&E improved its delivery of LIEE program services and measures by expanding its community outreach through partnerships with CBOs in its service territory.</p>

1.2. Low Income Energy Efficiency Program Overview–

SDG&E’s LIEE program is designed to primarily achieve energy savings by serving as a resource to the State of California and by reducing low income customers’ energy bills. SDG&E’s

⁶ D.08-11-031 at page 2.

LIEE program serves all eligible low income customers by providing, at no cost, all feasible LIEE measures as determined by the Commission and implemented through SDG&E's outreach, assessment and installation process.

During PY2009, SDG&E's LIEE program treated⁷ a total of 20,924 homes and weatherized⁸ 16,288 homes. As part of its comprehensive services to eligible LIEE participants, SDG&E provided in-home energy education to 20,774 customers; installed 2,321 energy efficient refrigerators; 15,400 envelope and air sealing measures; 16,236 water heater conservation measures; 1,725 furnace repair or replacements; 186 furnace standing pilot change-outs; cleaned and tuned 9,566 furnaces; 3,545 thermostatic shower valve; 265 microwaves; 408 room air conditioner replacements; conducted 457 duct tests; 111,014 CFLs; 11,934 interior hard-wired CFL fixtures; and 28,720 LED night lights. See LIEE Table 2 for a comprehensive listing of all of the measures installed through SDG&E's LIEE program in 2009.

Weatherization and appliance installations resulted in first year energy savings of 6,489,099 kilowatt hours (kWh) and 283,161 therms as shown in Section 1.2.1. below. The energy savings achieved through the 2009 LIEE program will contribute to the Commission's energy savings goals adopted for program year 2006 and beyond as set forth in D.04-09-060.⁹ The average per home lifecycle bill savings for the 2009 LIEE program was \$435.

SDG&E will be filing a petition for modification (PFM) to request the inclusion of certain measures that were inadvertently omitted from SDG&E's Application for its 2009–2011 LIEE program cycle. Specifically, SDG&E inadvertently omitted measures available for certain climate zones and/or dwelling type. Installation of these measures should be allowed because they are consistent with the Commission's 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.”*¹⁰

⁷ Per D.02-12-019, the Commission defines a “treated” home as an income-qualified home that has received any measure or service under the LIEE program, including energy education, compact fluorescent lamps, weatherization and appliances. Under the LIEE program, a treated home must receive all feasible measures for which it qualifies.

⁸ Per D.02-12-019, the Commission defines a “weatherized” home as a subset of treated homes, and are defined as income-qualified homes that have received any weatherization measures (e.g., weatherstripping and caulking) under the LIEE program.

⁹ Findings of Fact 13.

¹⁰ D.07-12-051, p.2.

Consistent with the cost-effective methodologies adopted in D.08-11-031, SDG&E conducted cost effectiveness tests for those measures that were inadvertently omitted and the results showed that a significant number of the measures passed the cost effectiveness test threshold of 0.25 benefit/cost ratio for measure installation. During 2009, SDG&E installed all feasible measures in eligible customers' homes as reflected in Attachment F2 of D.08-11-031, including those measures in certain climate zones and/or dwelling type that were inadvertently omitted.

In its PFM, SDG&E will request to receive adequate credit for the measure installations, and any energy savings and expenditures associated with the measures because eligible customers received the benefits of the LIEE program and the energy savings contributed to the Commission's energy savings goal adopted by D.04-09-060. Those expenditures and energy savings have been reflected in Section 1.2.1., the summary table below.

1.2.1. Provide a summary of the LIEE Program elements as approved in Decision 08-11-031:

Program Summary			
	Authorized / Planning Assumptions	Actual	%
Budget	\$21,184,008	\$16,220,000	77%
Homes Treated	20,384	20,924	103%
kWh Saved	8,887,914	6,489,099	73%
kW Demand Reduced	2,010	1,265	63%
Therms Saved	478,745	283,161	59%

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 utilized demographic data provide by the Claritas Group as the foundation for its geographic segmentation strategy used for the Whole Neighborhood Approach (WNA). In the demographic data, SDG&E's service territory is initially segmented according to zip codes (which

can determine neighborhoods) and further segmented by a residential customer profile. This segmentation allows for targeted messaging and preferred channels to be utilized in driving 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 to optimize resources and reinforce the message. The WNA is one tool utilized by SDG&E to contribute to the delivery of LIEE measures to eligible low income households.

- 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 identified in the KEMA Report¹¹ and adopted by the Commission in D.08-11-031 (which include households with high energy usage, energy burden and energy insecurity) to identify potential WNA neighborhoods and it delivered targeted outreach in an effort to increase enrollment in these segments. SDG&E addressed each of these household types with a tailored approach. For example, the majority of eligible LIEE 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 these customers. Therefore, SDG&E incorporated a message about making their home more secure and comfortable as a way to gain interest in the program. For households with a high energy burden, saving money on their SDG&E bill is a larger concern and was therefore highlighted in communications to them. For the households with high energy insecurity (customers with late payments and/or threatened service shut-off), SDG&E developed a direct mail campaign targeted to customers who had paid their bills at a bill payment office for three consecutive months and had received a collections notice. Since it is difficult to segment each of these specific groups by neighborhood, they became a subset of SDG&E’s WNA efforts. If

¹¹ Phase II Low Income Needs Assessment Final Report prepared by KEMA, Inc, dated October 12, 2007.

SDG&E was targeting a specific neighborhood with a large concentration of households meeting one or more of the “most promising” characteristics, the outreach campaigns would be linked.

The idea to use messaging that speaks to comfort and security, as mentioned above, came out of research that was conducted in early 2009. SDG&E conducted focus groups to aid in determining how to overcome the barrier of customer refusals. As a result, SDG&E identified themes and messaging that resonate well with low income customers. As part of this study, focus group participants were asked what their priorities were in life, in other words, what they hold dear or what is most important to them. The results indicated that the terms “faith,” “family,” “health,” and “home” were of the utmost importance in regard to security, happiness and peace in the lives of low income customers. “Faith” provides them with the fundamentals of security and peace, which are not impacted by the pressures of the outside world. Hard times enhance their need to rely on a higher power. “Family” is important as they must be provided for. With many having suffered layoffs and pay cuts, there is tremendous concern about how to become and remain employed. “Health” and wellness are critical as there is a need to remain healthy in order to be able to focus on and accomplish all that is important in their lives. And “Home” is seen as one’s sanctuary, safe from the pressures of the outside world. It is in this safe haven where family, in particular their children, are a key focus. Home is where everyone regroups and supports one another in the struggle to maintain or survive. As a result of this customer input, SDG&E has modified its communications to address these values and embrace these more emotional connections with its customers.

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’s current program delivery strategy differs from previous years, specifically in the areas of identification and outreach, enrollment, assessment and inspection. Measure installation has not changed from previous years. The following provides detail regarding the changes that have occurred in these specific areas:

Identification and outreach - SDG&E realized that the pool of potentially eligible customers may have changed due to the effects of the recent downturn in the economy and

customers who may have not been eligible for LIEE in previous years may now be eligible. For example, customers who had never needed to utilize social services or low income programs before, now needed assistance. SDG&E increased its visibility and generated program awareness through mass media campaigns, special messaging on its website and outreach to the newly unemployed through the San Diego Workforce Partnership, Inc (Workforce Partnership). The Workforce Partnership funds job training programs to meet the region's demand for qualified workers. The programs benefit local employers, unemployed and recently laid-off adults, and at risk youth ages 14 to 21. In addition, the Workforce Partnership invests significant time and resources in studying and analyzing the local economy in San Diego. The Workforce Partnership has been in operation since 1974, when a Joint Powers Agreement was executed between the City and the County of San Diego which is a nonprofit public benefit corporation.

Enrollment- In an effort to make the enrollment process more streamlined and less cumbersome for customers, SDG&E implemented several additional categorical eligibility programs (National School Lunch program, Bureau of Indian Affairs General Assistance and Head Start Income Eligible – Tribal Only) as authorized in D.08-11-031 and also added a direct connect feature to automated outbound calling, allowing more efficient screening and scheduling from one quick call.

Assessment – SDG&E's outreach and assessment contractor, Richard Heath and Associates (RHA), has conducted ongoing training for their Energy Specialists on any new program policies and procedural changes. With the introduction of new measures in 2009 such as microwaves, thermostatic shower valves and LED nightlights, 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 the benefits of installing these additional measures to customers. SDG&E Field Specialists were made available to the RHA Energy Specialists to assist them in determining the feasibility of measures. This change helped manage the customer experience and set appropriate expectations.

Inspections – SDG&E, in 2009, continued its practice of inspecting LIEE customer measure installations, in accordance with the statewide LIEE Policy and Procedures manual as adopted by the Commission.

1.4. LIEE 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 LIEE program.

SDG&E aggressively pursued new enrollments for the LIEE Program through its outreach and marketing efforts. In 2009, SDG&E enrolled 20,924 total customers in the LIEE Program. Of that total, 1,582 (7.5%) LIEE program enrollments were go-backs. This was a result of either new measure availability or the installation of qualified go-back measures, such as refrigerator replacement.

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

SDG&E focused its new efforts on expanding the use of targeted self certification and categorical enrollment thereby minimizing the impact to customers in providing income documentation for program eligibility. In 2009, SDG&E enrolled 14,158 LIEE customers through targeted self certification and 3,493 customers through categorical enrollment.¹² This was achieved by refocusing direct marketing efforts, such as direct mail, automated outbound calling and door-to-door canvassing, to those customers.

- 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.

In 2009, SDG&E exceeded its goal by treating 20,924 eligible low income households which represents 103% of its LIEE program goal.

¹² Targeted self certification authorized in D.06-08-025.

1.5. Disability Enrollment Efforts

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

SDG&E introduced a number of initiatives in 2009 to increase LIEE enrollment within the disabled community, including: 1) partnering with various CBOs that assist disabled clients, 2) outreaching to Medical Baseline customers, and 3) engaging in collaborative efforts with Deaf Community Services to provide certified sign-language interpreters to assist hearing-impaired customers.

SDG&E also established a new effort to promote CARE with the Deaf and Disabled Telecommunications Program (DDTP)¹³ via paper applications. Paper applications for CARE were completed at outreach events staffed by DDTP throughout San Diego County and Orange County. Additionally, bill inserts were being developed for CTAP customers. Once these customers are enrolled in the CARE program, they are targeted for participation in the LIEE program.

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

SDG&E has reached out to the disabled community through relationships with the following groups: 211 San Diego, Access to Independence, Alternative Healing Network, Blind Institute San Diego, Deaf & Disabled Telecommunications Program/California Telephone Access Program, Deaf Community Services of San Diego, The Burn Institute San Diego, Disabled Veterans San Diego, Elder Help of San Diego, Rebuilding Together San Diego, ResponseLink of San Diego, Rady's Children's Hospital and Senior Community Centers of San Diego. Through collaborative efforts with these organizations, SDG&E was able to identify gaps in the deliverables for ME&O to the disabled community. SDG&E will implement the following

¹³ The DDTP is a public program mandated by the California State legislature and administered by the CPUC. The DDTP has two components: the California Relay Service, which includes Speech to Speech and the California Telephone Access Program (CTAP), which provides assistive telecommunications equipment. Their purpose is to provide access to basic telephone service for Californians who have difficulty using the telephone.

changes to increase program awareness and enrollment in the disabled community: 1) coordinate outreach with agencies, 2) select sponsorships of agency events and programs, 3) utilize cautious and compassionate efforts to identify disabled customers, and 4) implement an LED night light program for the elderly and disabled to improve lighting, so as to help alleviate falls. Beginning in 2010, SDG&E will also contract with agencies serving limited-English proficient clients, the disabled, and seniors. SDG&E filed Advice Letter 2140-E/1922-G requesting Commission authorization to pay a capitation fee for referrals which lead to enrollments in the LIEE program. The Commission granted this request in Commission Disposition Letter, dated March 4, 2010.

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

Disability Enrollments			
Source	Enrollments	Disability Enrollments	% of Disability Enrollments
Canvassing	12,249	347	3%
CARE & Medical Baseline Leveraging	290	17	6%
Community Based Organizations	226	4	2%
County Housing Authority	42	2	5%
Direct Mail Letter	2,970	138	5%
Neighbor/Friend/Relative/Other Referral	2,045	81	4%
Newspaper/Radio/Television Media Event	83	2	2%
Outbound Calling	1,301	93	7%
SDG&E Call Center	1,030	47	5%
SDG&E Community Outreach	211	6	3%
SDG&E Web	391	12	3%
SDGE Bill	50	0	0%
SDGE Gas Service Tech	36	4	11%
Total	20,924	753	4%
Target Enrollments 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 failed to meet the 15% goal because SDG&E currently does not have the capability to determine which of its customers are disabled, unless the customer self-identifies as disabled. Moreover, when enrolling customers in LIEE, D.08- 11-038 expressly forbids the utilities from asking customers if they are disabled. In order to better identify and communicate with their disabled customers, the Joint Utilities will soon file a petition to modify D.08-11-038, in which Disability Rights Advocates (“DisabRA”) will support the Joint Utilities’ efforts to obtain Commission authority to modify written applications and other documents that will allow customers to selfidentify as disabled. In addition, SDG&E attempted to work with agencies serving the disabled to try to obtain mailing and contact lists, but was denied access due to confidentiality concerns.

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:

- *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 LIEE program with other related low income program offered outside the IOU that serve low income customers.

SDG&E worked with three LIEE contractors that provide LIHEAP services in addition to LIEE program services. These contractors included, CAPOC, CUI, and MAAC. CAPOC was a new addition in 2009.

By leveraging the resources of these three contractors, SDG&E was able to seamlessly offer customers measures from both LIEE and LIHEAP programs. This benefitted both customers

and the programs, as it stretched measure dollars and, provided customers with the opportunity to receive the most measures available.

The following steps were taken in order to make this leveraging opportunity possible:

- Held exploratory meetings with LIHEAP agencies (MAAC, CUI, and CAPOC) to discuss leveraging opportunities and implementation.
- Entered into a fee negotiation and an agreement to track all leveraged jobs in SDG&E's database.
- Modified SDG&E database to support leveraging efforts.
- Trained LIHEAP agencies on how to record leveraged jobs in SDG&E's database.
- Amended LIHEAP contracts to include leveraging component.

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.

There were other benefits resulting from the LIHEAP leveraging efforts that are not captured under the three criteria described above. The primary benefit of the leveraging is that customers received better overall service because they were able to simultaneously participate in both programs in a manner that was seamless to the customer. An additional benefit is that once customers are enrolled in one program they are automatically enrolled in the other program, without having additional visits to their home or having to produce additional income documentation. This also benefits the environment because fewer service visits translates into a decrease in carbon footprints, and the overall effect on the environment. In addition, customers are receiving all feasible measures from both programs without having to contact both programs separately, thereby improving the level of service offered to customers.

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?

Unfortunately, SDG&E was unsuccessful in creating any leveraging opportunities with CSD during 2009. However, SDG&E hopes to join with the other IOUs to seek leveraging opportunities with CSD during the remainder of the 2009-2011 LIEE program cycle.

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 LIEE program with the CARE Program.

SDG&E integrates CARE program and LIEE program messaging and shares data between these two programs whenever possible. In 2009, SDG&E ensured that each program was cross-promoted throughout all marketing tactics, including mass media, direct marketing and community outreach. For example, SDG&E ran an awareness campaign in 2009 that promoted both CARE and LIEE programs. Direct mail sent out on behalf of each program cross promoted the other. In addition, all newly enrolled CARE customers were notified about LIEE and were encouraged to enroll in the program if their home had not already received LIEE services.

In 2009, SDG&E worked with the City of San Diego and the San Diego Urban League to promote the statewide WE CARE campaign through an event in San Diego. Thousands of San Diego residents attended this event and were provided information on SDG&E's customer assistance programs which include LIEE, CARE, Medical Baseline, and FERA programs. CARE applications were completed and information on the LIEE program was presented as well as the other aforementioned programs.

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

SDG&E's Residential Energy Efficiency group promotes the LIEE program at its Lighting Exchange Events. The Lighting Exchange Program participates in a myriad of local community

events annually to promote CFL technology. Customers bring their incandescent bulbs or torchiere lamps to the event and receive energy efficient CFLs in exchange. The thousands of customers who attend these events annually are provided information on SDG&E's low income programs.

SDG&E's LIEE program and its Residential Energy Efficiency program have joined forces to work with Synergy to provide all possible services from each program to customers living in mobile homes. Synergy has a contract with SDG&E's 3rd Party EE Program providing limited measures to mobile homes. If a customer is income eligible for the LIEE program, Synergy will install all feasible measures offered through the LIEE program applicable to mobile home dwellings. This ensures that the customer receives all feasible measures offered by both programs.

SDG&E worked with RHA to leverage its 3rd Party EE Thermostat Replacement program implemented in homes with electric resistant ceiling heat. When a single-family or multi-family complex was served by the Thermostat Replacement program, additional LIEE program services were provided by RHA where feasible. This ensured qualified customers benefitted from the measures provide by both programs.

