

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

Application of San Diego Gas & Electric
Company (U902M) for Approval of Low
Income Assistance Programs and Budgets
for Program Years 2015-2017.

Application 14-11-_____
(Filed November 18, 2014)

**APPLICATION OF SAN DIEGO GAS & ELECTRIC COMPANY
FOR APPROVAL OF LOW-INCOME ASSISTANCE PROGRAMS
AND BUDGETS FOR PROGRAM YEARS 2015-2017**

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I. INTRODUCTION

In accordance with Rule 15 of the California Public Utilities Commission's ("Commission") Rules of Practice and Procedure and Decision ("D.") 14-08-030,¹ San Diego Gas & Electric Company ("SDG&E") hereby submits its Application for Approval of Low Income Assistance Programs and Budgets for PY2015-2017 ("Application").

D.14-08-030 directed the IOUs to file 2015-2017 Applications for approval of their Energy Savings Assistance ("ESA") Program and California Alternate Rates for Energy ("CARE") Program by November 18, 2014.² This filing consists of the Application, prepared direct testimony in support of the Application, supporting Attachments required by the Guidance Document, and supporting Appendices. The prepared direct testimony is served concurrently herewith, incorporated in the Application by reference, and summarized below in Section III.

¹ D.14-08-030 directed SDG&E, Southern California Gas Company ("SoCalGas"), Pacific Gas & Electric Company ("PG&E"), and Southern California Edison Company ("SCE") (collectively, the investor-owned utilities ("IOUs")) to file applications for Commission approval of their low-income assistance programs and budgets for program years ("PY") 2015-2017 by November 18, 2014. D.14-08-030 also instructed the IOUs to use Attachment Q (the "Guidance Document") the framework and templates for their PY2015-2017 low-income assistance program applications. D.14-08-030, at Ordering Paragraph ("OP") 60.

² D.14-08-030, at p. 90.

II. SUMMARY OF REQUESTS

In this Application, SDG&E presents proposals to improve upon its ESA Program and CARE Program.³ These proposals include strategies, plans, activities, measures, policies, and budgets designed to increase the programs' enrollment and overall delivery, as well as help customers reduce their energy bills, promote energy conservation, and assist customers avoid service disconnections. In PY2015-2017, SDG&E will continue its commitment to provide program and services designed to meet the needs of its low-income and special needs customers, those with limited English proficiency, and those living in underserved or hard-to-reach communities who may benefit from SDG&E's Customer Assistance programs.

III. OVERVIEW OF TESTIMONY

SDG&E used the Guidance Document as the framework and template for the prepared direct testimony, which is comprised of the following sections.

Section I, sponsored by Mr. Alex Kim, Director of Residential Services, addresses Section I of the Guidance Document (Summary and Overview of the ESA and CARE Programs and Budgets Application for the PY2015-2017).

Section II, sponsored by Ms. Sandra Williams Prepared Direct Testimony, Customer Assistance Manager, and Mr. Horace Tantum IV, Residential Marketing Manager, addresses Section II of the Guidance Document (ESA Program and Budgets Application for PY2015-2017). Ms. Sandra William's Prepared Direct Testimony' testimony sponsors the operational elements of SDG&E's ESA Program requests, while Mr. Tantum's testimony sponsors the marketing and outreach elements of SDG&E's ESA Program requests.

Section III, sponsored by Ms. Sandra Williams' Prepared Direct Testimony and Mr.

³ The ESA Program and CARE Program are statutorily-established programs that serve low-income households with an annual income at or below 200% of the Federal Poverty Guidelines.

Horace Tantum IV, Residential Marketing Manager addresses Section III of the Guidance Document (CARE Program and Budgets Application for PY2015-2017). Ms. William's Prepared Direct Testimony' testimony sponsors the operational elements of SDG&E's CARE Program requests, while Mr. Tantum's testimony sponsors the marketing and outreach elements of SDG&E's CARE Program requests.

IV. ESA PROGRAM

A. Summary of Requests

In this Application, SDG&E requests Commission approval of SDG&E's proposed ESA Program plans for PY2015-2017. SDG&E proposes to make improvements on many of the existing strategies developed over the past several years. In addition, SDG&E proposes the following new program changes: 1) enhancements and measures to respond to the Governor's drought emergency directive; 2) a new contractor training program; 3) modifications to the unwillingness factor; 4) a return to the 10-Year Go-Back Rule; 5) new coordination with the California Lifeline and Covered California Programs, and other utility and state-funded assistance programs; 6) implementation of two behavioral approaches to aid customers in conserving energy; 7) improved efforts to identify and target customer segments which have historically been hard-to-reach; and 8) other requests as described herein and in the supporting prepared direct testimony.

SDG&E plans to treat a total of 20,316 homes per year, which totals 60,984 homes for PY2015-2017.⁴

The Commission authorized SDG&E a PY2015 ESA Program budget of \$23,772,250.⁵ To fund PY2016-2017 ESA Program activities, SDG&E requests a total annual budget of

⁴ Prepared Direct Testimony of SDG&E ESA Program witnesses Sandra Williams and Horace Tantum IV, at p. 2.

⁵ D.14-08-030, OP 2(b).

\$30,649,504 for 2016 and \$31,631,922 for 2017.⁶

B. Background

1. ESA Program Evolution

The ESA Program has offered energy saving and no cost home improvements to income-qualified customers since the early 1980's. The ESA Program is ratepayer funded through the Public Goods Charge and is available to residential customers living in all housing types (single family, multi-family, and mobile homes), and is applicable to homeowners or renters. Historically, the ESA Program has been primarily designed to meet the Commission's equity objectives of assisting customers who are highly unlikely or unable to participate in other residential programs.⁷ Over time, however, the focus of the ESA Program has evolved to include other goals for the program.

For instance, 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"⁸, the Commission in D.07-12-051 updated its policy objectives for the ESA Program to make the ESA Program a reliable energy resource for the State of California and provide cost-effective energy savings that serve as an energy resource and to promote environmental benefits. To achieve these objectives, the Commission adopted an ESA Program programmatic initiative "to provide all eligible [ESA] customers the opportunity to participate in [ESA] programs and to offer those who wish to participate in all cost effective energy efficiency measures in their residences by 2020." In July 2008, Commission Staff issued the California Energy Efficiency Strategic Plan ("CEESP"), which provides program guidance to the utilities. The CEESP is designed to increase the

⁶ Prepared Direct Testimony of SDG&E ESA Program witnesses Sandra Williams and Horace Tantum IV, at p. 2.

⁷ D.94-10-059, at p. 119.

⁸ D.07-12-051, at p. 3.

opportunities for program participation and energy savings; improve leveraging and integration efforts; improve the ESA Program workforce training requirements so as to facilitate participation of minority and other disadvantaged communities; emphasize long term and enduring energy savings; and organize program marketing, education, and outreach (“ME&O”) that is consistent with CEESP strategies.⁹

2. ESA Program Eligibility Guidelines

The ESA Program eligibility guidelines are based on several factors for participation, which include: 1) household income eligibility; 2) the utility fuel provided to the dwelling; 3) structural feasibility; 4) landlord approval; 5) previous program service at the dwelling; and 6) the need for energy efficient measures offered through the ESA Program.¹⁰

For purposes of determining ESA Program income eligibility, all income is considered from all household members, including (but not limited to) wages, salaries, interest, dividends, child support, spousal support, disability or veterans’ benefits, rental income, social security, pensions, and all social welfare program benefits before deductions are made. Customers enrolling in the program are required to provide documentation of income. The total household income must be equal to or less than 200% of the Federal Poverty Guidelines, with income adjustments for family size, as set forth by the Commission. Customers may be eligible to participate under categorical eligibility and can be automatically enrolled in the ESA Program based on their current participation in certain local, state, or federal means-tested programs.¹¹

⁹ In January 2011, the CEESP was updated to include an energy efficient lighting chapter because lighting comprises approximately one-fourth of the electricity use in California. The CEESP established lighting goals that are applicable to three market sectors: residential, nonresidential, and exterior lighting.

California AB1109 will phase out traditional, low efficiency incandescent lamps by 2018.

¹⁰ Prepared Direct Testimony of SDG&E ESA Program witnesses Sandra Williams and Horace Tatum IV, at p. 6.

¹¹ Prepared Direct Testimony of SDG&E ESA Program witnesses Sandra Williams and Horace Tatum IV, at p. 6.

Customers may also be eligible to participate in the ESA Program through self-certification. Self-certification is permitted in certain geographic areas where 80% of the customers are likely to be at or below current ESA Program income guidelines.¹² Customers enrolling in the program through self-certification must sign a “self-certification statement,” certifying that the household meets the current income guidelines.