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

In 2009, SDG&E continued to work with the Local Government Partnership Programs by supporting their lunch and learn sessions which bring representatives from local area governments together with SDG&E program managers. SDG&E program managers provided an overview of its low income programs and addressed questions from the audience. SDG&E provided program literature and applications to attendees so that these government agencies could provide this information to their clients. SDG&E continues to work with the County of San Diego through the Government Partnership Program to identify different ways to integrate customer outreach and marketing. One example is the loan program that the County of San Diego offers low income customers who have home improvement needs. The County of San Diego will provide SDG&E with the customers' contact information so that SDG&E can contact the customer for participation in the CARE and LIEE programs.

- 1.7.4.** Describe the new efforts in program year to integrate and coordinate the LIEE program with any additional Energy Efficiency Programs.

SDG&E's new efforts to integrate LIEE and EE programs have been addressed in Section 1.7.2 and 1.7.3 above.

- 1.7.5.** Describe the new efforts in program year to integrate and coordinate the LIEE program with the Demand Response Programs.

SDG&E's new effort to integrate LIEE and Demand Response programs include identifying residential customers with central air conditioner units through the LIEE program. These residential customers are provided information on SDG&E's Summer Saver Program through the In-Home Energy Education component of the LIEE program.

- 1.7.6.** Describe the new efforts in program year to integrate and coordinate the LIEE program with the California Solar Initiative Programs.

SDG&E's new efforts to integrate the LIEE program with the CSI programs included SDG&E working closely with Grid Alternatives to facilitate enrollment of customers in the Single-family Affordable Solar Houses (SASH) CSI Program. All leads sent by Grid Alternatives are screened for CARE enrollment and LIEE participation. Income eligible customers are first enrolled in the CARE program and then expedited through the LIEE Program. SDG&E has also worked with California Center for Sustainable Energy (CCSE) to promote the Multi-family Affordable Solar Homes (MASH) program in the affordable housing and multi-family segments. SDG&E continues to work with Grid Alternatives and CCSE to help identify opportunities for low income customers to be included in the programs under the CSI.

1.8. Workforce Education & Training

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

In prior years, SDG&E contractors hired and trained individuals from the low income communities; however, SDG&E did not specifically have a role in training for the LIEE program. In 2009, SDG&E had discussions with both San Diego Community College District and Cuyamaca College, regarding the development of a training curriculum for students interested in weatherization training. In both instances, the institutions were looking at the American Recovery and Reinvestment Act (ARRA) as a funding source. However, SDG&E expressed to both institutions that, while it believed in training young people for future opportunities, there were not enough potential jobs in these fields to justify developing the curriculum dedicated solely to weatherization.

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

SDG&E does not conduct any formal training for its LIEE program other than refresher training, periodic policy and procedure updates and any training related to new measures that is deemed appropriate. All day-to-day and trade specific training is the responsibility of each individual contractor. However, SDG&E conducted various recruitment efforts on such platforms as Monster.com which manages ethnic specific job boards. SDG&E also targets recruitment events in a variety of diverse ethnic groups through colleges, community job fairs, and high schools.

In addition, SDG&E's outreach and assessment, weatherization, and HVAC contractors hire qualified installers and technicians from communities served by the LIEE program.

Type of training or recruitment conducted	Employees Trained	Employees Hired
Outreach & Assessment contractor		
Energy Team Outreach Specialist	10	7
Energy Team Outreach Installer	10	2
Energy Team Clerks	4	2
Weatherization		
Basic weatherization, renovation training, windows, attic insulation, CVA training, door repair and installation, basic electrical, venting	19	16
HVAC		
Hired experienced HVAC technicians	0	2

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.

In 2009, SDG&E has monitored the supply of CFLs and SDG&E does not anticipate a shortage in the supply of CFLs. Additionally, SDG&E's outreach and weatherization contractors have indicated that they are not aware of any current or future CFL supply issues. Therefore, SDG&E does not anticipate that contractors will have any issues procuring CFLs in the near future for installation in SDG&E's LIEE program.

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

As part of the in-home energy education component of the LIEE program, the RHA Energy Specialists discuss the safe disposal and recycling of CFLs with customers and provide a leave-behind flyer for future reference by the customer.

- 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 did not procure CFLs for installation under the 2009 LIEE program. SDG&E's LIEE program contractors had their own contractual arrangements with their suppliers for CFL inventory for direct installations. Each contractor enters into a separate contract with a supplier to purchase and have CFLs delivered directly to the contractors designated delivery point. Warehousing is done at the contractor's site and they are responsible for managing their inventory in order to meet program supply and demand for CFLs. However for the 2010-2011 LIEE program cycle, SDG&E, SCE and PG&E jointly pursued and executed an agreement to procure and transport CFLs beginning in the first quarter of 2010. SCE is the administrator for the Joint IOUs.

- 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 LIEE program.

In anticipation of compliance with Assembly Bill (AB) 1109 in 2010, SDG&E introduced LED Night Lights into the LIEE Program in 2009.¹⁴ This allows customers to become more familiar with this technology as the market continues to develop more application for LED's at a more competitive price. Additionally, SDG&E's LIEE and Residential Energy Efficiency program staff are monitoring the development of LED lamps as a potential CFL replacement technology. However, at this time the price point of LED lamps relative to total energy savings realized, is not sufficient to be considered as an alternative for the LIEE 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;

¹⁴ In 2007, California adopted its own standard for general purpose lighting in AB 1109 which requires, among other things, that the California Energy Commission to adopt regulations that will reduce the average indoor residential lighting consumption by 50% and average indoor commercial and outdoor lighting levels by 25% relative to 2007 levels by 2018.

and 3) the activities anticipated in the next quarter and the next year.

2009 Impact Evaluation Study

The 2009 Impact Evaluation is a statewide study managed by the Commission's Energy Division staff. SCE is the contract administrator for the project. The objective of the Impact Evaluation research is to provide electric and natural gas savings estimates by measure, utility, dwelling type, climate zone, and other relevant dimensions of the PY2009 LIEE Program. It is anticipated that the results will provide data to quantify the PY2009 program achievements and document the relative value of various measures in producing energy savings.

As of the end of 2009, the following activities had taken place: A Request for Proposals (RFP) was prepared and approved by the Joint Utilities, (SDG&E, SoCalGas, SCE and PG&E) and Energy Division in June 2009; the RFP was distributed in July 2009; EcoNorthwest was selected as the contractor for the project in August 2009. EcoNorthwest is working with several sub-contractors, one of which includes the contractor that conducted the PY2005 LIEE Impact Evaluation. A project kick-off meeting was held in September 2009. The research plan was presented at an initial public workshop held in November 2009. The Joint Utilities provided customer data to the contractor in December 2009 and January 2010. A sample plan was finalized for the survey data collection effort (one component of the project) in January 2010. An initial draft of the participant survey instrument was circulated in March 2010.

During the second quarter of 2010, the Joint Utilities anticipate that survey data will be collected for LIEE participants and non-participants, on-site audits will be conducted, and some initial billing analyses will be completed. The engineering analyses of selected measures and additional billing analyses on all of the measures will be conducted during the third quarter. The Joint Utilities anticipate remaining on schedule to receive the final report on the project in December of 2010.

Joint Utility 2009 LIEE Non-Energy Benefits Study

The Non-Energy Benefits (NEBs) Study is a statewide study managed by SDG&E. The Study is designed to be conducted in two phases. The first phase, currently underway, seeks to provide a literature review describing the use of NEBs throughout the energy industry and to recommend an approach for updating the estimation of NEBs and incorporating them into the

required cost effectiveness tests for the LIEE Program. The second phase of the study, expected to start in 2010, will provide updated calculations for estimating the NEBs used in the LIEE Program.

To date, the following activities have taken place: a RFP for Phase I of the Study was written and approved by the participating utilities and the Energy Division in June 2009, and the RFP was then distributed the same month. In July 2009, Skumatz Economic Research Associates (SERA), located in Boulder, Colorado, was selected as the contractor for the project, and SERA's subcontractor on the project is The Cadmus Group, located in Portland, Oregon. A project kick-off meeting was held in San Diego in August 2009. A subsequent follow-up meeting was held in San Francisco in October 2009, and the project tasks and schedule were finalized later that month. A draft literature review was presented in December 2009.

During the first quarter of 2010, the Joint Utilities anticipate finalizing the deliverable that includes the literature review and recommendations for Phase 2. Once finalized, a public workshop will be scheduled to present the results. During the second quarter of 2010, the Joint Utilities anticipate finalizing the Phase 1 report and developing the work scope for Phase 2.

Process Evaluation

The 2009 LIEE Process Evaluation Study is a statewide study managed by PG&E. The Process Evaluation will assess the effectiveness of the current LIEE program and develop recommendations for program design and delivery that will improve the effectiveness of the program. The primary deliverable is a final report that will present the findings and recommendations for possible program changes; however, the Joint Utilities are also seeking usable information and recommendations as the evaluation progresses, so that LIEE program managers can get timely feedback.

The 2009-2011 LIEE program includes several new components, such as the whole neighborhood approach and a statewide ME&O awareness campaign. The 2009 Process Evaluation will give the Joint Utilities and the Commission a first opportunity to understand how these new approaches are impacting key Commission and utility program objectives, so that program elements can be fine-tuned to increase program participation and effectiveness.

In the first quarter of 2010, a RFP will be sent out for the LIEE Process Evaluation Study. After the successful bidder has been selected, the study is scheduled to begin in the second quarter

2010. The Final Report will be completed by January 2011, and this study will provide results that will be used to develop the 2012-2014 LIEE Program Applications.

Joint Electric Utility Refrigerator Degradation Study

The Refrigerator Degradation Study is a statewide study managed by PG&E. Typically an appliance replacement is based on the effective useful life (EUL) and degradation of the measure. The EUL and degradation determines at what stage of the measures lifecycle it becomes cost-effective to replace the measure to receive the most energy savings benefits. Currently, refrigerators are eligible for replacement with a new energy efficient refrigerator in the LIEE program if they are manufactured before 1993. LIEE program statistics indicate that the pre-1993 refrigerator replacement market is already saturated; however, the Joint Utilities believe energy efficient refrigerators are still one of the most cost effective, energy-saving measures in the LIEE program. This study will update refrigerator replacement criteria to garner new, significant and cost effective energy savings for the LIEE program.

The main objective of the Refrigerator Degradation study is to determine which, if any, alternate refrigerator replacement criteria will lead to maximum, cost effective energy and demand savings for the LIEE program. Specifically, the Joint Utilities are looking for a criterion for refrigerator replacement in the form of either a date at which manufacturer and technological changes in efficiency occurred, or a determined age of refrigerators to be replaced. This Study is scheduled to begin in 2010 and is expected to be completed during the third quarter 2010.

- 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.

None of the studies discussed above were completed by year-end 2009.

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).

In-Home Display (IHD) Pilot

SDG&E started the IHD pilot in the third quarter of 2009 with an assessment of the technology and proof of concept to select a potential IHD vendor for the pilot. One IHD vendor was selected to test the concept and a pre-pilot was implemented with 19 low income participants who met the technology criteria for participation.¹⁵ The pre-pilot was used to test customer recruitment, barriers to participation, customer experience with technology function, and customer behavioral changes. Activities for the pre-pilot will be wrapped up in January 2010. Thereafter, the full pilot will be conducted in 2010 with best practices obtained from the results and experiences of the pre-pilot. The full pilot in 2010 will consist of installing a total of 300 IHDs among 4 control groups as suggested in Resolution E-4237. These control groups are the following:

1. “control group” - customers with similar demographics and energy use, but no IHDs provided
(150 customers with no IHDs)
2. “device only group” - receive IHDs but no additional program materials and information (150 customers with IHDs)
3. “information only” – no IHDs provided but receive program materials and information (150 customers with no IHDs)
4. “device and information” – receive IHDs and program materials and information (150 customers with IHDs)

These control groups will be set up in 2010 with IHDs and with customer support to ensure these devices are working properly throughout 2010. Data collection and analysis will take place in the first quarter of 2011 before submitting a final report by June of 2011.

- 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,

¹⁵ The screening criteria used for customer participation to test the device and technology concept were the following: (1) Energy usage of 500 kWh/month average over a 12-month period; (2) Internet connection with an available Ethernet port; (3) Single family home; (4) Not on Medical Baseline; (5) Previously enrolled in LIEE program.

increased customer enrollments or enhanced program energy savings); and 5) Recommendations.

The In-Home Display pilot was not completed by year-end 2009.

1.12. “Add Back” Measures

SDG&E evaluated several measures for add back in 2009. The determination was made that these measures even though not meeting cost-effectiveness thresholds were important to customer’s health, comfort and safety. These measures were then installed as an add back and tracked accordingly. In 2009, the add back measures were delivered to 8% of the total homes served by the LIEE Program. See LIEE Table 18 for the add back measures included in SDG&E’s 2009 LIEE program.

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 LIEE measures, how does the IOU propose to address the shortfall in other parts of the LIEE program?

In 2009, SDG&E’s add back measures resulted in costs of approximately 8% of the LIEE 2009 program expenditures. These add back measures will not compromise SDG&E’s ability to meet the Commission’s goal that all eligible and willing customers will receive all cost effective LIEE 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.

Residential CARE Program Electric Customers by Month		
PY2009	Total CARE Participants	Percentage Change
January	241,826	-
February	243,196	0.6%
March	246,036	1.2%
April	248,857	1.1%
May	252,027	1.3%
June	253,223	0.5%
July	255,896	1.1%
August	257,948	0.8%
September	260,935	1.2%
October	265,384	1.7%
November	267,518	0.8%
December	269,517	0.7%

Residential CARE Program Gas Customers by Month		
PY2009	Total CARE Participants	Percentage Change
January	163,436	-
February	165,207	1.1%
March	167,349	1.3%
April	169,021	1.0%
May	171,167	1.3%
June	172,266	0.6%
July	174,152	1.1%
August	175,172	0.6%
September	177,169	1.1%
October	180,194	1.7%
November	182,258	1.1%
December	182,963	0.4%

Note: No monthly variance of 5% or more in the number of participants occurred in PY2009.

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, used the joint utility methodology adopted by the Commission in D.01-03-028 for developing quarterly and monthly penetration estimates in 2009. This method entails annual estimation of eligibility for CARE,

LIEE, and other income-by-household size parameters at the small area (block group, census tract, zip) for each IOU service territory and for the state as a whole.

Sources for this estimation 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/PUMS," U.S. Census and Integrated Public Use MicroData Series ("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 county/utility level eligibility fractions to a new set of "technical eligibility counts" (for CARE these are metered and sub-metered occupied housing units) obtaining an estimate of income/demographic in household count form.

Every month, the utility counts the number of households (by small area, by county, and overall) that are enrolled in CARE. The CARE household total, including individually metered 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 2009 was submitted to the Commission on October 15, 2008 by Southern California Edison on behalf of itself and the other IOUs.¹⁶

¹⁶ Compliance Filing Of Southern California Edison Company (U 338-E) On Behalf Of Itself, Southern California Gas Company (U 904-G), San Diego Gas & Electric Company (U 902-M), Pacific Gas And Electric Company (U 39-M), Regarding The Annual Estimates Of Care Eligible Customers And Related Information, Filed October 15, 2008.

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).

SDG&E counts all residential meters and residential sub-metered units, subtracts the residential accounts with billing tariffs that do not qualify for CARE, this equals the number of eligible residential meters for the CARE program in the San Diego service territory.

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

CARE eligible rates developed as described in question 2.1.2.1. were applied to the current count of CARE eligible meters, as described in question 2.1.2.1, to the estimated number of CARE eligible households to estimate the number of CARE-eligible households in SDG&E service territory.

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 submetered 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-participation rates is:

Number of CARE Customers
Number of Estimated CARE-Eligible Households

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

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

Gas – 27.33%

Electric – 27.55%

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

At year-end SDG&E had 31,993 gas sub-metered customers in 616 master-meter facilities. Assuming 27.33% of its residential gas customers are eligible for CARE, SDG&E estimates that 8,743 of the gas sub-metered units are CARE eligible.

SDG&E had 37,723 electric sub-metered customers; assuming 27.55% of its residential electric customers are eligible for CARE. SDG&E estimates that 10,392 of the electric sub-metered units are CARE eligible. Although SDG&E uses the standard percentage of estimated eligible for sub-metered tenants, SDG&E believes the percentage is understated, as reflected in the current sub-metered tenant counts and sub-metered penetration rates reported below.

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

Gas – 9,978

Electric – 11,110

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

Gas – 114%

Electric – 107%

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

SDG&E did not encounter any problems administering the CARE program for submetered tenants and/or master-meter customers during 2009.

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	\$1,520,638	\$1,653,893	109%
Proc., Certification and Verification	\$216,219	\$218,253	101%
Information Tech./Programming	\$508,795	\$377,919	74%
Pilots	N/A		
Measurement and Evaluation	\$4,000	\$13,772	344% ¹⁷
Regulatory Compliance	\$184,015	\$157,995	86%
General Administration	\$399,065	\$374,414	94%
CPUC Energy Division Staff	\$102,900	\$43,262	42%
Cooling Centers	\$52,000	\$34,603	67%
Total Expenses	\$2,935,632	\$2,839,408	97%
Subsidies and Benefits	\$47,026,184	\$49,525,017	105%
Total Program Costs and Discounts	\$49,961,816	\$52,364,425	105%

¹⁷ In D. 07-12-038, the Commission approved SDG&E's request for \$56,000 in the Measurement and Evaluation Category to fund the final invoice for the Statewide Needs Assessment Report. However, the final invoice for the Needs Assessment Report was not received and paid until July 2009. In addition, the invoice for the 2006-2008 CARE Eligibility Estimates was not received and paid by SDG&E until 2009. These delayed invoices caused SDG&E to be over expended in the M&E cost category.

2.2.2. Please provide the CARE program penetration rate to date

CARE Penetration			
Participants Enrolled	Eligible Participants	Penetration rate	Target Met?
269,517	337,540	80%	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.

CARE Recertification

Month	Complaints Received	Nature of Complaint	Cases Resolved
January	0	None	0
February	0	None	0
March	0	None	0
April	0	None	0
May	0	None	0
June	0	None	0
July	0	None	0
August	16	All customer complaints were due to receiving 2 or more recertification renewal letters or applications after responding to a renewal letter two to three weeks prior. All customers were recertified over the telephone or recertification was verified in the system.	16
September	1	Customer called to verify if her recertification application was received. The customer's application was not in the system. Customer was recertified over the telephone.	1
October	0	None	0
November	0	None	0
December	2	Customers disconnected during automated telephone call for recertification. Customers calling to inform SDG&E of this issue are recertified by the CARE representative over the telephone.	2

2.3. CARE Program Costs

2.3.1. Discount Cost

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

Average Gas Discount – \$4.70
Average Electric Discount – \$12.54

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

Annual Gas Subsidy – \$9,977,652
Annual Electric Subsidy – \$39,547,365

2.3.2. Administrative Cost

2.3.2.1. Show the CARE Residential Program’s administrative cost by category. **See also Table 1 and section 2.2.1 above.**

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 payments and any agency-related outreach support efforts are also included in this category. Capitation payments are compensation fees paid to third-parties and community-based organizations that facilitate CARE enrollment for eligible hard-to-reach customers.

Processing, Certification and Verification: Costs include the CARE Administration Group labor and data entry costs. The function of the CARE Administration Group includes: 1) opening and sorting CARE application forms; 2) processing/data entering all CARE applications; 3) initiating and responding to customers’ inquiries regarding CARE applications/program; and 4) fielding

telephone calls related to CARE program participation; 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 CPUC mandates, and improving operational efficiency.

Measurement and Evaluation: Costs for measurement and evaluation includes contract and staff labor expenses for CARE participant eligibility updates.

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

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

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

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

Gas - \$1,621,648 Overcollection

Electric - \$3,762,498 Undercollection

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 balancing accounts are discount and program specific administrative expenses as described section 2.3.2.1.

- 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 next page)

CARE Progress Report – 2009

Electric

(Pursuant to CPUC Decision D.89-07-062 and D.01-03-028)

<u>Customer Class</u>	<u>Bill (1)</u>	CARE Surcharge			
		Avg. Monthly	% of Bill	Billed (2)	% of Bill
Residential	\$102	\$1.25	1.2%	14,591,365	33%
Commercial	\$700	\$10.73	1.5%	18,460,310	42%
Industrial	\$48,730	\$1,249.25	2.6%	10,442,492	23%
Agricultural	\$977	\$15.65	1.6%	722,717	2%
Total				\$44,216,884	100%

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

(2) CARE Surcharge is a component of the funds billed per the public purpose programs (PPP) rate.

CARE Progress Report – 2009

Gas

CARE Surcharge and Revenue Billed by Customer Class

<u>Customer Class(1)</u>	<u>Bill (2)</u>	CARE Surcharge			
		Avg. Monthly	Avg. Monthly	%of Bill	Billed (3)
Residential	\$29	\$1	3%	6,240,868	48%
Commercial	\$317	\$14	4%	5,058,130	39%
Natural Gas Vehicles	\$16,051	\$1,128	7%	323,862	2.51%
Industrial	\$11,771	\$1,772	15%	1,266,057	10
Total				\$12,907,286	100%

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

(2) Includes PPP Surcharge funds.

(3) CARE Surcharge funds billed as a component of the PPP rate (Schedule G-PPPS) for payment to California Board of Equalization (BOE)

2.4. Outreach

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

1. **Intra-Utility Integration** - Outreach methods undertaken by SDG&E using company resources and channels to promote program enrollments.

LIEE - The LIEE program provides in-home energy education, home weatherization, and information on the CARE program. A check box is located on the weatherization assessment form that allows the customer to opt in to the CARE program. In 2009, LIEE provided 2,813 enrollments for the CARE program.

Customer Contact Employees - The relationship with SDG&E's Call Center plays a significant role in the program reaching its participation goals. Customers may contact SDG&E's Call Center and speak with a Customer Service Representative (CSR) on a multitude of issues. During the course of the telephone contact, CSRs are able to resolve the customer needs as well as gauge potential opportunities for enrollment in the CARE program. In 2009, 14,054 enrollments were attributed to call center efforts. CSR's also refer customers to the CARE online application as another method of applying for the program.

2009 Bill Inserts and Annual Notification - In February a CARE application was included inside SDG&E bills of customers not yet enrolled in the program. The insert consisted of a single language and simple design layout. The annual notification, which occurs once a year in July, consists of a multiple language (English/Spanish) applications inserted in all customer bills. Bill inserts continue to rank high in customer satisfaction surveys. In fact, bill inserts are identified as a preferred method of receiving program information. Additionally, customer's recollect receiving bill inserts as the first notification of the offer to enroll in the CARE program. As a result of bill inserts, SDG&E enrolled 2,306 customers in the CARE program in 2009.

Bill Message - SDG&E promotes Customer Assistance Programs with a message on the utility bills. These bill messages are sent on a quarterly basis and include information on several programs the utility offers. The outer envelope of customer's utility bill promotes programs through a single line message on the back outer flap. In 2009, a general message for assistance was included on the outer flap of envelopes containing customer bills. The message read, *"Are you having problems paying your bill?" "See if you qualify for assistance programs or services, Call 1-800-411-7343 or visit sdge.com."* The message appeared on the outer flap of the envelope during the months of February, April, and May. Customers were given the opportunity to call the utility to set up payment arrangements, inquire about other programs, and if interested were sent a CARE application or directed to the on-line application. As part of SDG&E's extra help campaign, a message was printed on all customer bills during the months of February and March 2009. The message read, *"Need help paying your SDG&E bill?" "You may qualify for assistance, "Visit sdge.com/extrahelp or call 1-800-411-7343 for details."*

The company newsletter, *Energy Notes* is a monthly publication that features information on different programs, services, and other items that may be of interest to customers. In March 2009, *Energy Notes* featured an article on customer assistance programs available to customers in need. One of the articles featured a description of the CARE program and how to apply.

Interactive Voice Response (IVR) Information on Hold - Customers calling into the company telephone number are routed through an IVR system. Customers may hear different messages while on hold and have the opportunity to request more information through the IVR process. Customers can also request a CARE application in English or Spanish by following the prompts during the "on hold" process. In 2009, customers requested 2,260 applications in English and 426 applications in Spanish through the IVR.

Branch Offices and Field Collection Services - Customers visiting branch offices are provided information about the CARE program. Applications are on display in branch offices. Branch office representatives are trained to offer the CARE program when a customer demonstrates a need for the program by requesting payment arrangements, having difficulty paying their bill, or has received a disconnection notice. Field collectors

promote the CARE program while delivering notices to customers facing disconnection. Also, during the course of promoting and notifying SDG&E customers about the Smart Meter installation, the CARE program information was distributed to customers when necessary.

Customer Brochures - New residential customers entering SDG&E's service territory for the first time receive a New Customer Welcome Packet. The packet is available in English and Spanish. Included in the packet is a CARE application. In 2009, approximately 90,000 new residential welcome packets were mailed to customers and of these, 588 were enrolled. In addition, SDG&E has a Customer Assistance Packet available upon request from a customer. The packet includes a CARE application, a fact sheet on all Residential Assistance Programs, and an Energy Savings Guide. The Cool Zone brochure, available at 130 Cool Zone locations, also refers to the CARE program.

In-Language Resources - SDG&E's 24-hour customer call center is staffed with English, Spanish and Vietnamese speaking CSRs to assist customers in accessing information about utility services. The CARE program staffs English speaking and Spanish speaking staff members. The Spanish speaking employees are scheduled early morning and later in the day to ensure potential Spanish speaking customers will be given the opportunity to speak in their language. Additionally, SDG&E contracts with Language Line® Services¹⁸ organization to provide in-language support to customers whose language is not spoken by SDG&E CSRs. The service offers interpreter service for different languages and dialects including but not limited to; French, German, Italian, Japanese, Russian and Tagalog. SDG&E representatives remain on the telephone line with the customer and connect them to the interpreter for translation. SDG&E also operates a TTY/TDD service, available 24 hours a day, seven days a week. The CARE application is available on the company website in 13 languages. The languages included are English, Spanish, Arabic, Armenian, Chinese, Farsi, Hmong, Khmer, Korean, Russian, Tagalog, Thai, and Vietnamese.

¹⁸ Language Line® provides live, over-the-phone language interpretation and translation services in over 170 languages.

Door-to-Door Outreach - SDG&E continued to partner with a third-party contractor, Burgers, Inc/Energy Save, in 2009. Representatives cover the service territory, guided by a contact list of non-CARE customers in areas with high potential for eligibility. They speak to customers about CARE and are able to assist them in completing the application. Application data is then submitted electronically on a weekly basis and uploaded directly into the data management system, reducing processing and postage costs as applications are not mailed individually and the upload process is much more efficient than opening, sorting, and handling individual applications that are received via U.S. mail. Also, customers are able to begin receiving the CARE benefit sooner, as the time between applying and enrolling may be as short as a day or two. SDG&E enrolled 12,438 customers through these personal visits.

CARE Partnership with Residential EE Programs

In an integrated effort with SDG&E's EE programs, 37 CARE applications and 2 LIEE referrals were completed at Lighting Turn-In events by the CARE capitation contractor, Neighborhood Health Care. Leveraging CARE enrollment efforts with a CARE capitation contractor at these events represents an improvement in the process for three reasons: 1), the Lighting Turn-In event has the opportunity to present a more complete picture of the programs SDG&E offers to residential customers including low income customers; 2), CARE capitation contractors are offered an opportunity to present their programs and enroll customers on CARE; and 3), although Residential EE programs do not target low income customers at all Lighting Turn-In events, customers gain familiarity with the CARE program and program recognition is increased throughout the service territory.

Low Income Home Energy Assistance Program (LIHEAP)

SDG&E partners with all three LIHEAP agencies in the San Diego service territory to offer CARE enrollment through the capitation program. Additionally, SDG&E utilizes an internal report of customers receiving LIHEAP payments, to ensure those not already participating in CARE are enrolled.

2. **Inter-Utility Integration** - Enrollment efforts which utilize data-sharing technologies between IOU's in a shared service territory.

Data Exchange - SDG&E and Southern California Gas Company (SoCalGas) exchange CARE customer data in the shared service territory of Southern Orange County throughout the program year, 135 customers were enrolled through this exchange. Customers were mailed a letter, indicating the enrollment took place and were provided an opportunity to opt out of the program in the same letter.

3. **Targeted Outreach Efforts** - Outreach and enrollment strategies implemented by the utility to enroll a large number of customers in an effort to maximize enrollments and increase program awareness.

Telephone Enrollment - SDG&E used automated voice messaging (AVM) technology to contact and enroll potentially-eligible customers. SDG&E contracted with a third party to administer the campaigns through an outbound dialing system which enabled the contact of thousands of customers in a short period of time. Through this process, the program was able to reach approximately 300,000 customers. SDG&E was able to manage and monitor campaign progress through a web based system. This interface allowed the utility the highest level of control. 11,181 customers were enrolled in CARE through the AVM process. AVM campaigns were also used to recertify customers. The typical recertification process involves multiple notifications to the customer's address. After two notifications and a bill message, if no response is received, customers are removed from the program. SDG&E attempted to capture the recertification over the phone, before a notification is sent to the customer's household. Almost 10,000 customers recertified their eligibility over the telephone during 2009. Customers who did not take part in the recertification by phone method were routed through the normal course of recertification. This course of action provided an alternate method of recertification for customers, while saving printing, mailing and processing costs for the utility.

Direct Mail - Direct mail has worked well for the CARE program. Six campaigns took place in 2009. Over 160,000 pieces, in both English and Spanish, were mailed to

potentially eligible customers. The average response rate was 3% and the program enrolled approximately 78% of those responses. SDG&E believes direct mail campaigns are an effective means of reaching the customers who prefer this method. Out of six total campaigns, 4,202 customers were enrolled in CARE. One of the benefits of direct mail is customers can still apply for CARE by sending back the application form long after a direct mail campaign is completed. An additional 244 CARE enrollments were received during 2009 from past direct mail campaigns.

Direct Mail to Customers with Disabilities - SDG&E utilized a third party vendor to generate a mailing list targeting potentially-eligible and disabled customers. The direct mailing included a letter and CARE application in large font (16 pt) along with a business reply envelope. SDG&E was not able to match a significant number of the names provided to the name of customer of record for the account.¹⁹ From a list of over 5,000 names, only 441 were matched in the system. From this effort, 9 customers were enrolled in the CARE program.

4. **Mass Media Outreach** - Mass media is a valuable channel for reaching the public masses, raising awareness for the program, and supplementing other outreach tactics. In 2009, SDG&E used a broad spectrum of mass media including; radio, print, web, and outdoor media. When paired with other outreach tactics such as direct mail, bill inserts, and telephone campaigns, SDG&E believes the influence of mass media has a positive effect on the program.

Extra Help Campaign - The economic downturn sparked a special campaign launched by SDG&E targeting the recently unemployed. In this campaign, SDG&E targeted English and Spanish speaking customers as well as African-American, seniors, and the Filipino populations. Print ads were featured in community publications in San Diego and Orange County. The ads began in February and ran through the first week of March 2009.

¹⁹ The CARE program requires the applicants name to match the name of the customer of record in SDG&E's billing system.

General Awareness Campaign - To reinforce the extra help campaign, a separate campaign was launched to promote all of SDG&E’s Customer Assistance Programs. The campaign focused on educating customers on all of the assistance available to them through SDG&E. The campaign targeted low income English and Spanish speaking customers. The tactics included radio spots, newspaper advertising, and bus shelter posters. All tactics were executed in English and Spanish. The campaign ran for six weeks, beginning in July 2009.

Radio - SDG&E purchased radio air time for disc jockey (DJ) ad libs, which are non-scripted short spots which discuss certain topics. SDG&E purchased 60-sec, 30-sec, and 10-sec spots on eight different radio stations for promotion of its general awareness campaign. The spots mentioned all of the customer assistance offerings, including the CARE program. The radio formats were a mixture of English and Spanish language radio stations. The specialized radio stations included;

English Speaking Format	Spanish Speaking Format
KFMB-FM	XHRM-FM
KLNV-FM	XHTY-FM
KSON-FM	XHTZ-FM
KLQV-FM	XLTN-FM

Print - As part of SDG&E’s general awareness campaign, print ads featuring all of SDG&E’s Customer Assistance Programs, including the CARE program were featured in the following publications:

Life After 50- ad featuring SDG&E Customer Assistance Programs with a circulation of 25,000 readers.

North Park News- ad featuring SDG&E Customer Assistance Programs with a circulation of 12, 500 readers.

Voice and Viewpoint- ad featuring the SDG&E Customer Assistance Programs, circulation 25,000 readers.

Chula Vista Star News- ad targeting the unemployed, featuring SDG&E bill payment assistance options, circulation 33,500 readers.

Diario San Diego- Spanish language, targeting the unemployed, featuring SDG&E bill payment assistance options, circulation 30,000 readers

El Latino- Spanish language, targeting the unemployed, featuring SDG&E bill payment assistance options, circulation 90,000 readers.

Enlace- Spanish language, targeting the unemployed, featuring SDG&E bill payment assistance options, circulation 85,000 readers.

San Diego Eldercare Directory- Full page ad featuring SDG&E Customer Assistance Programs, circulation 70,000 readers

Outdoor Media - As part of the general awareness campaign, SDG&E enlisted the use of outdoor media for repeated exposure. Poster ads were displayed in mass transit shelters and featured two people, calculating their bill, and the words; “*If you’re facing financial hardship, SDG&E may be able to help.*” The ads were displayed in 60 mass transit shelters from July to middle of September.