In addition, customers may also be eligible to enroll in the ESA Program if they have been income-qualified through the CARE program’s random post-enrollment verification (“PEV”) process. In this case, the utility requests income documentation from the CARE participant which demonstrates that the customer meets the income guidelines for participation in the CARE program, and as such, the CARE customer is also income verified and is eligible to participate in the ESA Program.

C. ESA Program Homes Treated Goals

In D.08-11-031, the Commission established a methodology to estimate the remaining eligible number of customers to be treated in order to meet the programmatic initiative of treating all eligible and willing customers by the year 2020. The methodology consists of the following steps:

1. Use the estimated number of income eligible households based on the estimates submitted in the utilities’ annual Estimated Eligibility Updates.
2. Add a 1% annual growth factor accounting for population growth and economic

¹² Customers enrolling in the ESA Program through categorical eligibility are required to show documentation to reflect current participation in one of the following public assistance programs adopted by the Commission in D.08-11-031: Bureau of Indian Affairs General Assistance, CalFresh/Supplemental Nutrition Assistance Program (“SNAP”), CalWORKs/Temporary Assistance for Needy Families (“TANF”), Head Start Income Eligible (Tribal Only), Low-Income Home Energy Assistance Program (“LIHEAP”), Medicaid/Medi-Cal for Families A & B, National School Lunch Program (“NSLP”), Supplemental Security Income (“SSI”), Tribal TANF, or the Women, Infants, and Children Program (“WIC”).

conditions.

3. Deduct the estimated number of households “unwilling to participate” in the program.¹³
4. Deduct the number of homes treated by the ESA Program between 2002 through year-end of the most current program year completed.
5. Deduct the projected number of homes treated by the Energy Savings Assistance Program for the current program year.
6. Deduct the number of homes treated by the LIHEAP program between 2002 through year-end of the most current year completed.
7. Multiply the result by 25% to determine the estimated number of homes to be treated in the next program cycle.¹⁴

1. Proposed Modification to the Unwillingness Factor¹⁵

In Application (“A.”) 11-05-017, SDG&E requested authorization to increase the “unwillingness factor” from 5 percent to 15 percent based on actual results from tracked customer responses.¹⁶ SDG&E also proposed to modify the “unwillingness factor” to include the number of customers found to be “ineligible” because SDG&E had more precise information on which to base its “unwillingness” factor.¹⁷ The Commission in D.08-11-031 determined that it had insufficient data to modify the “unwillingness” factor. Nevertheless, the Commission indicated that the 2013 LINA Study would provide insight regarding any potential changes to the

¹³ D.08-11-031 used the entire eligible population as a basis and a factor of 5% to estimate unwilling households.

¹⁴ See D.08-11-031, at pp. 108-114.

¹⁵ The unwillingness factor is the estimated number of eligible ESA Program customers who are unwilling or unable to enroll in the ESA Program.

¹⁶ SDG&E tracked over 38,000 customer leads that were contacted by the ESA Program to determine the number of customers who were unwilling or ineligible to participate in the program.

¹⁷ In D.08-11-031, at p. 10, the Commission stated that future estimates of “unwillingness” calculations may be more precise and may be considered in the 2012-2014 program cycle.

unwillingness factor.¹⁸

As discussed in SDG&E’s prepared direct testimony, SDG&E proposes to modify the unwillingness factor based on the recommendations of the LINA Study. SDG&E proposes to change the estimated unwillingness factor to 19 percent, so as to more accurately represent the percentage of customers in SDG&E’s service territory that are not willing to participate in the program.¹⁹

2. ESA Program Eligible Population²⁰

Based on the modified unwillingness factor of 19 percent, SDG&E estimates that there are 70,381 eligible and willing households in SDG&E’s service territory remaining to be treated by 2020. SDG&E proposes to annually treat 60,948 customers during the 2015 to 2017 program cycle.

Table 1: Households to Be Served in PY2015-2017

Program Year	Units
2015	20,316
2016	20,316
2017	20,316

D. Program Delivery²¹

SDG&E’s ESA Program is implemented through private contractors and CBOs. These licensed contractors are responsible for outreach and assessment, weatherization services, HVAC (Heating, ventilating, and air conditioning) services, and appliance installations.

¹⁸ D.12-08-044, at p. 264. In addition, OP 109 (c) outlined requirements for the Needs Assessment Report to determine the “unwillingness” and remaining population for the CARE and ESA Program.

¹⁹ Prepared Direct Testimony of SDG&E ESA Program witnesses Sandra Williams and Horace Tatum IV, at pp. 18-21.

²⁰ Prepared Direct Testimony of SDG&E ESA Program witnesses Sandra Williams and Horace Tatum IV, at p. 7.

²¹ Prepared Direct Testimony of SDG&E ESA Program witnesses Sandra Williams and Horace Tatum IV, at pp. 27-30.

Third party contractors are used for marketing activities, market research, and door-to-door outreach.

1. Program Approach and Design

During the 2015-2017 program cycle, SDG&E plans to continue with its existing program approach and design strategies which include outreach and assessment, enrollment, energy education, measure installation, and inspections of installations and services performed. These program approaches and design strategies are briefly described below.

a. Outreach

For the 2015-2017 program cycle, SDG&E anticipates its outreach and assessment to be provided by several contractors. These outreach and assessment contractors will be the key to SDG&E's success in enrolling qualified customers into the ESA Program by conducting door to door canvassing in conjunction with marketing efforts provided by SDG&E. In addition, SDG&E plans to continue working with contractors in allocating assigned regions, which minimizes drive time, reduces greenhouse gas emissions, and increases efficiencies in the installation and delivery of services to customers.

b. Enrollment

During the 2015-2017 program cycle, SDG&E plans to continue its existing enrollment process which includes determining customer income eligibility, performing an in-home assessment (including structural feasibility), and delivering energy education. Customers can qualify for the program through targeted self-certification, categorical eligibility, CARE post enrollment verification, or by providing full income documentation. Once customers are determined to be eligible, the outreach contractor provides an in-home assessment to determine all feasible measures for installation. In addition, customers will be provided with energy and

water conservation education that is customized to produce the most benefit and value based on energy consumption and customer behavior.

c. Measure Installation

SDG&E plans to continue its existing policy by offering all feasible measures to qualified and eligible dwellings. These measure installations will be performed by licensed contractors participating in the ESA Program. The installation contractors will be responsible for contacting and scheduling appointments with qualified customers to install measures in accordance with the P&P Manual, the California Installation Standards, and government regulations.

d. Inspections

During the 2015-2017 program cycle, SDG&E plans to continue utilizing its in house inspection personnel to perform program inspections for the ESA Program and Energy Efficiency programs. SDG&E's ability to utilize its inspection personnel has worked effectively and efficiently in providing quality assurance of work performed by installation contractors and it produces cost savings between programs and provides a higher level of customer service.

SDG&E also proposes to expand its inspection workforce by utilizing a third party contractor to perform inspections of the installation of mandatory and non-mandatory measures. This change is being requested as an effort to minimize the number of customer visits.

2. Program Portfolio²²

a. Existing Program Measures to Be Continued

The table below reflects the measures that are currently offered through the ESA program as well as those measures SDG&E requests to be added to its mix of measures offered through

²² Prepared Direct Testimony of SDG&E ESA Program witnesses Sandra Williams and Horace Tatum IV, at pp. 30-31.

the program.

Table 2 – ESA Program Measures

Existing Program Measures	Proposed New Program Measures
Appliances	Appliances
High Efficiency Clothes Washer	
Refrigerators	
Microwaves	
Domestic Hot Water	Domestic Hot Water
Water Heater Blanket	Combined Showerhead/TSV
Low Flow ShowerHead	Heat Pump Water Heater
Water Heater Pipe Insulation	Tub Diverter
Faucet Aerator	
Water Heater Repair/Replacement	
Thermostatic Shower Valve	
Enclosure	Enclosure
Air Sealing	
Attic Insulation	
HVAC	HVAC
FAU Standing Pilot Light Conversion	Energy Efficient Fan Control
Furnace Repair/Replacement	
Room A/C Replacement	
Duct Testing and Sealing	
Maintenance	Maintenance
Furnace Clean and Tune	
Central A/C Tune-up	
Lighting	Lighting
Compact Fluorescent Lights (CFLs)	LED Diffuse Bulb (60W Replace)
Interior Hard wired CFL fixtures	LED Reflector Bulb (BR30 Recessed Can)
Exterior Hard wired CFL fixtures	
Torchiere	
LED Night Lights	
Miscellaneous	Miscellaneous
Smart Strip	

b. Proposed New Program Measures²³

SDG&E proposes to add the following new measures to its ESA Program portfolio.

²³ Prepared Direct Testimony of SDG&E ESA Program witnesses Sandra Williams and Horace Tantum IV, at p. 31.