Online - With the media culture changing and more people going online for their needs, online promotion was a heavy focus during the months of September-November. Based on input from an interactive agency, the areas of focus were banner ads and paid search ads. Banner ads were featured on social networking sites like *Facebook* and *MySpace*. Banner ads were also featured on the popular Hispanic sites *Es Mas*, *Puntofox*, and *Univision*. The employment search web site *Snag a job* also featured ads. Paid search ads were advertised through *Bing*, *Google* and *Yahoo*.

Grassroots Outreach Efforts

The Grassroot Outreach is used by SDG&E to raise overall public awareness of the CARE Program and also identify low income customers who traditionally haven't responded to less personal types of outreach.

Community Cares Project

The Community Cares Project is sponsored by a CARE capitation contractor, the San Diego Food Bank. Leveraging with other utilities and community based organizations, corporations, charities and government agencies customers are advised on their eligibility for SDG&E programs and services and, when appropriate, enroll them in CARE. Events are held in neighborhoods with high potential for eligible CARE customers, in the following zip codes: 92105, 92114, 92103, 92173, 92019, 91977, 91910, 91941 and 91945. As a result of the collaboration, 528 customers were enrolled in CARE. This partnership continues to increase public awareness of the CARE program and provides integrated outreach efforts with many CARE capitation contractors including North County Health Services, Women's Resource Centers, Chinese Service Center and the San Diego Urban League.

Deaf Community Services

SDG&E began to develop outreach efforts with agencies representing the needs of customers with disabilities. In October 2009 at the "Deaf Awareness Day" event, SDG&E delivered four presentations during the day to 1750 participants. Based on this new CARE capitation contractor, there is an opportunity to expand the CARE program into a hard to reach customer base in the service territory.

Salvation Army Holiday Cheer Program

Since 2007, SDG&E has partnered with one of its CARE capitation contractors, the Salvation Army, to enroll low income customers in CARE during the intake events at Salvation Army sites. SDG&E leveraged enrollment efforts with Salvation Army CARE capitation contractors in Escondido, Chula Vista, Oceanside, El Cajon and downtown San Diego. In 2009, there were 297 CARE enrollments achieved.

San Diego County Health & Human Services Agency (HHS)

The San Diego County Health and Human Services partnership with SDG&E continues to expand into different areas of the Health and Human Services infrastructure. The following are the areas of HHS infrastructure where SDG&E Customer Assistance Department has made an impact.

Aging and Independence Services (AIS) Cool Zones

Leveraging SDG&E's partnership with the HHS through Aging and Independence Services, a grand opening of a new Cool Zones was organized at the Salvation Army Nutrition Center in El Cajon. County Supervisor Diane Jacobs attended and expressed her satisfaction with the program and SDG&E's 7 year commitment to its success. More than sixty customers participated in this event and received an overview of all Customer Assistance Programs. Although many of the customers were already enrolled in CARE and some had received LIEE services, there were many that had not or were unaware of the programs offered by the utility. As a result of the Cool Zone grand opening SDG&E received a total of 27 CARE enrollment applications.

Family Resource Centers

Through working with HHS at two Family Resource Centers one in Escondido and the other in Chula Vista SDG&E was able to obtain 192 CARE enrollments during the winter season.

Employment Development Department

Leveraging enrollment opportunities with South Bay Community Services, 71 CARE enrollments were taken at local Employment Development Department offices in Chula Vista. This effort was especially important during 2009 because unemployment was at 10% when this effort was launched.

MediCal & CalWorks Program

Leveraging enrollment efforts with HHS resulted in 217 customer enrollments on CARE. The enrollments are taken when the customer registers with the County for MediCal and CalWorks benefits. What began as a paper application process in 2007 has improved into a more cost-efficient system of data sharing. The current data sharing process is limited to

new enrollees in MediCal who sign paper release of information forms. Although the current process requires a hardcopy release of information, SDG&E continues to work with the County toward data sharing with County entities.

“Second Chance” Community Resource Fair

Second Chance is an organization dedicated to “breaking the cycle of unemployment, poverty, homelessness, substance abuse and incarceration that plague” San Diego.”

SDG&E participated in the Resource Fair on May 15 in San Diego, distributing CARE applications to individuals transitioning from half-way houses and rehabilitation centers.

Twenty-seven CARE applications were completed. Only 11 CARE enrollments were achieved but it is expected that greater success will be achieved as SDG&E continues to build its relationship with this organization. As a result of this outreach effort participants will be able to make educated and informed choices about customer assistance programs and energy efficiency measures applicable for their new homes.

Native American Cultural Festival

In May 2009, SDG&E leveraged the outreach and enrollment efforts with several tribal clinics in the San Diego service territory. This outreach effort is significant because the Native American population is historically difficult to reach. While only a few CARE applications were received (6 in total), this event served to connect with key service providers in the community.

WeCARE California Resource Fair

As part of a weeklong series of customer resource fairs being held in April 2009, the partnership of the CPUC, SDG&E, Urban League of San Diego and Workforce Partnership joined efforts to assist over 5,000 San Diego residents at the San Diego Career Opportunity Exchange and We Care California Resource Fair.

Pre-event unpaid media coverage included an article in the San Diego Union Tribune, a “Community Spotlight” interview with SDG&E to discuss the WeCARE California event on SignOnRadio, public service announcements on KIFM (Smooth Jazz 98.1), XHRM-

FM (Magic 92.5) and XHTZ-FM (Jammin'Z 90.3) the week prior to the event. Pre-event paid media coverage included print and radio advertisements and flyers which pointed customers to SDG&E's website www.sdge.com/wecare for more information. In addition, customers in zip codes with high potential for CARE eligibility were mailed postcards, personally inviting them to the event.

There was also significant media coverage during the event, beginning with live interviews during the morning newscasts inviting viewers to the event. SDG&E's Vice President of Customer Operations; Ray King, CEO San Diego Urban League; Mark Cafferty, CEO Workforce Partnership; and Paul Clanon, Executive Director of the CPUC provided interviews and information throughout the event. Day of event media coverage included: *KBNT 17 Univision, KGTV 10 ABC, KNSD 7/39 NBC, KUSI 9/51, FOX 5 San Diego, The CW San Diego 6, XHAS 33 Telemundo, Azteca America, Urban Broadcast News Network (UL), Radio Latina 104.5 FM and Frontera Newspaper.*

The event targeted job seekers and featured information about customer assistance programs, such as CARE, LIEE and bill assistance and offered employment and community resources. Participation by community-based organizations and local companies created a "one-stop shop" for employment, financial and community services and aid. This event served as an excellent example of how SDG&E leverages the resources of external organizations and integrates efforts with other SDG&E programs.

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

SDG&E measures the effectiveness of its outreach efforts in several ways:

- Greatest source of enrollments;
- Most cost effective method of enrollment; and
- Most efficient method of enrollment.

In 2009, 16.4% of all enrollments were attributed to the use of the internet. SDG&E enrolled 14,374 customers in CARE using an internet enrollment form. Enhancements to the Internet application were completed in mid-2009 allowing customers to send application information directly to the CARE Administration Group for approval. This change significantly shortened the time and effort previously associated with processing online applications because the customer is entering all the information required on the CARE application and only a brief review is required to complete the process. Due to the high number of enrollments received through this effort and the low processing cost, Internet enrollment has become SDG&E's most effective form of outreach.

Additional effective outreach methods included, the Customer Call Center providing 16.1% of all enrollments and the Door-to-door campaign, generating 14% of all enrollments.

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

In 2009, SDG&E enrolled 79% of all eligible customers into the CARE program. Despite this significant achievement, there are ongoing challenges.

Barrier - While AVM campaigns produce a large percentage of enrollments for the program, California telemarketing guidelines and laws prohibit calling customer cell phone numbers to deliver marketing messages. While the laws are interpreted differently, the company has taken a position of prohibiting cell phone contact to avoid any potential customer complaints or violations. For example, each campaign targeted a certain number of customers. Once a number of eligible customers was determined, SDG&E, using software from its AVM vendor, removed the customers whose account contained a cell phone number as the primary contact number. While each campaign contained a certain percentage of customers removed from the base number, the average percentage removed for the entire year was 37%.

Mitigation - SDG&E relied on other outreach methods, such as direct mail and door-to-door, to contact those customers filtered through the AVM cell phone scrub process.

Barrier - SDG&E continues to face contacting the same customers throughout the year without any information on why the customer does not respond to various marketing approaches. SDG&E's findings are consistent with the conclusions in the 2007 KEMA Low Income Needs Assessment, which estimates that 10% of eligible customers are unwilling to participate.

Mitigation - SDG&E recognizes that some customers may require unique marketing tactics and continues to offer and develop these approaches. The 2009 enhancement of the CARE online application and current development of the CARE IVR system are examples of these efforts. Further, SDG&E is developing additional tracking systems to capture customer contact attempts, and reasons for nonresponses. The goal of these systems is to identify customers who are ineligible or unwilling to participate. Beginning in PY2010, SDG&E will begin contracting with agencies serving limited-English proficient clients, the disabled, and seniors and will pay a capitation fee for referrals which lead to enrollments in the LIEE program. SDG&E is confident that this approach will also act as a catalyst to gaining more CARE enrollments from this customer segment.

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

SDG&E and SoCalGas exchanged CARE customer data in the shared service territory of Southern Orange County throughout the program year. In 2009, SDG&E received 142 potential enrollees from this list and enrolled 135 customers.

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

SDG&E's LIEE program provides recipients of LIEE services with in-home energy education, including CARE information and an opportunity to apply for CARE. A "check box" option 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 LIEE data management system 6,928 customers who had indicated interest in CARE and were determined eligible for participation based on income documentation provided as part of qualifying for the LIEE program. Enrollments from LIEE totaled 2,813 in 2009.

- 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 worked with a large school district within its service territory to obtain information on the students enrolled in the district who were also receiving benefits from the National Free and Reduced School Lunch program (NSL). Shortly after the beginning of the school year, SDG&E was provided a list of such participants. The list contained 24,800 records and included the names of the students' primary contact (parent or guardian) and the home address currently on file with the district. SDG&E was able to match approximately 12,400 to current, active accounts in its system and of these, 3,012 were not already enrolled in CARE. The list was uploaded into the CARE database, and resulted in 2,726 enrollments. Of those who were not enrolled, 84 were ineligible due to enrollment at another account, 40 had been dropped due to non-response to previous income verification requests, 98 were enrolled between the

time of the data match and upload, and 64 had pending applications or the accounts had been finalized before the upload process was initiated. All those enrolled this way were notified via letter and given the opportunity to cancel their enrollment by calling or sending an email to SDG&E. SDG&E received approximately 25 requests for removal in response to this mailing.

- 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 Home Energy Assistance Program (HEAP) 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.

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

SDG&E significantly improved its process of Internet Enrollment in 2009. Previously, the applications of customers who applied online were sent via email to the lead CARE Processor who would work with the processing team to enter the information received into the data management system (the “CARE system”), and enroll the customer. This process was streamlined in 2009 by creating an interface between the Internet application available on SDGE.com and the CARE system. This enhancement has enabled the customer’s eligibility information to be sent directly to the data management system, ensuring accuracy and enhancing processing efficiency. The application created by the customer awaits review by a processor before becoming an enrollment. Internet applications are typically processed within 12 hours of their submittal. Once processed, if a valid email address was provided, the customer is sent electronic confirmation of enrollment immediately.

2.5. Processing Care Applications

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

In previous years, SDG&E conducted annual recertification of sub-metered tenants. Submetered recertification applications, along with a “Tenant’s Rights Fact Sheet” were mailed directly to the tenants in early September. Also, the recertification process included a “preliminary” notice to the managers or owners of the development on the upcoming process. The notification packet contained posters in English and Spanish, for the manager to post to notify the tenants and

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

As part of the 2009-2011 CARE Application, SDG&E requested to change the annual notification to a two-year process to be consistent with the requirements for all residential customers. Tenants were also made eligible for the four-year fixed income recertification period for those customers declaring their income was from, Social Security or retirement accounts. This change was implemented in 2009; therefore, the next recertification process will take place in June 2010. This process will differ from the previous years in that sub-metered tenants will be asked to recertify according to their enrollment date (rather than all tenants being asked at one time).

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

SDG&E contracts with a third party to recertify customers through AVM. SDG&E does not contract with third parties to process certification, recertification and/or verification on the utility's behalf. SDG&E processes and approves all CARE enrollment, recertification and verification internally.

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 issues or events that significantly affected program management in 2009.

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.

CARE Expansion Program						
2009	Participating Facilities by Month (Gas)			Participating Facilities by Month (Electric)		
	CARE Residential	CARE Commercial	Total	CARE Residential	CARE Commercial	Total
January	386	147	533	577	243	820
February	383	147	530	574	242	816
March	383	147	530	572	242	814
April	381	147	528	570	241	811
May	381	147	528	569	242	811
June	372	148	520	567	242	809
July	372	148	520	568	242	810
August	361	148	509	558	241	799
September	361	148	509	558	241	799
October	361	147	508	558	239	797
November	353	147	500	546	239	785
December	349	147	496	541	239	780

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

	Gas	Electric
Residential	7,623	7,138
Commercial	3,163	5,702

3.2. Usage Information

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

CARE Expansion Program		
Average Monthly Gas / Electric Usage¹		
	Gas	Electric
Customer	Therms	KWh
Residential Facilities	62	502
Commercial Facilities	397	7,716

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: \$13.07

Electric: \$18.58

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

Gas: \$56.94

Electric: \$197.43

3.4. Outreach

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

See Section 2.5.2.

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 Market Advisors promote the Expanded CARE program through field visits to local agencies that may benefit.

- 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 participating 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.

There were no barriers to participation encountered during PY 2009.

- 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.

Enhancing the online Expanded CARE application by integrating it with the processing system may be a cost-effective improvement. Many of the participating agencies add and remove accounts on a regular basis. An online applications process would allow the agencies to better manage these changes. SDG&E has not investigated whether the cost to implement the online application outweigh the benefits.

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 believes this change was a cost-effective way of reducing program cost. This change was also helpful in retaining agency participation and improving satisfaction from agencies enrolled in the program.

4. Fund Shifting

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

In 2009, SDG&E exceeded its LIEE program goal of 20,384 homes to be treated by 3% ,resulting in 20,924 total homes treated. The LIEE program activities increased in the “Weatherization” and “Outreach and Assessment” program subcategories than projected in SDG&E’s 2009 program planning assumptions. The costs in the “Weatherization” subcategory increased due to the installation of weatherstripping which SDG&E did not budget in its 2009-2011 LIEE program cycle. In addition, the costs for the “Outreach and Assessment” program subcategory increased due to an unanticipated increase from program canvassing efforts and also an increase in the cost of enrollment to capture all customer contact attempts for reporting purposes. In D.08-11-031, the Commission allows the utilities the flexibility to “shift up to 15% of LIEE funds among budget categories with the exception that allocations may be to program areas only, not administrative overheads or regulatory compliance costs.”²⁰ In addition Section 20.3.2.2. of D.08-11-031 states “[T]o be clear, funds in the program categories Energy Efficiency, Training Center, Inspections, and Marketing can be shifted among these at the IOUs discretion.” SDG&E ability to shift funds was in compliance with the rules set forth in Section 20, which includes Section 20.1 of D.08-11-031.

²⁰ See section 20.1. of D.08-11-031.

SDG&E's LIEE program design presented in its Application proposed the installation of certain measures based on the customized energy audit. The intended purpose of the proposed customized energy audit was to determine which measures should or should not be installed in a customer's home, based on each individual customer's historical and claimed energy usage.²¹

Ordering Paragraph 16 of D.08-11-031 directed the IOUs to pursue a "whole house approach" to meet LIEE customers' needs, and stated that each eligible home would receive an individualized energy audit so that it would obtain all feasible measures necessary for maximal energy efficiency. However under SDG&E's program proposal certain measures such as weatherstripping, caulking, and outlet gaskets were excluded. To adhere to the Commission's directive, in 2009 SDG&E installed all feasible measures using the authorized budget and SDG&E does not plan to seek additional program funds at this time to accommodate the additional measures for the 2009-2011 program cycle. The LIEE program fund shifting for PY2009 is shown in LIEE Table 19.

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

All CARE program fund shifting activity falls within the rules in Section 20.1 of D.08-11-031. The costs for the "Outreach and Processing, Certification and Verification" program categories increased due to an unanticipated increase from program canvassing efforts and also an increase in the cost of processing, certification and verification, which is a direct result of the additional canvassing efforts. SDG&E's ability to shift funds was in compliance with the rules set forth in D.08-11-031. The CARE program fund shifting for PY2009 is shown in CARE Table 13.

²¹ SDG&E proposed to group the customers into tiers by household energy usage (high, medium, and low).

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

In 2009, there was no fund shifting activities that occurred under the LIEE or CARE programs that fell outside the fund shifting rules set forth in D.08-11-031.

5. Appendix: LIEE Tables and CARE Tables

LIEE- Table 1- LIEE Overall Program Expenses

LIEE- Table 2- LIEE Expenses & Energy Savings by Measures Installed

LIEE- Table 3- LIEE Cost Effectiveness

LIEE- Table 4- LIEE Penetration

LIEE- Table 5- LIEE Direct Purchases & Installation Contractors

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

LIEE- Table 7- Expenditures by Cost Elements

LIEE- Table 8- Detail by Housing Type and Source

LIEE- Table 9- Life Cycle Bill Savings by Measure

LIEE- Table 10- Energy Rate Used for Bill Savings Calculations

LIEE- Table 11- Bill Savings Calculations by Program Year

LIEE- Table 12- Whole Neighborhood Approach

LIEE- Table 13- Categorical Enrollment

LIEE- Table 14- Leveraging

LIEE- Table 15- Integration

LIEE- Table 16- Lighting

LIEE- Table 17- Studies & Pilots

LIEE- Table 18- “Add Back” Measures

LIEE- Table 19-LIEE Fund Shifting

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 5- Capitation Contractors
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

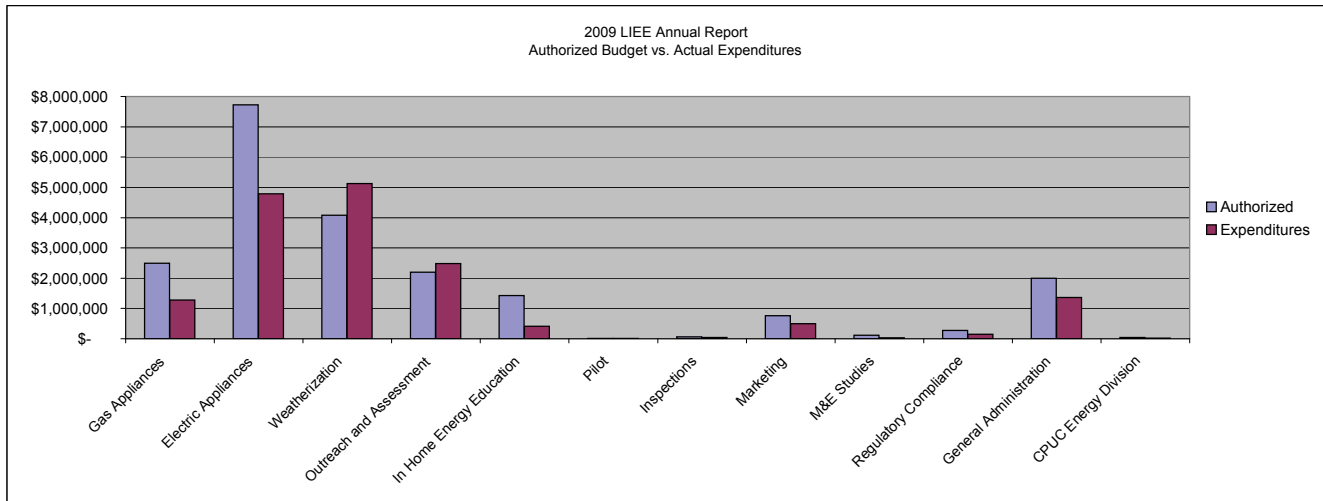
PY 2009 Low Income Energy Efficiency Annual Report
LIEE Table 1
LIEE Overall Program Expenses
San Diego Gas & Electric Company

LIEE Program:	2009 Authorized Budget			2009 Annual Expenses			% of 2009 Budget Spent		
	Electric	Gas	Elec & Gas- Authorized	Electric	Gas	Elec & Gas- Spent ¹	Electric	Gas	Elec & Gas
Energy Efficiency									
- Gas Appliances	\$ -	\$ 2,496,401	\$ 2,496,401	\$ -	\$ 1,282,051	\$ 1,282,051	0%	51%	51%
- Electric Appliances	\$ 7,724,611	\$ -	\$ 7,724,611	\$ 4,790,823	\$ -	\$ 4,790,823	62%	0%	62%
- Weatherization	\$ -	\$ 4,081,115	\$ 4,081,115	\$ -	\$ 5,124,901	\$ 5,124,901	0%	126%	126%
- Outreach and Assessment	\$ 1,096,914	\$ 1,096,914	\$ 2,193,828	\$ 1,240,344	\$ 1,240,344	\$ 2,480,688	113%	113%	113%
- In Home Energy Education	\$ 715,835	\$ 715,835	\$ 1,431,670	\$ 205,593	\$ 205,593	\$ 411,186	29%	29%	29%
- Education Workshops	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
- Pilot [2]	\$ 3,839	\$ 3,839	\$ 7,678	\$ 6,456	\$ 6,456	\$ 12,912	168%	168%	168%
Energy Efficiency TOTAL	\$ 9,541,199	\$ 8,394,104	\$ 17,935,303	\$ 6,243,217	\$ 7,859,345	\$ 14,102,562	65%	94%	79%
Training Center									
Training Center	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Inspections									
Inspections	\$ 29,474	\$ 29,474	\$ 58,948	\$ 20,887	\$ 20,886	\$ 41,773	71%	71%	71%
Marketing									
Marketing	\$ 378,735	\$ 378,734	\$ 757,469	\$ 248,315	\$ 248,315	\$ 496,629	66%	66%	66%
M&E Studies									
M&E Studies	\$ 56,902	\$ 56,902	\$ 113,804	\$ 15,080	\$ 15,080	\$ 30,159	27%	27%	27%
Regulatory Compliance									
Regulatory Compliance	\$ 135,720	\$ 135,719	\$ 271,439	\$ 74,028	\$ 74,027	\$ 148,055	55%	55%	55%
General Administration									
General Administration	\$ 1,001,049	\$ 1,001,048	\$ 2,002,097	\$ 681,343	\$ 681,340	\$ 1,362,684	68%	68%	68%
CPUC Energy Division									
CPUC Energy Division	\$ 22,474	\$ 22,474	\$ 44,948	\$ 9,270	\$ 9,270	\$ 18,541	41%	41%	41%
TOTAL PROGRAM COSTS	\$ 11,165,553	\$ 10,018,455	\$ 21,184,008	\$ 7,292,139	\$ 8,908,264	\$ 16,200,403	65%	89%	76%
Funded Outside of LIEE Program Budget									
Indirect Costs				\$ 397,274	\$ 412,046	\$ 809,321			
NGAT Costs				\$ -	\$ 294,088	\$ 294,088			

¹ 2009 expenditures include the posting of an invoice/credit for CFLs installed in PY2008 in the amount of \$4,077.11 along with manual adjustments for Outreach &

² The authorized dollars per D.08-11-031 is for the WET pilot, however no dollars were expended in 2009 for this pilot.

SDG&E received approval from the Energy Division to start the In-Home Display pilot in 2009 and the dollars expended is for the purchase of the equipment only.



**PY Low Income Energy Efficiency Annual Report
LIEE Table 2
LIEE Expenses and Energy Savings by Measures Installed
San Diego Gas & Electric Company**

Measures	Units	PY Completed & Expensed Installations					
		Quantity Installed	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses	% of Expenditures
Heating Systems							
Furnaces	Each	1,725	-	-	2,388	\$ 517,308	4%
Cooling Measures							
A/C Replacement - Room	Each	408	20,740	16.73	-	\$ 359,954	3%
A/C Replacement - Central	Each	3	1,520	-	-	\$ 10,840	0%
A/C Tune-up - Central	Each	40	8,727	-	-	\$ 4,400	0%
A/C Services - Central	Each	-	-	-	-	\$ -	0%
Heat Pump	Each	-	-	-	-	\$ -	0%
Evaporative Coolers	Each	-	-	-	-	\$ -	0%
Evaporative Cooler Maintenance	Each	-	-	-	-	\$ -	0%
Infiltration & Space Conditioning							
Envelope and Air Sealing Measures	Home	15,400	166,463	-	39,785	\$ 2,982,583	21%
Duct Sealing	Home	64	3,261	-	931	\$ 63,045	0%
Attic Insulation	Home	554	1,893	12.74	19,626	\$ 510,025	4%
Water Heating Measures							
Water Heater Conservation Measures	Home	16,236	194,497	909.22	168,346	\$ 1,199,254	9%
Water Heater Replacement - Gas	Each	38	-	-	460	\$ 29,890	0%
Water Heater Replacement - Electric	Each	1	179	-	-	\$ 800	0%
Tankless Water Heater - Gas	Each	-	-	-	-	\$ -	0%
Tankless Water Heater - Electric	Each	-	-	-	-	\$ -	0%
Lighting Measures¹							
CFLs	Each	111,014	1,776,704	31.73	-	\$ 771,591	5%
Interior Hard wired CFL fixtures	Each	11,934	761,389	-	-	\$ 869,859	6%
Exterior Hard wired CFL fixtures	Each	2,973	-	-	-	\$ 159,204	1%
Torchiere	Each	6,790	1,296,890	-	-	\$ 636,267	5%
Refrigerators							
Refrigerators -Primary	Each	2,321	1,722,781	294.77	-	\$ 2,187,476	16%
Refrigerators - Secondary	Each	-	-	-	-	\$ -	0%
Pool Pumps							
Pool Pumps	Each	-	-	-	-	\$ -	0%
New Measures							
Forced Air Unit Standing Pilot Change Out	Each	186	-	-	7,770	\$ 51,388	0%
Furnace Clean and Tune	Each	9,566	-	-	12,031	\$ 535,354	4%
High Efficiency Clothes Washer	Each	-	-	-	-	\$ -	0%
Microwave	Each	265	185,076	-	-	\$ 22,260	0%
Thermostatic Shower Valve	Each	3,545	55,461	-	31,824	\$ 205,551	1%
LED Night Lights	Each	28,720	293,518	-	-	\$ 76,097	1%
Occupancy Sensor	Each	-	-	-	-	\$ -	0%
Pilots							
In-Home Display ²	Each	-	-	-	-	\$ 12,912	0%
Programmable Controllable Thermostat	Each	-	-	-	-	\$ -	0%
Customer Enrollment							
Outreach & Assessment ³	Home	20,847	-	-	-	\$ 2,482,148	18%
In-Home Education	Home	20,774	-	-	-	\$ 411,390	3%
Education Workshops	Participant	-	-	-	-	\$ -	0%
Total Savings			6,489,099	1,265	283,161	\$ 14,099,594	100%
Homes Weatherized	Home	16,288					
Homes Treated							
- Single Family Homes Treated	Home	9,696					
- Multi-family Homes Treated	Home	10,942					
- Mobile Homes Treated	Home	289					
- Total Number of Homes Treated	Home	20,927					
# Eligible Homes to be Treated for PY⁴	Home	20,384					
% Of Homes Treated	%	103%					
- Total Master-Metered Homes Treated	Home	374					

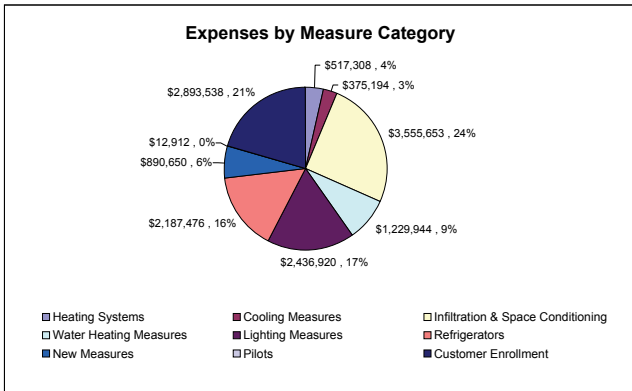
¹The energy savings for Exterior hard-wired CFL fixtures are included with the savings reported for CFLs.

²For the purchase of equipment only. No installations done in 2009.

³Expenditures in this category also includes the costs paid to the Outreach contractor for customers that were identified as unwilling or ineligible for the LIEE program.

⁴Based on Attachment H of D.08-11-031

PIE CHART 1- Expenses by Measures Category



**PY Low Income Energy Efficiency Annual Report
LIEE Table 3
LIEE COST-EFFECTIVENESS
San Diego Gas & Electric Company**

PY 2009 - 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
2009	0.54	0.42	0.83	(\$7,204,451)	(\$9,201,740)	(\$2,809,076)
2008	0.64	0.52	0.77	(\$6,120,166)	(\$8,121,185)	(\$4,070,011)
2007	0.41	0.32	0.62	(\$7,781,493)	(\$8,954,377)	(\$4,866,416)
2006	0.33	0.54	0.61	(\$9,883,548)	(\$6,602,546)	(\$5,837,643)
2005	0.45	0.70	0.99	(\$7,115,009)	(\$3,896,685)	(\$66,902)
2004	0.47	0.73	1.07	(\$7,584,889)	(\$3,905,982)	\$938,847
2003	0.47	0.66	1.01	(\$6,793,286)	(\$4,419,991)	\$122,456
2002	0.41	0.63	0.83	(\$7,298,174)	(\$4,597,814)	(\$2,053,787)

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 Low Income Energy Efficiency Annual Report
LIEE Table 4
LIEE PENETRATION
San Diego Gas & Electric Company

Customer	Housing Type	# Homes Treated	Current Year Penetration Rate for Homes Treated
Gas and Electric Customers			
Owners - Total		4,148	
	Single Family	3,629	
	Multi Family	287	
	Mobile Homes	232	
Renters - Total		16,240	
	Single Family	5,803	
	Multi Family	10,400	
	Mobile Homes	37	
Electric Customers (only)			
Owners - Total		178	
	Single Family	113	
	Multi Family	51	
	Mobile Homes	14	
Renters - Total		359	
	Single Family	150	
	Multi Family	204	
	Mobile Homes	5	
Gas Customers (only)			
Owners - Total		1	
	Single Family	-	
	Multi Family	-	
	Mobile Homes	1	
Renters - Total		1	
	Single Family	1	
	Multi Family	-	
	Mobile Homes	-	
Total Homes Treated in PY		20,927	
Total Homes Eligible in PY¹		20,384	103%

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	13,273	20,384	103%
2010				
2011				
2012				
2013				
2014				
2015				
2016				
2017				
2018				
2019				
2020				
Total Homes Treated since 2002	124,522	13,273		

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 & Unwilling in 2009.

Year	Utility in Shared Service Territory	Eligible Households in Shared Service Territory	Eligible households treated by both utilities in shared
2009	Southern California Gas Company	14,841	9

PY 2009 Low Income Energy Efficiency Annual Report
LIEE Table 5
LIEE Direct Purchases & Installation Contractors
San Diego Gas & Electric Company

Contractor	County ¹	Contractor Type				PY Annual Expenditures ²
		Private	CBO	WMDVBE	LIHEAP	
Contractor A	San Diego	x		x		\$ 1,910,237
Contractor C	San Diego		x	x	x	\$ 637,743
Contractor D	San Diego		x	x	x	\$ 672,610
Contractor E	San Diego	x				\$ 1,536,396
Contractor F	San Diego	x				\$ 159,044
Contractor H	San Diego	x		x		\$ 110,572
Contractor J	San Diego, Orange	x		x		\$ 7,161,285
Contractor K	San Diego	x				\$ -
Contractor L	San Diego	x				\$ 226,109
Contractor O	San Diego	x				\$ 31,255
Contractor Q	San Diego	x		x		\$ 1,605,951
Contractor S	San Diego					\$ -
Contractor T	San Diego, Orange					\$ 1,551
Contractor U	San Diego					\$ 33,929
Total Contractor Expenditures						\$ 14,086,682

¹County where contractor provides service.