Table 3: Proposed New Measures

Measure	Benefit(s)
Heat pump water heater	Energy savings
Efficient fan controller	Energy savings
Combined showerhead & thermostatic shower valve	Energy savings, water savings
Tub diverter	Energy savings, water savings
LED reflector bulb	Energy savings
LED diffuse bulb	Energy savings

c. Existing Program Measures to Be Retired²⁴

SDG&E does not propose to retire any measures for PY2015-2017.

3. Incorporation of Studies

Based on the findings of ESA Program studies, SDG&E proposes to adopt the following recommendations:

a. Energy Education Study²⁵

Based on findings of the Energy Education Study, SDG&E proposes to implement a Contractor Training Program that will focus on providing standardized training to residential outreach specialists (“ROS”) across the IOUs by providing consistent and rigorous training for new assessors and refresher training for existing assessors. SDG&E also proposes to provide customized Energy Education based on usage level, household size, and whether there are children or seniors in the home.

In addition, although SDG&E’s Customer Experience post-enrollment customer survey already includes questions regarding energy education, SDG&E proposes to augment the survey to include specific questions to test retention of information provided by assessor.

²⁴ Prepared Direct Testimony of SDG&E ESA Program witnesses Sandra Williams and Horace Tatum IV, at p. 88.

²⁵ Prepared Direct Testimony of SDG&E ESA Program witnesses Sandra Williams and Horace Tatum IV, at p. 9.

b. Multi-Family Segment Study²⁶

Based on the recommendations of the Multi-Family Segment Study, SDG&E plans to offer a single point of contact to better integrate the ESA Program with Middle Income Direct Install (MIDI), Multi-Family Energy Efficiency Rebate (“MFEER”) and Energy Upgrade California (“EUC”). In addition, to overcome participation barriers by renters, SDG&E proposes to offer “simple” measures²⁷ during enrollment which consist of basic measures that do not affect the dwelling structure and can be installed without landlord authorization. Installation of these “simple” measures during enrollment will reduce the number of visits.

c. Mid-Cycle Working Group²⁸

Based on the findings of the Mid-Cycle Working Group Report, SDG&E recommends to increase the cost caps on several Minor Home Repairs. SDG&E proposes that the cap to replace central furnaces increase from \$2,000 to \$2,500. SDG&E proposes that the cap to replace wall/floor/direct vent furnaces be increased from \$1,500 to \$2,000. SDG&E proposes that the cap to repair and replace water heaters should increase from \$1,250 to \$1,400. SDG&E proposes that the water heater repairs and replacements average cost per home receiving service should increase from \$900 to \$1,000. SDG&E also proposes that the total of all minor home repairs should increase from \$2,500 to \$3,000.

²⁶ Prepared Direct Testimony of SDG&E ESA Program witnesses Sandra Williams and Horace Tantum IV, at p. 21.

²⁷ These measures include compact fluorescent lights (“CFL”), Light-emitting diode (“LED”) night lights, faucet aerators, smart strips, torchiere lamps, and microwaves.

²⁸ Prepared Direct Testimony of SDG&E ESA Program witnesses Sandra Williams and Horace Tantum IV, at pp. 11-12.

4. Leveraging²⁹

a. Existing Leveraging Activities to Be Continued

For PY2015-2017, SDG&E's ESA Program will continue and expand efforts to coordinate activities with other utility and state-administered customer assistance programs, so as to increase program enrollment. SDG&E will continue to coordinate data sharing efforts with SoCalGas, and California American Water. SDG&E will continue to work with its CBO network and the Low Income Home Energy Assistance Program ("LIHEAP") contractors to reach customers who may not have responded to other channels of marketing or for various reasons had reservations about enrolling in the ESA Program. SDG&E also will continue its partnership with Metropolitan Area Advisory Committee ("MAAC"), a LIHEAP contractor to enroll customers who attend its "Budget Management" workshops.

Likewise, SDG&E will continue leveraging the services of an outside contractor to develop and implement a grassroots leveraging program to target tribal communities. The contractor will work with the network of organizations to ensure they have knowledge of SDG&E's ESA Program in order to outreach to customers and educate them about the program's value.

b. New Leveraging Activities³⁰

SDG&E has identified 37 organizations which include CBOs, tribal organizations, and other public and private organizations that work in conjunction with the California Lifeline and/or the Covered California agencies. SDG&E will employ California CBOs to deliver ESA Program applications and materials. SDG&E plans to use the services of an outside contractor to

²⁹ Prepared Direct Testimony of SDG&E ESA Program witnesses Sandra Williams and Horace Tatum IV, at pp. 32-33.

³⁰ Prepared Direct Testimony of SDG&E ESA Program witnesses Sandra Williams and Horace Tatum IV, at p. 42-44.

develop and implement a grassroots leveraging program. The contractor will work with the network of organizations to ensure they have sufficient knowledge of SDG&E's ESA Program in order to provide outreach and education services about the program's value to qualifying low-income customers.

SDG&E also plans to work through its existing government partnerships and other programs (core, third-party, customer assistance) to coordinate outreach efforts to property owners of affordable housing multifamily properties. To maximize the value of our relationships with government agencies, nonprofits, and industry trade associations, SDG&E will help develop joint communication materials to ensure outreach cohesiveness.

5. Marketing Education & Outreach³¹

SDG&E plans to enhance its existing ME&O efforts by using a new customer segmentation strategy which will improve how customer data is used and will help SDG&E better identify potential ESA Program customers. SDG&E will continue to leverage general awareness education efforts while incorporating new tactics, such as an interactive tool, customized home energy usage report, and targeted campaigns to multi-family property owners and managers. In addition, for PY2015-2017, SDG&E developed specialized ME&O tactics to identify, target and enroll customers who rent, live in rural areas, live in high poverty areas, are transient, and are non-transient.

E. Proposed Modifications to ESA Program Strategies/Policies

1. Modification to the Unwillingness Factor³²

As discussed above, SDG&E proposes to increase the current unwillingness factor from

³¹ Prepared Direct Testimony of SDG&E ESA Program witnesses Sandra Williams and Horace Tatum IV, at pp. 33-36.

³² Prepared Direct Testimony of SDG&E ESA Program witnesses Sandra Williams and Horace Tatum IV, at pp. 16-21.

5% to 19%. This change is warranted at this advanced stage of the ESA Program; it is of particular importance to properly reflect the population to serve by 2020. As the number of remaining customers shrinks, it becomes increasingly difficult to identify and treat these customers. SDG&E believes it is not the most efficient use of ratepayer funds to attempt to engage customers that are unwilling to participate in the program. Rather, the IOUs should work to serve customers that want to accept program benefits, resulting in a more efficient use of ratepayer funds.

2. Existing policy to return to the 10-Year Go-Back Rule³³

SDG&E proposes to change the existing policy to return to the 10-Year Go-Back Rule once the 2020 programmatic initiative goal of treating all eligible and willing customers is met. Based on the proposed 19% unwillingness factor, SDG&E anticipates meeting the 2020 treated home goal early in the 2018-2020 program cycle. If SDG&E is successful in achieving its treated homes goal earlier than anticipated, i.e., the 2015-2017 program cycle, SDG&E would like to implement the 10-Year Go-Back Rule at that time to be able to continue the program without interruptions. SDG&E would continue offering the ESA Program to new qualified customers that were not previously treated. In addition, SDG&E proposes to return to a home treated in the last 10 years for changes such as:

- Introduction of new cost effective measures/technologies into the ESA Program.
- Modification in program guidelines, such as the change in the requirement for refrigerator replacement.

³³ Prepared Direct Testimony of SDG&E ESA Program witnesses Sandra Williams and Horace Tatum IV, at p. 74-75.

- Change in household occupancy to a new customer willing to install measures that were refused by the prior resident.

3. Modification to ESA Program Fund Shifting Rules³⁴

The Commission formalized its rules for shifting program funds between program cost categories, sub-categories, and across program years and program budget cycles in D.08-11-051 and modified in D.10-10-008 for the CARE and ESA Programs. The Commission's adopted fund shifting rules also established requirements for requesting and reporting any such fund shifting.

SDG&E seeks Commission approval to modify the fund shifting rule that requires the IOUs to file a Motion to request a fund shift of carryover funds between its gas and electric departments. SDG&E recommends that utilities be permitted to use an Advice Letter process consistent with the Fund Shifting Rules adopted for the current Energy Efficiency Programs.³⁵ Utilizing the Advice Letter process would permit a more efficient administrative review process and would result in a more timely decision on the fund shifting request.

4. Proposal to Fund New Water/Energy Nexus Efforts Achieved During the 2015-2017 ESA Program From Green House Gas Forecasted Revenues

SDG&E's proposals to work with local water agencies and water utilities and offer energy savings measures that also conserve water go beyond existing SDG&E Energy Efficiency programs to reduce greenhouse gas ("GHG") emissions related to water conservation.