²Expenditures in this category also includes the costs paid to the Outreach contractor for customers that were

PY Low Income Energy Efficiency Annual Report
LIEE Table 6
LIEE Installation Cost of Program Installation Contractors
San Diego Gas & Electric Company

	Unit of Measure	CBO/WMDVBE						Non-CBO/WMDVBE						2009 Program Total				
		Installations		Dwellings		Costs		Installations		Dwellings		Costs		Units Installed	Households	Costs	Cost/Unit	Cost/Household
		Units	%	Units	%	\$	%	Units	%	Units	%	\$	%					
Dwellings	Each	20,927	100%	20,927	100%	\$ 14,086,682	100%	-	0%	-	0%	\$ -	0%	20,927	20,927	\$ 14,086,682	\$ 673	\$ 673
Heating Systems																		
Furnaces	Each	1,491	86%	1,491	86%	\$ 171,506	33%	240	14%	240	14%	\$ 345,802	67%	1,731	1,731	\$ 517,308	\$ 299	\$ 299
Cooling Measures																		
A/C Replacement - Room	Each	408	100%	408	100%	\$ 359,954	100%	-	0%	-	0%	\$ -	0%	408	408	\$ 359,954	\$ 882	\$ 882
A/C Replacement - Central	Each	-	0%	-	0%	\$ -	0%	3	100%	3	100%	\$ 10,840	100%	3	3	\$ 10,840	\$ 3,613	\$ 3,613
A/C Tune-up - Central	Each	-	0%	-	0%	\$ -	0%	40	100%	40	100%	\$ 4,400	100%	40	40	\$ 4,400	\$ 110	\$ 110
A/C Services - Central	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	0	0	\$ -	\$ -	\$ -
Heat Pump	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	0	0	\$ -	\$ -	\$ -
Evaporative Coolers	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	0	0	\$ -	\$ -	\$ -
Evaporative Cooler Maintenance	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	0	0	\$ -	\$ -	\$ -
Infiltration & Space Conditioning																		
Envelope and Air Sealing Measures	Home	11,775	76%	11,775	76%	\$ 2,290,777	77%	3,670	24%	3,670	24%	\$ 691,805	23%	15,445	15,445	\$ 2,982,583	\$ 193	\$ 193
Duct Sealing ¹	Home	-	0%	-	0%	\$ -	0%	64	100%	64	100%	\$ 63,045	100%	64	64	\$ 63,045.00	\$ 985	\$ 985
Attic Insulation	Home	392	71%	392	71%	\$ 341,667	67%	162	29%	162	29%	\$ 168,358	33%	554	554	\$ 510,025	\$ 921	\$ 921
Water Heating Measures																		
Water Heater Conservation Measures	Home	12,418	76%	12,418	76%	\$ 918,574	77%	3,841	24%	3,841	24%	\$ 280,679	23%	16,259	16,259	\$ 1,199,254	\$ 74	\$ 74
Water Heater Replacement - Gas	Each	11	29%	11	29%	\$ 8,650	29%	27	71%	27	71%	\$ 21,240	71%	38	38	\$ 29,890	\$ 787	\$ 787
Water Heater Replacement - Electric	Each	-	0%	-	0%	\$ -	0%	1	100%	1	100%	\$ 800	100%	1	1	\$ 800	\$ 800	\$ 800
Tankless Water Heater - Gas	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	0	0	\$ -	\$ -	\$ -
Tankless Water Heater - Electric	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	0	0	\$ -	\$ -	\$ -
Lighting Measures																		
CFLs	Each	110,773	100%	110,773	100%	\$ 769,953	100%	241	0%	241	0%	\$ 1,638	0%	111,014	111,014	\$ 771,591	\$ 7	\$ 7
Interior Hard wired CFL fixtures	Each	8,951	75%	8,951	75%	\$ 652,409	75%	2,983	25%	2,983	25%	\$ 217,450	25%	11,934	11,934	\$ 869,859	\$ 73	\$ 73
Exterior Hard wired CFL fixtures	Each	2,220	75%	2,220	75%	\$ 118,850	75%	753	25%	753	25%	\$ 40,354	25%	2,973	2,973	\$ 159,204	\$ 54	\$ 54
Torchiere	Each	5,657	83%	5,657	83%	\$ 530,093	83%	1,133	17%	1,133	17%	\$ 106,174	17%	6,790	6,790	\$ 636,267	\$ 94	\$ 94
Refrigerators																		
Refrigerators - Primary ²	Each	2,321	100%	2,321	100%	\$ 2,136,055.94	98%	-	0%	-	0%	\$ 51,420	2%	2,321	2,321	\$ 2,187,476	\$ 942	\$ 942
Refrigerators - Secondary	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	0	0	\$ -	\$ -	\$ -
Pool Pumps																		
Pool Pumps	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	0	0	\$ -	\$ -	\$ -
New Measures																		
Forced Air Unit Standing Pilot Change Out	Each	177	95%	177	95%	\$ 48,808	95%	9	5%	9	5%	\$ 2,580	5%	186	186	\$ 51,388	\$ 276	\$ 276
Furnace Clean and Tune	Each	9,506	99%	9,506	99%	\$ 531,994	99%	60	1%	60	1%	\$ 3,360	1%	9,566	9,566	\$ 535,354	\$ 56	\$ 56
High Efficiency Clothes Washer	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	0	0	\$ -	\$ -	\$ -
Microwave	Each	265	100%	265	100%	\$ 22,260	100%	-	0%	-	0%	\$ -	0%	265	265	\$ 22,260	\$ 84	\$ 84
Thermostatic Shower Valve	Each	2,689	76%	2,689	76%	\$ 155,912	76%	856	24%	856	24%	\$ 49,639	24%	3,545	3,545	\$ 205,551	\$ 58	\$ 58
LED Night Lights	Each	28,667	100%	28,667	100%	\$ 75,968	100%	53	0%	53	0%	\$ 130	0%	28,720	28,720	\$ 76,097	\$ 3	\$ 3
Pilots																		
In-Home Display	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	0	0	\$ -	\$ -	\$ -
Programmable Controllable Thermostat	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	0	0	\$ -	\$ -	\$ -
Customer Enrollment																		
Outreach & Assessment ³	Home	20,792	100%	20,792	100%	\$ 2,476,774	100%	55	0%	55	0%	\$ 5,374	0%	20,847	20,847	\$ 2,482,148	\$ 119	\$ 119
In-Home Education	Home	20,718	100%	20,718	100%	\$ 410,270	100%	56	0%	56	0%	\$ 1,120	0%	20,774	20,774	\$ 411,390	\$ 20	\$ 20
Education Workshops	Participant	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	0	0	\$ -	\$ -	\$ -

¹Expenditures include Duct Testing.

²Expenditures include Home Grounding.

³Expenditures in this category also includes the costs paid to the Outreach contractor for customers that were identified as unwilling or ineligible for the LIEE program.

PY 2009 Low Income Energy Efficiency Annual Report
LIEE Table 7
Expenditures by Cost Elements
San Diego Gas & Electric Company

LIEE Program:	2009 Expenditures Recorded by Cost Element			
	Labor ¹	Non-Labor ²	Contract ³	Total
Energy Efficiency				
- Gas Appliances	\$ -	\$ -	\$ 1,282,051	\$ 1,282,051
- Electric Appliances	\$ -	\$ 4,370	\$ 4,786,453	\$ 4,790,823
- Weatherization	\$ -	\$ -	\$ 5,124,901	\$ 5,124,901
- Outreach and Assessment	\$ (1,833)	\$ 634	\$ 2,481,888	\$ 2,480,688
- In Home Energy Education	\$ (204)	\$ -	\$ 411,390	\$ 411,186
- Education Workshops	\$ -	\$ -	\$ -	\$ -
- Pilot	\$ -	\$ 12,912	\$ -	\$ 12,912
Energy Efficiency TOTAL	\$ (2,037)	\$ 17,917	\$ 14,086,682	\$ 14,102,562
Training Center	\$ -	\$ -	\$ -	\$ -
Inspections	\$ 41,209	\$ 564	\$ -	\$ 41,773
Marketing	\$ -	\$ 496,629	\$ -	\$ 496,629
M&E Studies	\$ -	\$ 30,159	\$ -	\$ 30,159
Regulatory Compliance	\$ 140,459	\$ 7,596	\$ -	\$ 148,055
General Administration	\$ 1,020,538	\$ 342,146	\$ -	\$ 1,362,684
CPUC Energy Division	\$ -	\$ 18,541	\$ -	\$ 18,541
TOTAL PROGRAM COSTS	\$ 1,200,169	\$ 913,552	\$ 14,086,682	\$ 16,200,403

¹Utility staff labor including labor indirects (vacation and sick leave, payroll taxes, and affiliate labor indirects)

²All other non-labor costs excluding contractor costs defined below.

³Expenses associated with contractor installations, Weatherization, Outreach and Assessment, and In Home Energy Education services.

**PY Low Income Energy Efficiency Annual Report
LIEE Table 8
Detail by Housing Type and Source
San Diego Gas & Electric Company**

Customer	Housing Type	2009 Energy Savings			2009 Expenses ¹	2009 Households Treated	2009 Households Eligible
		(mWh)	MW	(mTherm*)			
Gas and Electric Customers							
Owners - Total		4,423	0.36	34	\$ 4,361,888	4,148	
	Single Family	3,975	0.32	31	\$ 3,892,591	3,629	
	Multi Family	254	0.02	0	\$ 174,463	287	
	Mobile Homes	195	0.02	2	\$ 294,834	232	
Renters - Total		11,944	1.08	40	\$ 9,348,416	16,240	
	Single Family	5,202	0.43	34	\$ 4,490,265	5,803	
	Multi Family	6,710	0.65	6	\$ 4,831,554	10,400	
	Mobile Homes	32	0.00	0	\$ 26,597	37	
Electric Customers (only)							
Owners - Total		200		-	\$ 124,631	178	
	Single Family	141	0.01	-	\$ 92,948	113	
	Multi Family	46	0.00	-	\$ 25,138	51	
	Mobile Homes	12	0.00	-	\$ 6,544	14	
Renters - Total		336		-	\$ 237,246	359	
	Single Family	158	0.01	-	\$ 114,778	150	
	Multi Family	172	0.01	-	\$ 118,703	204	
	Mobile Homes	6	0.00	-	\$ 3,764	5	
Gas Customers (only)							
Owners - Total		-	-	-	\$ 115	1	
	Single Family	-	-	-	\$ -	-	
	Multi Family	-	-	-	\$ -	-	
	Mobile Homes	-	-	-	\$ 115	1	
Renters - Total		-	-	-	\$ 137	1	
	Single Family	-	-	-	\$ 137	1	
	Multi Family	-	-	-	\$ -	-	
	Mobile Homes	-	-	-	\$ -	-	
Total Homes Treated in PY		20,927					
Total Homes Eligible in PY²		20,384					

* Thousands of Therms

¹Excluding indirect program costs. Expenditures in this category does not include the costs paid to the Outreach contractor for customers that were identified as unwilling or ineligible for the LIEE program.

²Based on Attachment H of D.08-11-031

PY Low Income Energy Efficiency Annual Report
LIEE Table 9
Life Cycle Bill Savings by Measure
San Diego Gas & Electric

Measure Description	PY Number Installed	Per Measure Electric Impact - Average (kWh)	Per Measure Gas Impact - Average (Therms)	Effective Useful Life (EUL)	2009 Total Measure Life Cycle Bill Savings
Heating Systems					
Furnaces	1,725	-	2.15	13	17,978
Cooling Measures					
A/C Replacement - Room	408	52.93	-	15	27,125
A/C Replacement - Central	3	414.22	-	18	4,477
A/C Tune-up - Central	40	255.69	-	10	8,491
A/C Services - Central	-	-	-	-	-
Heat Pump	-	-	-	-	-
Evaporative Coolers	-	-	-	-	-
Evaporative Cooler Maintenance	-	-	-	-	-
Infiltration & Space Conditioning					
Envelope and Air Sealing Measures	15,400	54.46	3.18	5	278,884
Duct Sealing	64	233.02	19.00	25	17,326
Attic Insulation	554	136.89	34.12	25	304,577
Water Heating Measures					
Water Heater Conservation Measures	16,236	255.00	10.93	8	1,346,549
Water Heater Replacement - Gas	38	-	12.10	13	4,717
Water Heater Replacement - Electric	1	179.00	-	15	234
Tankless Water Heater - Gas	-	-	-	-	-
Tankless Water Heater - Electric	-	-	-	-	-
Lighting Measures					
CFLs	111,014	16.00	-	9	1,591,190
Interior Hard wired CFL fixtures	11,934	63.80	-	16	1,039,722
Exterior Hard wired CFL fixtures	2,973	16.00	-	9	**
Torchiere	6,790	191.00	-	9	1,161,476
Refrigerators					
Refrigerators -Primary	2,321	747.00	-	15	2,253,117
Refrigerators - Secondary	-	-	-	-	-
Pool Pumps					
Pool Pumps	-	-	-	-	-
New Measures					
Forced Air Unit Standing Pilot Change	186	-	42.00	18	99,184
Furnace Clean and Tune	9,566	-	2.15	13	123,388
High Efficiency Clothes Washer	-	-	-	-	-
Microwave	265	698.40	-	15	242,049
Thermostatic Shower Valve	3,545	399.00	13.60	10	322,304
LED Night Lights	28,720	10.22	-	9	262,871
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	20,927				
Life Cycle Bill Savings Per Home	435				

** Lifecycle Bill Savings for Exterior hardwired CFLs are included with CFLs.

PY Low Income Energy Efficiency Annual Report
LIEE Table 10
Energy Rate Used for Bill Savings Calculations
San Diego Gas & Electric

Year	\$/kWh [1]	\$/Therm
2009	0.1200	1.0400
2010	0.1236	1.0712
2011	0.1273	1.1033
2012	0.1311	1.1364
2013	0.1351	1.1705
2014	0.1391	1.2056
2015	0.1433	1.2418
2016	0.1476	1.2791
2017	0.1520	1.3174
2018	0.1566	1.3570
2019	0.1613	1.3977
2020	0.1661	1.4396
2021	0.1711	1.4828
2022	0.1762	1.5273
2023	0.1815	1.5731
2024	0.1870	1.6203
2025	0.1926	1.6689
2026	0.1983	1.7190
2027	0.2043	1.7705
2028	0.2104	1.8236
2029	0.2167	1.8784
2030	0.2232	1.9347
2031	0.2299	1.9927
2032	0.2368	2.0525
2033	0.2439	2.1141

[1] - for 2009 average cost per kWh paid by participants. Cost is escalated 3% annually in 24 subsequent years

PY Low Income Energy Efficiency Annual Report
LIEE 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
2007	\$ 11,983,364	\$ 6,631,660	0.55	\$ 507
2008	\$ 16,420,247	\$ 8,908,748	0.54	\$ 468
2009 ^[1]	\$ 16,200,403	\$ 9,105,659	0.56	\$ 435

^[1] - report activity for the 3 prior years

PY Low Income Energy Efficiency Annual Report
LIEE 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.) Targeted ^[1]	Total Residential Customers	Total Estimated Eligible	Total Treated 2002-2008	Total Treated This Year	Penetration Rate
91910-23	506	277	159	1	58%
91910-34	651	379	129	19	39%
91910-36	379	209	229	16	117%
91911-29	475	248	247	26	110%
91911-49	695	393	225	60	73%
91911-50	544	313	224	32	82%
91941-75	551	170	13	22	21%
91941-76	474	166	14	14	17%
91977-12	210	43	6	22	65%
91977-22	268	106	23	14	35%
91977-31	358	96	75	11	90%
91977-40	370	198	108	50	80%
91977-41	523	294	170	80	85%
92020-48	523	301	185	14	66%
92020-50	447	264	204	2	78%
92020-51	430	216	241	33	127%
92020-54	370	215	51	12	29%
92020-61	410	198	182	1	92%
92020-66	418	218	148	5	70%
92020-74	530	208	140	1	68%
92020-76	537	251	179	6	74%
92021-47	482	231	136	10	63%
92021-48	736	345	147	1	43%
92021-55	408	145	95	4	68%
92021-56	312	118	76	11	74%
92021-61	429	236	212	7	93%
92021-64	278	152	78	18	63%
92021-68	555	321	326	44	115%
92021-69	359	215	196	11	96%
92021-70	545	413	290	17	74%
92021-80	79	59	73	15	149%
92021-85	575	267	77	35	42%
92026-20	634	131	32	1	25%
92026-25	289	111	93	12	94%
92027-21	374	164	130	1	80%
92028-23	321	149	2	52	36%
92028-31	429	226	114	3	52%
92028-32	374	188	44	5	26%
92040-17	177	50	9	4	26%
92040-20	512	149	123	47	114%
92040-28	350	96	27	8	36%
92040-45	983	293	10	26	12%
92054-33	356	226	122	1	55%
92054-36	659	189	32	26	31%
92058-17	968	347	25	14	11%
92065-21	198	73	27	39	90%
92065-22	169	45	2	1	7%
92065-52	234	86	69	25	109%
92078-36	318	91	37	53	99%
92078-37	491	237	132	14	62%
92101-67	763	228	-	5	2%
92101-68	575	229	3	19	10%
92104-20	394	214	144	1	68%
92104-22	440	247	246	2	100%
92104-23	467	299	263	1	88%
92104-39	552	320	75	18	29%
92104-45	425	158	138	2	88%
92104-46	393	136	30	2	23%
92104-49	329	112	35	2	33%
92105-32	537	335	229	4	70%
92105-39	380	165	188	2	115%
92105-46	576	338	288	15	90%
92105-47	419	253	185	7	76%
92105-58	381	240	250	19	112%
92111-44	495	280	226	37	94%
92111-60	697	404	438	6	110%
92111-61	313	152	78	9	57%
92111-68	451	168	127	13	83%
92111-84	153	88	8	62	79%
92114-38	337	244	129	2	54%
92115-33	607	306	147	2	49%
92115-64	291	132	34	1	26%
92116-37	248	123	108	2	90%
92119-12	465	61	12	2	23%
92123-33	243	58	11	1	21%
92126-41	558	139	8	22	22%
92126-81	61	15	3	14	112%
92130-41	358	56	1	5	11%
92154-19	454	184	105	2	58%
92154-23	637	208	120	10	62%
92154-31	287	147	93	10	70%
92154-38	398	103	71	1	70%
92154-51	220	127	62	9	56%
92173-13	240	204	-	223	109%
92173-21	458	227	278	1	123%
92173-29	676	400	537	1	134%

^[1] Neighborhood defined as zip+7 area (or zip+2).

^[2] All active residential customers in zip+7.

^[3] Total estimated eligible per Athens Research. Calculated by multiplying the percent eligible by the total residential population in zip+7.

^[4] Total units treated 2002-2009.

PY Low Income Energy Efficiency Annual Report
LIEE Table 13
Categorical Enrollment
San Diego Gas & Electric

Type of Enrollment	Number of customers enrolled
Standard Enrollment	3,231
Categorical Eligibility	3,493
Self-Certification	14,158
Other*	45
Total number of customers enrolled	20,927

*80/20 qualified per section 2.2.6 of the California Statewide Policies and Procedures Manual.

PY Low Income Energy Efficiency Annual Report
LIEE Table 14
Leveraging
San Diego Gas & Electric Company

Partner	Relationship outside the IOU?	MOU Present?	Amount of Dollars Saved [1]	Amount of Energy Savings [2]	Other Measureable Benefits [2]	Enrollments Resulting from Leveraging Effort [3]	Meets all Criteria	If not, Explain
MAAC Project - LIHEAP	X	X	\$ -	-		-	No	No installations in PY2009.
Campeños Unidos Incorporated (CUI) - LIHEAP Provider	X	X	\$ -	-		-	No	No installations in PY2009.
CAPOC - LIHEAP Provider	X	X	\$ -	-		-	No	No installations in PY2009.

[1] Dollars saved. Leveraging efforts are measurable and quantifiable in terms of dollars saved by the IOU (Shared/contributed/donated resources, elimination of

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

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

PY Low Income Energy Efficiency Annual Report
LIEE Table 15
Integration
San Diego Gas & Electric Company

Integration Efforts				
Coordination Type	New Integration Efforts in PY 2009	Results		
		Cost and/or Resource Savings		
Interdepartmental, Program Coordination, Data Sharing, ME&O, etc.	[Brief description of effort]	Estimated \$ Savings	Methodology [1]	Other Results
Data Sharing	Marketing to customers enrolled in CARE and/or Medical Baseline.	N/A	N/A	
Interdepartmental	CARE/LIEE combined message in all marketing material.	N/A	N/A	
Program Coordination	Worked with California Solar Initiative (CSI).	N/A	N/A	

[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 Low Income Energy Efficiency Annual Report
LIEE Table 16
Lighting
San Diego Gas & Electric Company

LIEE Program CFL Tracking Table 1¹

Instructions: Please identify the CFL bulbs used within your LIEE 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
CFL:					
AMC Conservation	14-watt	1.99	4.91	6.9	Yes
AMC Conservation	23-watt	2.19	4.71	6.9	Yes
Twister	14-watt	1.09	5.81	6.9	Yes
T2 Mini Twister	23-watt	1.45	5.45	6.9	Yes
Autocell Electronics, Inc.	13 Watt - CFL	1.9	5	6.9	Yes
Autocell Electronics, Inc.	20 Watt - CFL	1.9	5	6.9	Yes
Autocell Electronics, Inc.	23 Watt - CFL	1.9	5	6.9	Yes
TCP	14 Watt - CFL	1.9	5	6.9	Yes
TCP	20 Watt - CFL	1.9	5	6.9	Yes
TCP	23 Watt - CFL	1.9	5	6.9	Yes
TCP	14-Watt	2.02	4.88	6.9	Yes
TCP	23- Watt	2.02	4.88	6.9	Yes
Lights of America	14-Watt	1.75	5.15	6.9	Yes
Lights of America	23-Watt Cfl	1.45	5.45	6.9	Yes
Lights of America	20-Watt	1.27	5.63	6.9	Yes
Lights of America	14-Watt	1.09	5.81	6.9	Yes
Springlite	18-Watt	1.87	5.03	6.9	Yes
Springlite	23-Watt	1.98	4.92	6.9	Yes
Hardwire:					
Lights of America	30-Watt/1950 Lumens	21.4	39.11	60.51	Yes
TCP 14" Hardwire	30-Watt	28.98	29.77	58.75	Yes
Custom Distributors	30-Watt	21.81	30.57	52.12	Yes
TCP	30-Watt	39.94	35	74.94	Yes
Maxlite Interior Hardwire	18-watt	22.51	36.24	58.75	Yes
Multi-purpose Ceiling Fixture	30-watt	12.2	48.31	60.51	Yes
Torchiere:					
ERI-TCP	70-Watt	29.95	40.11	70.06	Yes
Maxlite	70-Watt	35.45	50	85.45	Yes
Service Partners	70-Watt	34.48	43.34	77.82	Yes
Maxlite	70-Watt	39.5	38.32	77.82	Yes
Maxlite	70-Watt	32.95	44.87	77.82	Yes
Maxlite 3 Way Trochiere	18,26, 26-Watt	39.84	35.91	75.75	Yes
Porchlight:					
Contractor Supply	18-Watt	15.31	24.18	39.49	Yes
Maxlite	18-Watt	17.84	30	47.84	Yes
Service Partners	18-Watt	14.13	30.4	44.53	Yes
TCP	18-Watt	13.5	31.03	44.53	Yes
TCP	18-Watt	14.61	28.62	43.23	Yes
White Outdoor Pagoda Lamp	18-Watt1	13.15	31.38	44.53	Yes

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 LIEE Program	Number of Homes Provided CFLs	Avg. # of CFL bulbs given per home	Est. total energy savings from installed CFLs
2009	20,927	111,014	5.30	771,591
2010				
2011				

PY Low Income Energy Efficiency Annual Report
LIEE Table 17
Studies & Pilots Status
San Diego Gas & Electric Company

	PY Authorized Budget				PY Actual Expenses				% of Budget Spent ¹	% of Project Completed	On Schedule?	Energy Savings Measured ²
	2009	2010	2011	Total	2009 ²	2010	2011	Total				
Studies												
NEB	\$ 10,000	\$ 10,000	\$ 10,000	\$ 30,000	\$ 29,322	\$ -	\$ -	\$ 29,322	10%	10%	N	
2009 Process Evaluation	\$ 12,500	\$ 12,500	\$ 12,500	\$ 37,500	\$ -	\$ -	\$ -	\$ -	0%	0%	N ³	
Refrigerator Degradation	\$ 66,667	\$ -	\$ -	\$ 66,667	\$ -	\$ -	\$ -	\$ -	0%	0%	N ³	
Load Impact Evaluation ⁴	\$ -	\$ -	\$ 90,000	\$ 90,000	\$ -	\$ -	\$ -	\$ -	0%	25%	Y	
Pilots												
In Home Display	\$ -	\$ 145,000	\$ -	\$ 145,000	\$ 12,912	\$ -	\$ -	\$ 12,912	9%	6%	Y	
Programmable Controllable Thermostat	\$ -	\$ -	\$ 230,000	\$ 230,000	\$ -	\$ -	\$ -	\$ -	N/A	N/A	N/A	

¹ Authorized in D.08-11-031, Tables on p.142. Budget spent is based on total statewide budget.

² The NEB and Impact Evaluation Studies began in 2009. SDG&E is the lead utility on the NEB Study and paid the invoice(s) for 2009 activity. SCG paid its portion of the 2009 invoices through the affiliate billing order. SCE and PG&E will be crossed-billed for their portion of the invoices in 2010.

SCE is the payment administrator for the Impact Evaluation and did not cross-bill the joint utilities for the invoices received for the activities that occurred in 2009. Expenditure percentage is based on the total IOU Study authorized amount in Attachment J of D.08-11-031.

³ This study will occur in 2010.

⁴ The \$600,000 requested to conduct the Impact Evaluation was denied in the most recent Decision. The IOUs were directed by the Commission to utilize \$600,000 authorized in Decision 06-12-038 for this purpose.

PY Low Income Energy Efficiency Annual Report
LIEE Table 18
"Add Back" Measures
San Diego Gas & Electric

Measure	Climate Zone	Ratio of Benefits Over Costs			Quantity Installed	Budget Impact of "add Back" ¹	Energy Savings Impact (Lifecycle Bill Savings)
		Utility Cost Test	Modified Participant Test	Total Resource Cost Test			
furnace clean and tune,MF, cz10	10	0.00	0.00	0.00	1,226	\$ 56,825	0
furnace clean and tune,MF, cz7	7	0.00	0.00	0.00	1,778	\$ 82,410	0
Gas furnace repair/replace,gas,MF, cz10	10	0.00	0.00	0.00	160	\$ 246,085	0
Gas furnace repair/replace,gas,MF, cz7	7	0.00	0.00	0.00	218	\$ 335,291	0
Gas furnace repair/replace,gas,MH, cz10	10	0.03	0.03	0.02	41	\$ 63,059	1,296
Gas furnace repair/replace,gas,MH, cz15	15	0.02	0.02	0.01	1	\$ 1,538	19
Gas furnace repair/replace,gas,MH, cz7	7	0.03	0.03	0.02	19	\$ 29,223	501
Gas furnace repair/replace,gas,SF, cz10	10	0.02	0.02	0.01	215	\$ 330,676	3,561
Gas furnace repair/replace,gas,SF, cz7	7	0.01	0.01	0.01	881	\$ 1,355,004	12,602
Room AC, MF, cz10	10	0.07	0.04	0.06	281	\$ 263,381	11,025
Room AC, MH, cz10	10	0.18	0.12	0.16	8	\$ 7,498	847
Room AC, SF, cz10	10	0.21	0.14	0.19	119	\$ 111,539	15,252
Water heater repair/replace, gas	all	0.12	0.14	0.10	38	\$ 32,168	4,717

¹ Dollars spent on these Add Back Measures

PY Low Income Energy Efficiency Annual Report
LIEE Table 19
LIEE Fund Shifting
San Diego Gas & Electric

Program Year 2009	Total Authorized	Total Shifted ¹	% of Authorized Total ¹	Carried Forward/Carried Back ²	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	\$ 2,496,401	(\$1,115,501.04)	5%	N/A	From 2009 to 2009	\$1,043,786 from Gas Appliances to Weatherization and \$71,715 from Gas Appliances to Electric Appliances.	
- Electric Appliances	\$ 7,724,611	(\$71,715.13)	0%	N/A	From 2009 to 2009	\$71,715 from Electric Appliances to Outreach & Assessment	
- Weatherization	\$ 4,081,115	\$ 1,043,785.91	5%	N/A	From 2009 to 2009	\$1,043,786 from Gas Appliances to Weatherization	
- Outreach and Assessment	\$ 2,193,828	\$ 143,306.26	1%	N/A	From 2009 to 2009	\$71,715 from Electric Appliances to Outreach & Assessment and \$71,715 from Gas Appliances to Outreach & Assessment.	
- In Home Energy Education	\$ 1,431,670	\$ -	0%	N/A	N/A		
- Education Workshops	\$ -	\$ -	0%	N/A	N/A		
- Pilot	\$ 7,678	\$ -	0%	N/A	N/A		
Energy Efficiency TOTAL	\$ 17,935,303			N/A	N/A		
Training Center	\$ -				N/A		
Inspections	\$ 58,948	\$ -	0%	\$ 17,175	N/A		
Marketing	\$ 757,469	\$ -	0%	\$ 260,840	N/A		
M&E Studies	\$ 113,804	\$ -	0%	\$ 83,645	N/A		
Regulatory Compliance	\$ 271,439	\$ -	0%	\$ 123,384	N/A		
General Administration	\$ 2,002,097	\$ -	0%	\$ 639,413	N/A		
CPUC Energy Division	\$ 44,948	\$ -	0%	\$ 26,407	N/A		
TOTAL PROGRAM COSTS	\$ 21,184,008						

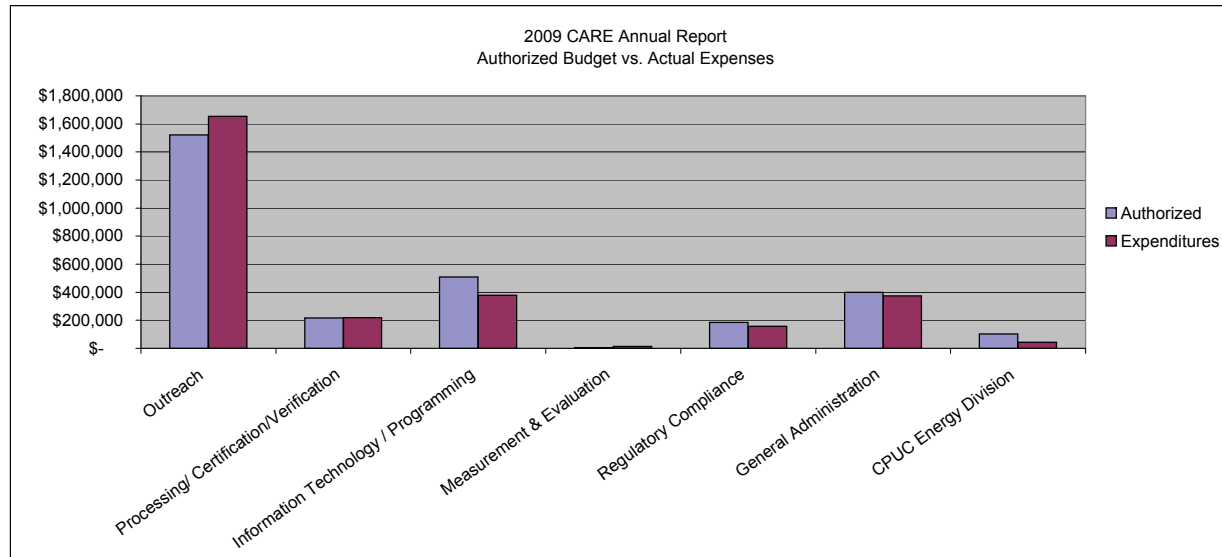
¹ Based on total authorized LIEE Program costs.

² Not Applicable. SDG&E used 2009 program funds.

2009 CARE Annual Report
CARE Table 1 - Overall Program Expenses
San Diego Gas & Electric

Standardized CARE Administrative Cost Reporting Categories							
2009 Costs by Energy Source							
Category	Residential		Expanded		Total	Authorized Budget	% Budget Spent
	Electric	Gas	Electric	Gas			
Outreach	\$1,284,578	\$369,315			\$1,653,893	\$1,520,638	109%
Automatic Enrollment							
Processing/ Certification/Verification	\$168,853	\$49,301			\$218,153	\$216,219	101%
Information Technology / Programming	\$295,831	\$82,088			\$377,919	\$508,795	74%
Pilots							0%
Measurement & Evaluation	\$10,742	\$3,030			\$13,772	\$4,000	344%
Regulatory Compliance	\$122,193	\$35,802			\$157,995	\$184,015	86%
General Administration	\$289,011	\$85,404			\$374,414	\$399,065	94%
CPUC Energy Division	\$33,311	\$9,951			\$43,262	\$102,900	42%
One E App							0%
TOTAL Program Costs	\$2,204,518	\$634,890	-	-	\$2,839,408	\$2,935,632	97%
CARE Rate Discount	\$38,288,995	\$9,697,918	\$1,258,370	\$279,734	\$49,525,017	\$47,026,184	105%
Service Establishment Charge Discount							
TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	\$40,493,513	\$10,332,808	\$1,258,370	\$279,734	\$52,364,425	\$49,961,816	105%

[1] Due to the relatively small dollar amount, SDG&E did not record the CARE expansion administrative and the subsidy costs separately from the regular CARE program costs.



2009 CARE Annual Report
CARE Table 2 - Enrollment, Recertification, Attrition, & Penetration
San Diego Gas & Electric

2009	Gross Enrollment											Attrition (Drop Offs)	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)		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						0	499	5,399	5,898	7,736	13,634	5,268	8,366	630	241,826	335,680	72.0%
February						0	312	6,190	6,502	7,218	13,720	5,132	8,588	1,370	243,196	335,680	72.4%
March						0	324	7,501	7,825	5,010	12,835	4,985	7,850	2,840	246,036	335,680	73.3%
April		325	7			332	592	6,669	7,593	6,358	13,951	4,772	9,179	2,821	248,857	335,680	74.1%
May		276	3			279	479	6,693	7,451	6,950	14,401	4,281	10,120	3,170	252,027	336,058	75.0%
June		165	2			167	416	6,844	7,427	7,309	14,736	6,231	8,505	1,196	253,223	336,058	75.4%
July		184	0			184	500	6,687	7,371	9,002	16,373	4,698	11,675	2,673	255,896	336,751	76.0%
August		188	0			188	499	5,939	6,626	6,451	13,077	4,574	8,503	2,052	257,948	336,751	76.6%
September		7	0			7	769	7,306	8,082	5,572	13,654	5,095	8,559	2,987	260,935	336,751	77.5%
October		427	2,745			3,172	376	5,491	9,039	7,145	16,184	4,590	11,594	4,449	265,384	336,751	78.8%
November		167	83			250	525	5,453	6,228	6,045	12,273	4,094	8,179	2,134	267,518	337,540	79.3%
December		518	0			518	810	6,181	7,509	7,963	15,472	5,510	9,962	1,999	269,517	337,540	79.8%
Total for 2009	0	2,257	2,840	0	0	5,097	6,101	76,353	87,551	82,759	170,310	59,230	111,080	28,321			

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

⁵ Not including Recertification.