Therefore, SDG&E requests that the GHG allowance revenues fund \$3,630,000 for these water-related programs. SDG&E believes that these water-related programs should be funded through

³⁴ Prepared Direct Testimony of SDG&E ESA Program witnesses Sandra Williams and Horace Tantum IV, at pp. 26-27.

³⁵ Attachment C: Adopted Fund Shifting Rules, Energy Efficiency Policy Manual, Version 5, dated July 2013.

GHG allowance revenues because not all the savings accrue to electricity ratepayers, and savings are attributable to reduced water use, which benefits water ratepayers.

F. Pilots³⁶

SDG&E is not proposing any pilots for the PY2015-2017.

G. Studies³⁷

D.14-08-030 instructed the utilities to conduct four statewide studies during the 2015 to 2107 program cycle: an Impact Evaluation, a Needs Assessment, an Energy Education Part 2 Study, and a Non Energy Benefits and Equity Evaluation.

The Impact Evaluation will be conducted similar to those in the past with a billing analysis. The study will focus on providing updated energy and demand estimates to be used for program analysis and reporting in the subsequent program cycle.

The Needs Assessment will focus on the four topics listed in D.14-08-030: 1) provide estimates of remaining energy savings potential, 2) assess energy insecurity and burden, 3) evaluate the level of burden in providing income documentation for CARE participation; and 4) identify the most beneficial program measures.

The Energy Education Part 2 Study will analyze the savings potential of the energy education component of the ESA program. The Study will conduct an analysis to determine if any measureable savings can be identified and attributed to the education component of the program.

The Non-Energy Benefits (“NEB”s) and Equity Evaluation will accomplish two primary objectives. First, it will provide an updated approach for estimating NEBs for the ESA program

³⁶ Prepared Direct Testimony of SDG&E ESA Program witnesses Sandra Williams and Horace Tatum IV, at p. 99.

³⁷ Prepared Direct Testimony of SDG&E ESA Program witnesses Sandra Williams and Horace Tatum IV, at pp. 99-104.

and provide an updated spreadsheet that will be used for that purpose. Second, it will provide a rating system for assessing the program measures according to the health, comfort and safety criteria established by the Cost Effectiveness Working Group White Paper.

H. Budget³⁸

Table 4: ESA Program Budget for PY2015-2017

Program Year	Units	Proposed Budget ³⁹
2015	20,316	\$ 26,904,989
2016	20,316	\$ 30,649,504
2017	20,316	\$ 31,631,922

I. Revenue Requirements and Rate Impact

Table 5: Revenue Requirements and PPP Rates⁴⁰

	2014	2015	2016	2017
SDG&E				
Increase (Decrease) in PPPS Revenue Requirement \$ Millions:				
ESAP	\$0	\$1.2	\$4.1	\$0.5
Total PPPS Revenue	\$38	\$40	\$44	\$44
Change/year \$millions		\$1.2	\$4.1	\$0.5
Increase (Decrease) in PPPS Rate \$/th:				
Residential		\$0.00327	\$0.01085	\$0.00130
Core C&I		\$0.00107	\$0.00355	\$0.00042
NonCore C&I		\$0.00053	\$0.00176	\$0.00021

J. Conclusion

SDG&E respectfully requests that the Commission approve SDG&E’s ESA Program plans and budgets for PY2015-2017, as described herein and in the supporting testimony. Specifically, SDG&E requests that the Commission grant:

- Approval of SDG&E’s PY2015-2017 ESA Program plans and budgets.

³⁸ Prepared Direct Testimony of SDG&E ESA Program witnesses Sandra Williams and Horace Tantum IV, at pp. 104-105.

³⁹ This represents the ESA Program budget. This is not representative of the revenue requirement as SDG&E plans to partially offset the budget by using unspent carryover funds for PY2015-2017.

⁴⁰ Prepared Direct Testimony of SDG&E ESA Program witnesses Sandra Williams and Horace Tantum IV, at p. 108.

- Approval to allow SDG&E to continue its existing ESA Program into PY 2015, using PY2015 program funds, should the Commission be delayed in issuing a decision in this proceeding before year-end 2014, and count program achievements toward PY2015 accomplishments.
- Approval for SDG&E to shift funds in the ESA Program consistent with fund shifting authority in D.08-11-031 and as modified by D.10-10-008.
- Approval to use \$3.1 million in carryover funds for the 2015 ESA Program budget.
- Approval to use unspent electric funds to partially offset the electric revenue requirement for 2016 and 2017 ESA Program years.
- Approval of the mix of measures reflected in Attachment A-5 for the ESA Program.
- Approval to add new measures as proposed in Section II.E.1.b.
- Approval of the marketing and outreach elements requested herein.
- Approval to use the methodology adopted for the eligible population as revised herein.
- Approval to establish set budget limits for certain measures with substantial budget impact uncertainty as described herein.
- Approval to allow the 10-Year Go-Back Rule to provide for a sustainable ESA Program.
- Approval to continue integration and leveraging efforts.
- Approval of statewide impact evaluation, low income needs assessment, energy education (Phase 2) and cost-effectiveness studies for the 2015-2017 program cycle.

V. CARE PROGRAM

Below is a discussion of SDG&E's proposed CARE Program administrative activities

and budget for PY2015-2017.

A. Overview

The CARE program was established to assist eligible low-income households, with total household gross income which is no greater than 200% of the FPG, with a monthly discount on their gas and electric bills. The program is funded through a PPP surcharge paid through non-participating customer's monthly energy bills. Currently, SDG&E provides a 20% discount on gas and electric bills, with additional rate exemptions. However, due to AB 327⁴¹, changes regarding the level of discount and how the discount is provided are expected within the 2015-2017 program cycle. The bill required the utilities to restructure the CARE rates and to set an effective electric rate discount between 30-35%.

1. Summary

For PY2015-2017, SDG&E plans to: 1) continue to improve on many of the successful and existing strategies developed over the past several years; 2) incorporate best practices being utilized amongst the large IOUs; and, 3) improve upon existing efforts to retain enrollment of qualified customers who are required to recertify their eligibility or who have been selected for PEV. SDG&E also reviewed recommendations contained within the Low-Income Needs Assessment ("LINA") Study, and identified and incorporated strategies to increase enrollment in underserved communities.

2. Requests

SDG&E continues to strive to meet the Commission's goal of enrolling 90% of its eligible and willing customers in CARE. As of September 2014, SDG&E's CARE Program has

⁴¹ AB 327 became effective on January 1, 2014.

a penetration rate of 77.5%.⁴² SDG&E has estimated net enrollments of 8,000 in PY2015, 17,000 in PY2016, and 20,000 in PY2017.⁴³

In order to reach the projected enrollment goals and fund the proposed PY2015-2017 activities, SDG&E is requesting administrative budgets of \$5.48 million⁴⁴ for PY2015, \$6.68 million for PY2016, and \$6.83 million for PY2017.⁴⁵

B. Program Eligibility Guidelines

The CARE program is available to all SDG&E customers who wish to participate and meet either one of two qualifications guideline requirements. First, if the total gross (before tax) income of all persons in the household is at or below 200% of the FPG⁴⁶. Customers may also qualify for the CARE Program via the categorical eligibility process.

1. Existing strategies⁴⁷

There are three processes of the CARE program: new enrollments, recertification, and PEV. To support these program processes, SDG&E utilizes various marketing and outreach strategies and tactics to improve customer participation. Activities include the following:

- Direct Marketing (e.g. Direct mail, AVM, email, rate education reports);
- Phone Enrollment and Phone Recertification – CARE IVR and AVM;

⁴² Prepared Direct Testimony of SDG&E CARE Program witnesses Sandra Williams and Horace Tatum IV, at p. 57.

⁴³ Prepared Direct Testimony of SDG&E CARE Program witnesses Sandra Williams and Horace Tatum IV, at p. 14.

⁴⁴ SDG&E administrative budget for PY2015 was adopted in D.14-08-030, at OP 2.

⁴⁵ Prepared Direct Testimony of SDG&E CARE Program witnesses Sandra Williams and Horace Tatum IV, at p. 12.

⁴⁶ Pursuant to Resolution E-3524, adopted February 1998, the Commission ordered the Director of the Energy Division to communicate new income levels to utilities by no later than May 1st of each year and to require the utilities to file revised tariffs effective June 1st if each year reflecting the new income levels. OP 119 of D.12-08-044 changed the annual income letter release date from May 1 to April 1 of each year.

⁴⁷ Prepared Direct Testimony of SDG&E CARE Program witnesses Sandra Williams and Horace Tatum IV, at pp. 34-35.

- Bill Package – bill insert, onsert and bill newsletter;
- Website and Phone App– SDGE.com and SDG&E mobile phone app;
- Multilingual Mass Media Campaigns – Television, radio, print;
- Social Media – Facebook, You Tube, and Twitter;
- Digital Advertising – online banner and search engine ads;
- Collateral – education booklets, application forms and program information sheets;
and
- Community Outreach – events, presentations, and trainings.