2009 CARE Annual Report

CARE Table 4 - CARE Self-Certification and Self-Recertification Applications¹

San Diego Gas & Electric

	Provided	Received	Approved	Denied	Pending/Never Completed	Duplicates
Total	1,800,000	172,779	163,933	4,772	0	4,074
Percentage		9.6%	94.9%	2.8%	0.0%	2.4%

¹ Includes sub-metered customers.

2009 CARE Annual Report
CARE Table 5 - Enrollment by County
San Diego Gas & Electric

County	Estimated Eligible			Total Participants			Penetration Rate		
	Urban ¹	Rural ²	Total	Urban	Rural	Total	Urban	Rural	Total
Orange County	15,012		15,012	9,990		9,990	66.5%		66.5%
San Diego	305,529	16,999	322,528	249,752	9,775	259,527	81.7%	57.5%	80.5%
Total	320,541	16,999	337,540	259,742	9,775	269,517	81.0%	57.5%	79.8%

¹ "Rural" includes ZIP Codes classified as such by either the Rural Health Council or the Goldsmith modification that was developed to identify small towns and rural areas within large metropolitan counties. ZIP Codes not defined as rural are classified as urban.

2009 CARE Annual Report
CARE Table 6 - Recertification Results
San Diego Gas & Electric

2009	Total CARE Population	Participants Requested to Recertify	% of Population Total	Participants Recertified	Participants Dropped	Recertification Rate % (E/C)	% of Total Population Dropped (F/B)
January	241,826	4,242	1.75%	3,238	903	76.33%	0.37%
February	243,196	3,312	1.36%	2,352	795	71.01%	0.33%
March	246,036	3,665	1.49%	2,587	890	70.59%	0.36%
April	248,857	3,176	1.28%	2,234	823	70.34%	0.33%
May	252,057	2,419	0.96%	1,736	541	71.77%	0.21%
June	253,223	2,969	1.17%	2,227	650	75.01%	0.26%
July	255,896	2,084	0.81%	1,351	677	64.83%	0.26%
August	257,948	1,993	0.77%	1,201	674	60.26%	0.26%
September	260,935	2,330	0.89%	1,533	644	65.79%	0.25%
October	265,384	3,302	1.24%	2,320	926	70.26%	0.35%
November	267,518	2,694	1.01%	1,757	869	65.22%	0.32%
December	269,517	3,612	1.34%	2,184	1,215	60.47%	0.45%
Total for 2009							

2009 CARE Annual Report
CARE Table 7 - Capitation Contractors
San Diego Gas & Electric

Contractor Name	Contractor Type				Enrollments		
	Private	CBO	WMDVB E	LIHEAP	Rural	Urban	Total
AARP - Tax Aid		X				112	112
ACCESS TO INDEPENDENCE OF SAN DIEGO		X				4	4
AFE		X				0	0
AFRICAN ALLIANCE						158	158
ALPHA KAPPA ALPHA HEAD START		X				55	55
Alpha of San Diego		X				0	0
American Red Cross		X				1,277	1,277
Bayside Community Center		X				5	5
Barrio Station						1	1
BOYS AND GIRLS CLUBS		X				1	1
CAMPESINOS UNIDOS, INC		X		X		476	476
CASA FAMILIAR		X				62	62
Catholic Charities		X				222	222
CHICANO FEDERATION		X				2	2
CHINESE SERVICE CENTER OF SAN DIEGO		X				15	15
CHULA VISTA COMMUNITY COLLABORATIVE		X				37	37
CITY HEIGHTS COMMUNITY DEVELOPMENT CORP		X				4	4
CITY OF SAN DIEGO - Clairemont Community Center		X				1	1
COMMUNITY ACTION PARTNERSHIP - Orange County		X		X		6	6
Community Research Foundation		X				10	10
COMMUNITY RESOURCE CENTER						1	1
Crisis House		X				77	77
ELDER HELP OF SAN DIEGO 2009		X				14	14
EPISCOPAL COMMUNITY SERVICES		X				72	72
Family Health Centers of San Diego		X				34	34
Foster Lift		X				281	281
Harmonium		X				29	29
HEARTS AND HANDS TOGETHER		X				99	99
HOME START 2009		X				75	75
HORN OF AFRICA		X				9	9
INTERNATIONAL RESCUE COMMITTEE		X				57	57
Julian Pathways		X				0	0
KURISH HUMAN RIGHTS WATCH, INC						21	21
LA MAESTRA FAMILY CLINIC 2009		X				57	57
LEGAL AID SOCIETY OF SAN DIEGO, INC.		X				5	5
LUTHERAN SOCIAL SERVICES, INC		X				1	1
MAAC PROJECT		X		X		375	375
MABUHAY ALLIANCE						62	62
MID CITY CHRISTIAN SERVICES 2009		X	X			2	2
MONTE VISTA HIGH SCHOOL COMMUNITY RESOURCE CENTER		X				1	1
MOUNTAIN HEALTH & COMMUNITY SERVICES, INC.		X				10	10
Neighborhood Health Care		X				459	459
NEIGHBORHOOD HOUSE						48	48
North County Community Services		X				1	1
North County Health Project		X				119	119
North County Interfaith		X				17	17
REBUILDING TOGETHER SAN DIEGO		X				15	15
Salvation Army		X				137	137
San Diego Food Bank		X				2	2
San Diego State University		X				1,126	1,126
SAN DIEGO YOUTH & COMMUNITY SERVICES		X				3	3
San Ysidro Health Center		X				92	92
SAY SAN DIEGO		X				14	14
SCRIPPS HEALTH WIC						96	96
SOUTH BAY COMMUNITY SERVICES		X				21	21
TRINITY HOUSE						19	19
Turning the Hearts		X				4	4
Veteran's Village		X				1	1
Vista Community Clinic		X				92	92
YMCA YOUTH AND FAMILY SERVICES						90	90
Total Enrollments					0	6,086	6,086

2009 CARE Annual Report
CARE Table 8 - Participants per Month
San Diego Gas & Electric

2009	Gas and Electric	Gas Only	Electric Only	Total	Eligible Households	Penetration	% Change ¹
January	163,436	N/A	78,390	241,826	335,680	72%	
February	165,207	N/A	77,989	243,196	335,680	72%	0.57%
March	167,349	N/A	78,687	246,036	335,680	73%	1.17%
April	169,021	N/A	79,836	248,857	336,058	74%	1.03%
May	171,167	N/A	80,860	252,027	336,058	75%	1.27%
June	172,266	N/A	80,957	253,223	336,058	75%	0.47%
July	174,152	N/A	81,744	255,896	336,751	76%	0.85%
August	175,172	N/A	82,776	257,948	336,751	77%	0.80%
September	177,169	N/A	83,766	260,935	336,751	77%	1.16%
October	180,194	N/A	85,190	265,384	336,751	79%	1.71%
November	182,258	N/A	85,260	267,518	337,539	79%	0.57%
December	182,963	N/A	86,554	269,517	337,539	80%	0.75%
Total for 2009							

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

2009 CARE Annual Report
CARE Table 9 - Average Monthly Usage & Bill
San Diego Gas & Electric

Average Monthly Gas / Electric Usage			
Residential Non-CARE vs. CARE Customers ¹			
	Gas Therms	Gas Therms	
Customer	Tier 1	Tier 2	Total
Non-CARE	24	6	30
CARE	19	4	23
	Electric KWh	Electric KWh	
Customer	Tier 1	Tier 2	Total
Non-CARE	300	233	533
CARE	283	114	397

Average Monthly Gas / Electric Bill		
Residential Non-CARE vs. CARE Customers ¹		
(Dollars per Customer)		
Customer	Gas	Electric
Non-CARE	\$45.96	\$105.12
CARE	\$19.06	\$47.04

1 Excludes master-meter usage.

2009 CARE Annual Report
CARE Table 10- CARE Surcharge & Revenue
San Diego Gas & Electric

Electric					
CARE Surcharge and Revenue Collected by Customer Class					
Customer	Average Monthly		CARE Surcharge	Total CARE	Percentage of
				Surcharge Revenue	CARE Surcharge
Class	CARE Surcharge	Monthly Bill	as Percent of Bill	Collected	Revenue Collected
Residential*	\$1.25	\$102	1.20%	\$14,591,365	33%
Commercial	\$10.73	\$700	1.5%	\$18,460,310	42%
Agricultural	\$15.65	\$977	1.6%	\$722,717	2%
Large/Indust	\$1,249.25	\$48,730	2.6%	\$10,442,492	23%
Total				\$44,216,884	100%

* Excludes CARE customers

GAS					
CARE Surcharge and Revenue Collected by Customer Class					
Customer	Average Monthly		CARE Surcharge	Total CARE	Percentage of
				Surcharge Revenue	CARE Surcharge
Class	CARE Surcharge	Monthly Bill	as Percent of Bill	Collected	Revenue Collected
Residential	\$1	\$29	3%	\$6,240,868	48%
Commercial	\$14	\$317	4%	\$5,058,130	39%
Natural Gas Vehicle	\$1,128	\$16,051	7%	\$323,862	2.5%
Industrial	\$1,772	\$11,771	15%	\$1,266,057	10%
Total				\$12,888,917	100%

NOTES:

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

2009 CARE Annual Report
CARE Table 11 - CARE Capitation Applications
San Diego Gas & Electric

CARE Capitation Applications					
January 1, 2009 through December 31, 2009					
Entity	Total Received	Approved	Denied	Pending/ Never Completed	Duplicate
AARP - Tax Aid	421	381	34	-	6
ACCESS	1	1	-	-	-
ACCESS TO INDEPENDENCE OF SAN DIEGO	9	7	2	-	-
AFRICAN ALLIANCE	217	211	-	-	6
ALPHA KAPPA ALPHA HEAD START	144	130	7	-	7
ALPHA OF SAN DIEGO	1	1	-	-	-
American Red Cross	3,751	3,023	357	-	371
BARRIO STATION	21	19	-	-	2
BAYSIDE COMMUNITY CENTER	18	18	-	-	-
Boys and Girls Clubs	2	2	-	-	-
CAMPESINOS UNIDOS, INC	6,580	6,312	77	-	191
CASA FAMILIAR	372	310	21	-	41
Catholic Charities	948	786	51	-	111
CHICANO FEDERATION	16	15	1	-	-
CHINESE SERVICE CENTER OF SAN DIEGO	29	27	1	-	1
CHULA VISTA COMMUNITY COLLABORATIVE	121	97	13	-	11
CITY HEIGHTS COMMUNITY DEVELOPMENT CORP	8	8	-	-	-
CITY OF SAN DIEGO - Clairemont Community Center	4	4	-	-	-
COMMUNITY ACTION PARTNERSHIP - Orange County	12	10	-	-	2
COMMUNITY RESEARCH FOUNDATION	19	18	1	-	-
COMMUNITY RESOURCE CENTER	6	6	-	-	-
CRISIS HOUSE	164	152	7	-	5
ELDER HELP OF SAN DIEGO 2009	39	39	-	-	-
EPISCOPAL COMMUNITY SERVICES	291	220	28	-	43
FAITH BASED ORGANIZATIONS	1	1	-	-	-
Family Health	102	84	11	-	7
FOSTER LIFT	402	377	8	-	17
HARMONIUM 2009	145	124	5	-	16
HEARTS AND HANDS TOGETHER	354	325	20	-	9
HNSA Pubic Health Nurses	8	7	1	-	-
HOME START 2009	358	302	30	-	26
HORN OF AFRICA	85	77	-	-	8
INTERNATIONAL RESCUE COMMITTEE	175	159	7	-	9
KURISH HUMAN RIGHTS WATCH, INC	39	38	-	-	1
La Maestra	255	227	9	-	19
LEGAL AID SOCIETY OF SAN DIEGO, INC.	17	15	1	-	1
LUTHERAN SOCIAL SERVICES, INC	13	11	1	-	1
MAAC PROJECT	798	736	35	-	27
MABUHAY ALLIANCE	168	149	12	-	7
MAXIMUS	215	155	30	-	30
MID CITY CHRISTIAN SERVICES 2009	3	3	-	-	-
MONTE VISTA HIGH SCHOOL COMMUNITY RESOURCE CENTER	2	2	-	-	-
MOUNTAIN HEALTH & COMMUNITY SERVICES, INC.	19	15	2	-	2
Neighborhood Health Care	1,366	1,241	64	-	61
NEIGHBORHOOD HOUSE	196	174	11	-	11
NORTH COUNTY COMMUNITY SERVICES - FOOD BANK	2	2	-	-	-
North County Health Project	316	283	18	-	15
North County Interfaith	28	26	2	-	-
REBUILDING TOGETHER SAN DIEGO	86	60	9	-	17
Salvation Army	699	637	16	-	46
SAN DIEGO FOOD BANK	2	2	-	-	-
SAN DIEGO YOUTH & COMMUNITY SERVICES	8	7	-	-	1
San Ysidro Health	411	338	25	-	48
SAY SAN DIEGO	44	31	5	-	8
Scripps Health	359	318	13	-	28
SDSU	3,263	2,757	250	-	256
SOUTH BAY COMMUNITY SERVICES	78	70	2	-	6
TRINITY HOUSE	107	106	1	-	-
TURNING THE HEARTS	25	21	2	-	2
VETERANS VILLAGE OF SAN DIEGO	1	1	-	-	-
VISTA COMMUNITY CLINIC	251	229	13	-	9
WOMEN'S RESOURCE CENTER	2	2	-	-	-
YMCA	481	457	8	-	16
YMCA YOUTH AND FAMILY SERVICES	22	20	1	-	1
Total	24,100	21,386	1,212	-	1,502

**2009 CARE Annual Report
 CARE Table 12 - CARE Expansion Program
 San Diego Gas & Electric**

CARE Expansion Program						
2009	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	386	147	533	577	243	820
February	383	147	530	574	242	816
March	383	147	530	572	242	814
April	381	147	528	570	241	811
May	381	148	528	569	242	811
June	372	148	520	567	242	809
July	372	148	520	568	242	810
August	361	148	509	558	241	799
September	361	147	509	558	241	799
October	361	147	508	558	239	797
November	353	147	500	546	239	785
December	349	147	496	541	239	780

CARE Expansion Program		
Average Monthly Gas / Electric Usage ¹		
	Gas	Electric
Customer	Therms	KWh
Residential Facilities	62	502
Commercial Facilities	397	7,716

¹ Excludes master meter usage.

CARE Expansion Program					
CARE Expansion Self-Certification and Self-Recertification Applications					
	Received	Approved	Denied	Pending/Never Completed	Duplicates
Total	4	4	0	0	0
Percentage		100%	0%	0%	0%

2009 CARE Annual Report
CARE Table 13 - Fund Shifting
San Diego Gas & Electric

CARE Program Fund Shifting by Category 2009				
Program Year: 2009	Total Authorized	Total Shifted ¹	% of Authorized Total	Shifted to/from?
Outreach	\$ 1,520,638	\$ 133,255	9%	Information Technology and Outreach
Processing, Certification, and Verification	\$ 216,219	\$ 2,034	1%	General Admin
Information Tech./Programming	\$ 508,795	\$ (130,876)	-26%	To Outreach
Pilots	\$ -	\$ -	0%	
Measurement and Evaluation	\$ 4,000	\$ 9,772	244%	
Regulatory Compliance	\$ 184,015	\$ -	0%	
General Administration	\$ 399,065	\$ (14,185)	-4%	To Outreach & Processing
CPUC Energy Division Staff	\$ 102,900	\$ -	0%	
Cooling Centers	\$ -	\$ -	0%	
Total Expenses	\$ 2,935,632	\$ -		
Subsidies and benefits	\$ 52,364,425	\$ -		
Total Program Costs and Discounts				

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

CERTIFICATE OF SERVICE

I hereby certify that a copy of **ANNUAL REPORT ACTIVITY OF SAN DIEGO GAS & ELECTRIC COMPANY (U 902 M) ON LOW INCOME ASSISTANCE PROGRAMS FOR 2009** has been electronically mailed to each party of record of the service list in A.08-05-022, A.08-05-024, A.08-05-025, and A.08-05-026. Any party on the service list who has not provided an electronic mail address was served by placing copies in properly addressed and sealed envelopes and by depositing such envelopes in the United States Mail with first-class postage prepaid.

Copies were also sent via Federal Express to the assigned Administrative Law Judges and Commissioner.

Executed this 03rd day of May, 2010 at San Diego, California.

 /s/ Jenny Norin
Jenny Norin