SDG&E works closely with a network of over 200 community-based organizations to connect customers to the CARE Program. These organizations represent the diversity of SDG&E’s service territory. These organizations conduct the following activities:

- Door-to-door canvassing;
- In person enrollment services;
- Presentations and events;
- Delivery of program material/collateral on their websites, social media channels (Facebook, Twitter, Pinterest, LinkedIn), email blasts, e-newsletters and print newsletters; and
- Promotion and customize messaging to targeted audiences.

SDG&E will continue to build on the success of marketing and outreach strategies during the 2015-2017 program cycle.

2. Proposed Strategies

SDG&E will employ the following new strategies to improve upon program participation and retention for PY2015-2017:

New Enrollment⁴⁸

- Customer Contact Center phone enrollment
- CARE Rate Education Reports targeting potentially eligible customers
- Utilize updated customer segmentation information to improve targeting efforts
- Use multi-tactic marketing efforts using, direct mail, email, live phone enrollment, and door-to-door canvassing to target hard-to-reach customers such as renters, and customers who live in rural and high poverty areas
- Increase language options on the online enrollment form
- Leverage partnerships with CBOs, tribal organizations, and other public and private organizations that work in conjunction with the California Lifeline and/or the Covered California agencies
- Simplify customer identification for the online forms by eliminating the need to provide difficult to remember data, such as utility account number
- Utilize ESA Program contractors to conduct door-to-door outreach.

Recertification⁴⁹

- Customer alerts utilizing MyAccount and/or SDG&E's mobile application.
- Multi-tactic marketing efforts using, direct mail, email, phone enrollment, and door-to-door canvassing.
- Improved delivery of recertification process on SDGE.com.
- Increased language options for the online recertification.

⁴⁸ Prepared Direct Testimony of SDG&E CARE Program witnesses Sandra Williams and Horace Tantum IV, at pp. 42-43.

⁴⁹ Prepared Direct Testimony of SDG&E CARE Program witnesses Sandra Williams and Horace Tantum IV, at p. 43.

- Simplify customer identification for the online forms by eliminating the need to provide difficult to remember data, such as utility account number.

PEV⁵⁰

- Customer alerts utilizing MyAccount and/or SDG&E's mobile application.
- Improve delivery of verification process on SDGE.com.
- Document uploading using a secure portal.
- Increased language options for verification.

Other Initiatives⁵¹

- High usage alerts to notify CARE customers that their usage may exceed 600% of baseline so they can take action to reduce their use to remain enrolled in CARE.
- Processing system automation to reduce data entry errors, increase customer security, and speed the process of enrollment, recertification and income verification.

3. Leveraging Opportunities⁵²

SDG&E will continue to utilize community partners to promote the CARE Program and improve opportunities to enroll customers in the program, with increased emphasis in areas where CARE penetration is lower than 75 percent. For example, SDG&E, in conjunction with the other IOUs, have coordinated with CSD to review the processing of LIHEAP crisis grants for customers account. SDG&E will continue to work with CSD on grant posting procedures as well as, how to best leverage the bill assistance funds to ensure that customers receive the

⁵⁰ Prepared Direct Testimony of SDG&E CARE Program witnesses Sandra Williams and Horace Tantum IV, at p. 43.

⁵¹ *Id.*

⁵² Prepared Direct Testimony of SDG&E CARE Program witnesses Sandra Williams and Horace Tantum IV, at p. 52.

greatest benefit.

SDG&E will also leverage opportunities to work with California Lifeline and Covered California agencies to deliver messages to targeted minority, low income and special needs customers. In addition, SDG&E will continue to coordinate leveraging opportunities with SoCalGas and California American Water.

C. Pilots⁵³

SDG&E is not requesting any new pilots for the 2015-2017 program cycle. However, SDG&E is including the cost already approved in D.14-08-030 for continuing the CHANGES Pilot Program during 2015. For 2015, approved funding for the pilot is \$61,200 monthly, which includes a 2% cost of living increase from the 2014 funding level. SDG&E's pro-rata share of the authorized funding is \$9,180, annualized to \$110,160. SDG&E has included \$112,363 for 2016 and \$114,610 for 2017 should the Commission approve the CHANGES program as an ongoing program, and determines what the budget should be, and whether it is appropriate to continue funding the CHANGES through the CARE Program.

D. Studies⁵⁴

SDG&E is proposing update to the 2013 LINA study, in compliance with AB 327. The LINA study will be helpful in further identifying program challenges and provide recommendations in how to improve the delivery of the program.

⁵³ Prepared Direct Testimony of SDG&E CARE Program witnesses Sandra Williams and Horace Tantum IV, at p. 45.

⁵⁴ Prepared Direct Testimony of SDG&E CARE Program witnesses Sandra Williams and Horace Tantum IV, at p. 57.

E. Budget⁵⁵

Table 6 - 2015-2017 Proposed CARE Program Budget

CARE Budget Categories	2015	2016	2017	Program Cycle
Outreach	\$2,300,352	\$3,186,046	\$3,250,245	\$8,736,642
Processing, Certification, Recertification	\$643,206	\$660,164	\$676,972	\$1,980,341
Post Enrollment Verification	\$437,912	\$369,581	\$341,012	\$1,148,505
IT Programming	\$1,098,580	\$1,375,387	\$1,485,444	\$3,959,411
Cool Centers	\$35,985	\$36,853	\$37,725	\$110,563
Pilots	\$110,160	\$112,363	\$114,610	\$337,133
Measurement and Evaluation	\$24,750	\$24,750	\$24,750	\$74,250
Regulatory Compliance	\$244,408	\$250,875	\$257,659	\$752,942
General Administration	\$533,900	\$573,107	\$587,342	\$1,694,349
CPUC Energy Division Staff	\$56,712	\$58,080	\$59,454	\$174,246
SUBTOTAL MANAGEMENT COSTS	\$5,485,965	\$6,647,204	\$6,835,212	\$18,968,381
Subsidies and Benefits	\$71,766,318	\$69,916,644	\$73,102,151	\$214,785,113
TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	\$77,252,283	\$76,563,848	\$79,937,363	\$233,753,494

⁵⁵ Prepared Direct Testimony of SDG&E CARE Program witnesses Sandra Williams and Horace Tantum IV, at p. 58.

F. Revenue Requirements and Rate Impacts⁵⁶

Table 7: Revenue Requirements and PPP Rates

Revenue Requirements and PPPS Rates - CARE				
	2014	2015	2016	2017
SDG&E				
Increase (Decrease) in PPPS Revenue Requirement \$ Millions:				
CARE Program	\$0	(\$0.8)	\$0.4	\$0.1
CARE Admin	\$0	\$0.0	\$0.2	\$0.0
	<u>\$0</u>	<u>(\$0.8)</u>	<u>\$0.6</u>	<u>\$0.2</u>
Total PPPS Revenue	\$38	\$37	\$38	\$38
Change/year \$millions		(\$0.8)	\$0.6	\$0.2
Increase (Decrease) in PPPS Rate \$/th:				
Residential		(\$0.00190)	\$0.00145	\$0.00045
Core C&I		(\$0.00190)	\$0.00145	\$0.00045
NonCore C&I		(\$0.00190)	\$0.00145	\$0.00045

G. Conclusion

SDG&E respectfully requests the Commission to approve the CARE program plans and budgets for PY2015, PY2016, and PY2017 as described in this testimony and authorize the following:

1. Approval of its PY2015, PY2016 and PY2017 CARE program plans and forecasted administrative costs.
2. Authorization to implement CARE program changes and activities as described herein and in the supporting testimony.

VI. STATUTORY AND PROCEDURAL REQUIREMENTS

A. Proposed Category, Issues to Be Considered, Need for Hearings and Proposed Schedule

SDG&E proposes to categorize this Application as a “ratesetting” proceeding within the meaning of Rules 1.3(e) and 7.1. Because of the limited factual issues to be addressed in this

⁵⁶ Prepared Direct Testimony of SDG&E CARE Program witnesses Sandra Williams and Horace Tantum IV, at p. 61.

proceeding, SDG&E does not anticipate a need for hearings. In the event hearings do become necessary, SDG&E proposes two procedural schedules:

Schedule 1 (Assumes No Hearings)

Filing of Application	November 18, 2014
Protests	December 19, 2014
Replies to Protests	December 29, 2014
Prehearing Conference	January 7, 2014
Testimony of Interested Parties	February 13, 2015
Rebuttal Testimony/Replies to Comments	March 13, 2015
Evidentiary Hearings (if needed)	April 1-3, 2015
Opening Briefs	April 24, 2015
Reply Briefs	May 8, 2015
Proposed Decision	June 23, 2015
Comments to Proposed Decision	July 13, 2015
Reply Comments to Proposed Decision	July 20, 2015
Final Decision	August 2015

Schedule 2 (Assumes no Hearings)

Filing of Application	November 18, 2014
Prehearing Conference	January 7, 2014
Protests	December 19, 2015
Replies to Protests	December 29, 2014
Testimony of Interested Parties	February 13, 2015
Rebuttal Testimony/Replies to Comments	March 13, 2015
Prehearing Conference	March 23, 2015
Opening Briefs	April 3, 2015
Reply Briefs	April 17, 2015
Proposed Decision	June 2, 2015
Comments to Proposed Decision	June 22, 2015
Reply Comments to Proposed Decision	June 29, 2015
Final Decision	July 2015

SDG&E recommends that the Commission adopt the first of these two proposed schedules for the reason explained above.

B. Statutory Authority - Rule 2.1

This Application is made pursuant to Section 451, 701, 702, 728, and 729 of the Public Utilities Code of the State of California; the Commission's Rules of Practice and Procedure; and the other relevant prior decisions, orders, and resolutions of the Commission.

C. Legal Name, Place of Business/Incorporation - Rule 2.1(a)

Applicant's legal name is San Diego Gas & Electric Company. SDG&E is a public

utility corporation organized and existing under the laws of the State of California, with its principal place of business at 8326 Century Park Court, San Diego, CA 92123-4150.

D. Correspondence - Rule 2.1(b)

Correspondence or communication regarding this Application should be addressed to:

Joy Yamagata
Regulatory Manager
San Diego Gas & Electric Company
8330 Century Park Court
San Diego, California 92123-1550
Telephone: (858) 654-1755
Facsimile: (858) 654-1788
E-Mail: jyamagata@semprautilities.com

With a copy to:

Kim F. Hassan
Attorney
Southern California Gas Company
555 West 5th Street, GT14E7
Los Angeles, California 90013
Telephone: (213) 244-3061
Facsimile: (213) 629-9620
E-mail: khassan@semprautilities.com

E. Articles of Incorporation - Rule 2.2

SDG&E is incorporated under the laws of the State of California. A certified copy of the restated Articles of Incorporation, as last amended, currently in effect and certified by the California Secretary of State, was filed with the Commission on October 1, 1998 in connection with SoCalGas' Application No. 98-10-012, and is incorporated herein by reference.

F. Financial Statement, Balance Sheet and Income Statement – Rule 3.2(a)(4)

Appendix A to this Application is SDG&E's Balance Sheet as of June 30, 2012.

G. Rates – Rules 3.2(a)(2) and 3.2(a)(3)

The current and proposed rates that will result from this Application are described in Attachment B-2.

H. Property and Equipment – Rule 3.2 (a)(4)

A general description of SDG&E’s properties was filed with the Commission on October 5, 2001, in connection with Application 01-10-005, and is incorporated herein by reference.

Appendix B to this Application is a statement of SDG&E’s Cost of Property and Depreciation Reserve Applicable thereto as of June 30, 2012.

I. Summary of Earnings – Rules 3.2(a)(5)

Appendix C to this Application is a Summary of Earnings for SDG&E for the 3 months ended June 30, 2012.

J. Depreciation – Rule 3.2(7)

For financial statement purposes, depreciation of utility plant has been computed on a straight-line remaining life basis at rates based on the estimated useful lives of plant properties. For federal income tax accrual purposes, SDG&E generally computes depreciation using the straight-line method for tax property additions prior to 1954, and liberalized depreciation, which includes Class Life and Asset Depreciation Range Systems, on tax property additions after 1954 and prior to 1981. For financial reporting and rate-fixing purposes, “flow through accounting” has been adopted for such properties. For tax property additions in years 1981 through 1986, SDG&E has computed its tax depreciation using the Accelerated Cost Recovery System. For years after 1986, SDG&E has computed its tax depreciation using the Modified Accelerated Cost

Recovery Systems and, since 1982, has normalized the effects of the depreciation differences in accordance with the Economic Recovery Tax Act of 1981 and the Tax Reform Act of 1986.

K. Proxy Statement – Rule 3.2(a)(8)

A copy of SDG&E’s most recent proxy statement, dated April 27, 2011, was provided to the Commission on May 4, 2011, and is incorporated herein by reference.

L. Pass Through of Costs – Rule 3.2(a)(10)

A copy of SDG&E’s most recent proxy statement, dated April 27, 2011, was provided to the Commission on May 4, 2011, and is incorporated herein by reference.

M. Service and Notice – Rule 3.2(b)

SDG&E is serving this Application on all parties to A.11-05-017 *et al*, R.13-12-011, and R.13-11-005. Within ten days of filing this application, SDG&E will mail notice of this Application to the State of California and to cities and counties that SDG&E serves and SDG&E will post the notice in its offices and publish the notice in newspapers of general circulation in each county in its service territory. In addition, SDG&E will include notices with the regular bills mailed to all customers affected by the proposed rate changes. The service list of state and government agencies is attached hereto as Appendix D.

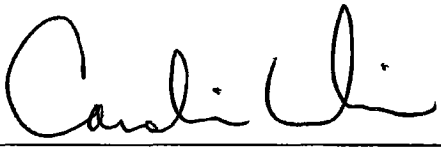
VII. RELIEF REQUESTED

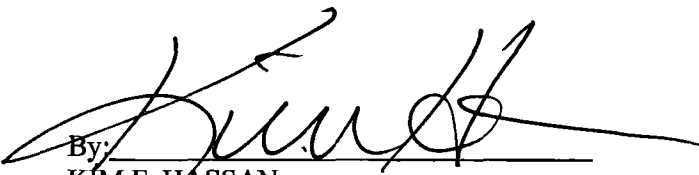
For the reasons set forth in this Application and accompanying testimony, SDG&E respectfully asks the Commission to:

- 1) Approve SDG&E’s low-income assistance program plans, measures, and budgets for PY2015-2017.

- 2) Approve SDG&E's requested changes to the Commission-adopted policies for the Energy Savings Assistance Program and CARE program.
- 3) Grant such other and further relief which the Commission finds to be just and reasonable.

Respectfully submitted this 18th day of November 2014,

By: 
CAROLINE A. WINN
Vice President - Customer Services
SAN DIEGO GAS & ELECTRIC COMPANY

By: 
KIM F. HASSAN
Attorney for.
SAN DIEGO GAS & ELECTRIC COMPANY
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Los Angeles, CA 90013
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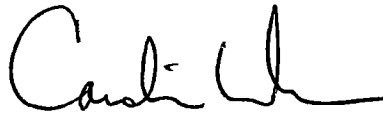
November 18, 2014

VERIFICATION

I am an officer of San Diego Gas & Electric Company, and am authorized to make this verification on its behalf. I am informed and believe that the matters stated in the foregoing Application are true to my own knowledge, except as to matters which are therein stated on information and belief, and as to those matters I believe them to be true.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Executed this 18th day of November, 2014 at Los Angeles, California.



CAROLINE WINN
Vice President - Customer Services

APPENDIX A

SAN DIEGO GAS & ELECTRIC COMPANY
FINANCIAL STATEMENT
JUNE 30, 2012

(a) Amounts and Kinds of Stock Authorized:

Preferred Stock	1,375,000	shares	Par Value \$27,500,000
Preferred Stock	10,000,000	shares	Without Par Value
Preferred Stock	Amount of shares not specified		\$80,000,000
Common Stock	255,000,000	shares	Without Par Value

Amounts and Kinds of Stock Outstanding:

PREFERRED STOCK

5.0%	375,000	shares	\$7,500,000
4.50%	300,000	shares	6,000,000
4.40%	325,000	shares	6,500,000
4.60%	373,770	shares	7,475,400
\$1.70	1,400,000	shares	35,000,000
\$1.82	640,000	shares	16,000,000

COMMON STOCK

116,583,358 shares 291,458,395

(b) Terms of Preferred Stock:

Full information as to this item is given in connection with Application Nos. 93-09-069, 04-01-009, 06-05-015 and 10-10-023 to which references are hereby made.

(c) Brief Description of Mortgage:

Full information as to this item is given in Application Nos. 08-07-029, 10-10-023 and 12-03-005 to which references are hereby made.

(d) Number and Amount of Bonds Authorized and Issued:

	Nominal Date of Issue	Par Value Authorized and Issued	Outstanding	Interest Paid in 2011
<u>First Mortgage Bonds:</u>				
6.8% Series KK, due 2015	12-01-91	14,400,000	14,400,000	979,200
Var% Series OO, due 2027	12-01-92	250,000,000	150,000,000	7,612,500
5.85% Series RR, due 2021	06-29-93	60,000,000	60,000,000	3,510,000
2.539% Series VV, due 2034	06-17-04	43,615,000	43,615,000	2,562,373
2.539% Series WW, due 2034	06-17-04	40,000,000	40,000,000	2,349,999
2.516% Series XX, due 2034	06-17-04	35,000,000	35,000,000	2,056,249
2.832% Series YY, due 2034	06-17-04	24,000,000	24,000,000	1,409,999
2.832% Series ZZ, due 2034	06-17-04	33,650,000	33,650,000	1,976,936
2.8275% Series AAA, due 2039	06-17-04	75,000,000	75,000,000	134,561
5.35% Series BBB, due 2035	05-19-05	250,000,000	250,000,000	13,375,000
5.30% Series CCC, due 2015	11-17-05	250,000,000	250,000,000	13,250,000
6.00% Series DDD, due 2026	06-08-06	250,000,000	250,000,000	15,000,000
Var Series EEE, due 2018	09-21-06	161,240,000	161,240,000	324,863
6.125% Series FFF, due 2037	09-20-07	250,000,000	250,000,000	15,312,500
6.00% Series GGG, due 2039	05-14-09	300,000,000	300,000,000	18,000,000
5.35% Series HHH, due 2040	05-13-10	250,000,000	250,000,000	13,375,000
4.50% Series III, due 2040	08-15-10	500,000,000	500,000,000	21,812,500
3.00% Series JJJ, due 2021	08-18-11	350,000,000	350,000,000	0
3.95% Series LLL, due 2041	11-17-11	250,000,000	250,000,000	0
4.30% Series MMM, due 2042	03-22-12	250,000,000	250,000,000	0
<u>Unsecured Bonds:</u>				
5.9% CPCFA96A, due 2014	06-01-96	129,820,000	129,820,000	7,659,380
5.3% CV96A, due 2021	08-02-96	38,900,000	38,900,000	2,061,700
5.5% CV96B, due 2021	11-21-96	60,000,000	60,000,000	3,300,000
4.9% CV97A, due 2023	10-31-97	25,000,000	25,000,000	1,225,000

**SAN DIEGO GAS & ELECTRIC COMPANY
FINANCIAL STATEMENT
JUNE 30, 2012**

<u>Other Indebtedness:</u>	Date of Issue	Date of Maturity	Interest Rate	Outstanding	Interest Paid
Commercial Paper & ST Bank Loans	Various	Various	Various	0	\$0

Amounts and Rates of Dividends Declared:

The amounts and rates of dividends during the past five fiscal years are as follows:

Preferred Stock	Shares	Dividends Declared				
	Outstanding 12-31-11	2007	2008	2009	2010	2011
5.0%	375,000	\$375,000	\$375,000	\$375,000	\$375,000	\$375,000
4.50%	300,000	270,000	270,000	270,000	270,000	270,000
4.40%	325,000	286,000	286,000	286,000	286,000	286,000
4.60%	373,770	343,868	343,868	343,868	343,868	343,868
\$ 1.7625	0	969,375	242,344	0	0	0
\$ 1.70	1,400,000	2,380,000	2,380,000	2,380,000	2,380,000	2,380,000
\$ 1.82	640,000	1,164,800	1,164,800	1,164,800	1,164,800	1,164,800
	<u>3,413,770</u>	<u>\$5,789,043</u>	<u>\$5,062,012</u> [1]	<u>\$4,819,668</u>	<u>\$4,819,668</u>	<u>\$4,819,668</u>

Common Stock

Dividend to Parent \$0 \$0 \$150,000,000 [2]

A balance sheet and a statement of income and retained earnings of Applicant for the six months ended June 30, 2012 are attached hereto.

[1] Includes \$242,344 of interest expense related to redeemable preferred stock.

[2] San Diego Gas & Electric Company dividend to parent.

SAN DIEGO GAS & ELECTRIC COMPANY
BALANCE SHEET
ASSETS AND OTHER DEBITS
JUNE 30, 2012

1. UTILITY PLANT		<u>2012</u>
101	UTILITY PLANT IN SERVICE	\$13,481,761,159
102	UTILITY PLANT PURCHASED OR SOLD	-
105	PLANT HELD FOR FUTURE USE	8,152,834
106	COMPLETED CONSTRUCTION NOT CLASSIFIED	-
107	CONSTRUCTION WORK IN PROGRESS	561,693,420
108	ACCUMULATED PROVISION FOR DEPRECIATION OF UTILITY PLANT	(4,814,036,859)
111	ACCUMULATED PROVISION FOR AMORTIZATION OF UTILITY PLANT	(236,083,492)
118	OTHER UTILITY PLANT	686,132,664
119	ACCUMULATED PROVISION FOR DEPRECIATION AND AMORTIZATION OF OTHER UTILITY PLANT	(185,854,463)
120	NUCLEAR FUEL - NET	<u>101,551,066</u>
TOTAL NET UTILITY PLANT		<u>9,603,316,329</u>
 2. OTHER PROPERTY AND INVESTMENTS		
121	NONUTILITY PROPERTY	6,304,566
122	ACCUMULATED PROVISION FOR DEPRECIATION AND AMORTIZATION OF NONUTILITY PROPERTY	(545,872)
123	INVESTMENTS IN SUBSIDIARY COMPANIES	-
124	OTHER INVESTMENTS	-
125	SINKING FUNDS	-
128	OTHER SPECIAL FUNDS	<u>847,160,556</u>
TOTAL OTHER PROPERTY AND INVESTMENTS		<u>852,919,250</u>

Data from SPL as of August 28, 2012

SAN DIEGO GAS & ELECTRIC COMPANY
BALANCE SHEET
ASSETS AND OTHER DEBITS
JUNE 30, 2012

3. CURRENT AND ACCRUED ASSETS		2011
131	CASH	3,102,582
132	INTEREST SPECIAL DEPOSITS	-
134	OTHER SPECIAL DEPOSITS	-
135	WORKING FUNDS	500
136	TEMPORARY CASH INVESTMENTS	-
141	NOTES RECEIVABLE	-
142	CUSTOMER ACCOUNTS RECEIVABLE	178,760,346
143	OTHER ACCOUNTS RECEIVABLE	26,265,519
144	ACCUMULATED PROVISION FOR UNCOLLECTIBLE ACCOUNTS	(2,934,006)
145	NOTES RECEIVABLE FROM ASSOCIATED COMPANIES	-
146	ACCOUNTS RECEIVABLE FROM ASSOCIATED COMPANIES	504,891
151	FUEL STOCK	659,585
152	FUEL STOCK EXPENSE UNDISTRIBUTED	-
154	PLANT MATERIALS AND OPERATING SUPPLIES	77,150,729
156	OTHER MATERIALS AND SUPPLIES	-
163	STORES EXPENSE UNDISTRIBUTED	2,581
164	GAS STORED	124,240
165	PREPAYMENTS	244,919,100
171	INTEREST AND DIVIDENDS RECEIVABLE	4,010,884
173	ACCRUED UTILITY REVENUES	53,372,000
174	MISCELLANEOUS CURRENT AND ACCRUED ASSETS	5,116,907
175	DERIVATIVE INSTRUMENT ASSETS	30,297,808
TOTAL CURRENT AND ACCRUED ASSETS		621,353,666
4. DEFERRED DEBITS		
181	UNAMORTIZED DEBT EXPENSE	34,881,726
182	UNRECOVERED PLANT AND OTHER REGULATORY ASSETS	2,661,943,833
183	PRELIMINARY SURVEY & INVESTIGATION CHARGES	5,111,147
184	CLEARING ACCOUNTS	950,614
185	TEMPORARY FACILITIES	-
186	MISCELLANEOUS DEFERRED DEBITS	21,387,769
188	RESEARCH AND DEVELOPMENT	-
189	UNAMORTIZED LOSS ON REACQUIRED DEBT	17,933,275
190	ACCUMULATED DEFERRED INCOME TAXES	331,499,846
TOTAL DEFERRED DEBITS		3,073,708,210
TOTAL ASSETS AND OTHER DEBITS		14,151,297,455

Data from SPL as of August 28, 2012

SAN DIEGO GAS & ELECTRIC COMPANY
BALANCE SHEET
LIABILITIES AND OTHER CREDITS
JUNE 30, 2012

5. PROPRIETARY CAPITAL

	2011
201 COMMON STOCK ISSUED	(\$291,458,395)
204 PREFERRED STOCK ISSUED	(78,475,400)
207 PREMIUM ON CAPITAL STOCK	(592,222,753)
210 GAIN ON RETIRED CAPITAL STOCK	-
211 MISCELLANEOUS PAID-IN CAPITAL	(479,665,368)
214 CAPITAL STOCK EXPENSE	25,688,571
216 UNAPPROPRIATED RETAINED EARNINGS	(2,612,805,953)
219 ACCUMULATED OTHER COMPREHENSIVE INCOME	9,839,096
TOTAL PROPRIETARY CAPITAL	(4,019,100,202)

6. LONG-TERM DEBT

221 BONDS	(3,536,905,000)
223 ADVANCES FROM ASSOCIATED COMPANIES	-
224 OTHER LONG-TERM DEBT	(253,720,000)
225 UNAMORTIZED PREMIUM ON LONG-TERM DEBT	-
226 UNAMORTIZED DISCOUNT ON LONG-TERM DEBT	12,000,022
TOTAL LONG-TERM DEBT	(3,778,624,978)

7. OTHER NONCURRENT LIABILITIES

227 OBLIGATIONS UNDER CAPITAL LEASES - NONCURRENT	(684,017,922)
228.2 ACCUMULATED PROVISION FOR INJURIES AND DAMAGES	(52,944,902)
228.3 ACCUMULATED PROVISION FOR PENSIONS AND BENEFITS	(342,325,269)
228.4 ACCUMULATED MISCELLANEOUS OPERATING PROVISIONS	-
230 ASSET RETIREMENT OBLIGATIONS	(717,487,519)
TOTAL OTHER NONCURRENT LIABILITIES	(1,796,775,612)

Data from SPL as of August 28, 2012

SAN DIEGO GAS & ELECTRIC COMPANY
BALANCE SHEET
LIABILITIES AND OTHER CREDITS
JUNE 30, 2012

8. CURRENT AND ACCRUED LIABILITES		2011
231	NOTES PAYABLE	(172,702,372)
232	ACCOUNTS PAYABLE	(318,239,666)
233	NOTES PAYABLE TO ASSOCIATED COMPANIES	-
234	ACCOUNTS PAYABLE TO ASSOCIATED COMPANIES	(18,849,149)
235	CUSTOMER DEPOSITS	(62,242,139)
236	TAXES ACCRUED	(1,357,934)
237	INTEREST ACCRUED	(42,470,591)
238	DIVIDENDS DECLARED	(1,204,917)
241	TAX COLLECTIONS PAYABLE	(4,701,369)
242	MISCELLANEOUS CURRENT AND ACCRUED LIABILITIES	(401,250,522)
243	OBLIGATIONS UNDER CAPITAL LEASES - CURRENT	(36,263,089)
244	DERIVATIVE INSTRUMENT LIABILITIES	(203,858,886)
245	DERIVATIVE INSTRUMENT LIABILITIES - HEDGES	-
TOTAL CURRENT AND ACCRUED LIABILITIES		(1,263,140,634)
9. DEFERRED CREDITS		
252	CUSTOMER ADVANCES FOR CONSTRUCTION	(15,534,875)
253	OTHER DEFERRED CREDITS	(396,191,385)
254	OTHER REGULATORY LIABILITIES	(1,063,256,106)
255	ACCUMULATED DEFERRED INVESTMENT TAX CREDITS	(25,944,728)
257	UNAMORTIZED GAIN ON REACQUIRED DEBT	-
281	ACCUMULATED DEFERRED INCOME TAXES - ACCELERATED	(5,201,256)
282	ACCUMULATED DEFERRED INCOME TAXES - PROPERTY	(1,417,890,196)
283	ACCUMULATED DEFERRED INCOME TAXES - OTHER	(369,637,483)
TOTAL DEFERRED CREDITS		(3,293,656,029)
TOTAL LIABILITIES AND OTHER CREDITS		(\$14,151,297,455)

Data from SPL as of August 28, 2012

SAN DIEGO GAS & ELECTRIC COMPANY
STATEMENT OF INCOME AND RETAINED EARNINGS
SIX MONTHS ENDED JUNE 30, 2012

1. UTILITY OPERATING INCOME

400	OPERATING REVENUES		\$2,000,988,845
401	OPERATING EXPENSES	\$1,312,821,250	
402	MAINTENANCE EXPENSES	97,764,157	
403-7	DEPRECIATION AND AMORTIZATION EXPENSES	218,162,326	
408.1	TAXES OTHER THAN INCOME TAXES	40,941,982	
409.1	INCOME TAXES	(174,322,922)	
410.1	PROVISION FOR DEFERRED INCOME TAXES	331,223,893	
411.1	PROVISION FOR DEFERRED INCOME TAXES - CREDIT	(29,701,225)	
411.4	INVESTMENT TAX CREDIT ADJUSTMENTS	141,834	
411.6	GAIN FROM DISPOSITION OF UTILITY PLANT	-	
	TOTAL OPERATING REVENUE DEDUCTIONS		1,797,031,295
	NET OPERATING INCOME		203,957,550

2. OTHER INCOME AND DEDUCTIONS

415	REVENUE FROM MERCHANDISING, JOBBING AND CONTRACT WORK	-	
417.1	EXPENSES OF NONUTILITY OPERATIONS	(2,435)	
418	NONOPERATING RENTAL INCOME	185,881	
418.1	EQUITY IN EARNINGS OF SUBSIDIARIES	-	
419	INTEREST AND DIVIDEND INCOME	2,343,338	
419.1	ALLOWANCE FOR OTHER FUNDS USED DURING CONSTRUCTION	55,139,237	
421	MISCELLANEOUS NONOPERATING INCOME	357,816	
421.1	GAIN ON DISPOSITION OF PROPERTY	-	
	TOTAL OTHER INCOME	58,023,837	
421.2	LOSS ON DISPOSITION OF PROPERTY	-	
426	MISCELLANEOUS OTHER INCOME DEDUCTIONS	1,927,068	
	TOTAL OTHER INCOME DEDUCTIONS	1,927,068	
408.2	TAXES OTHER THAN INCOME TAXES	257,021	
409.2	INCOME TAXES	(20,476,406)	
410.2	PROVISION FOR DEFERRED INCOME TAXES	0	
411.2	PROVISION FOR DEFERRED INCOME TAXES - CREDIT	5,911,328	
	TOTAL TAXES ON OTHER INCOME AND DEDUCTIONS	(14,308,057)	
	TOTAL OTHER INCOME AND DEDUCTIONS		70,404,826
	INCOME BEFORE INTEREST CHARGES		274,362,376
	NET INTEREST CHARGES*		71,583,692
	NET INCOME		\$202,778,684

*NET OF ALLOWANCE FOR BORROWED FUNDS USED DURING CONSTRUCTION, (10,071,740)

Data from SPL as of August 28, 2012

SAN DIEGO GAS & ELECTRIC COMPANY
STATEMENT OF INCOME AND RETAINED EARNINGS
SIX MONTHS ENDED JUNE 30, 2012

3. RETAINED EARNINGS

RETAINED EARNINGS AT BEGINNING OF PERIOD, AS PREVIOUSLY REPORTED	\$2,412,437,103
NET INCOME (FROM PRECEDING PAGE)	202,778,684
DIVIDEND TO PARENT COMPANY	-
DIVIDENDS DECLARED - PREFERRED STOCK	(2,409,834)
OTHER RETAINED EARNINGS ADJUSTMENTS	
RETAINED EARNINGS AT END OF PERIOD	<u>\$2,612,805,953</u>

APPENDIX B

SAN DIEGO GAS & ELECTRIC COMPANY
COST OF PROPERTY AND
DEPRECIATION RESERVE APPLICABLE THERETO
AS OF JUNE 30, 2012

<u>No.</u>	<u>Account</u>	<u>Original Cost</u>	<u>Reserve for Depreciation and Amortization</u>
ELECTRIC DEPARTMENT			
302	Franchises and Consents	\$ 222,841	\$ 202,900
303	Misc. Intangible Plant	76,103,747	3,418,974
	TOTAL INTANGIBLE PLANT	76,326,589	3,621,874
310.1	Land	14,526,518	46,518
310.2	Land Rights	0	0
311	Structures and Improvements	81,508,643	27,399,062
312	Boiler Plant Equipment	163,175,349	46,728,003
314	Turbogenerator Units	112,737,442	30,889,228
315	Accessory Electric Equipment	81,644,526	23,897,662
316	Miscellaneous Power Plant Equipment	25,699,233	5,340,981
	Steam Production Decommissioning	0	0
	TOTAL STEAM PRODUCTION	479,291,710	134,301,453
320.1	Land	0	0
320.2	Land Rights	283,677	283,677
321	Structures and Improvements	275,642,995	270,485,059
322	Boiler Plant Equipment	556,213,056	416,242,590
323	Turbogenerator Units	142,374,657	137,031,441
324	Accessory Electric Equipment	173,096,983	167,555,908
325	Miscellaneous Power Plant Equipment	314,545,321	236,573,247
107	ICIP CWIP	0	0
	TOTAL NUCLEAR PRODUCTION	1,462,156,689	1,228,171,922
340.1	Land	143,476	0
340.2	Land Rights	2,428	2,428
341	Structures and Improvements	19,329,908	3,170,246
342	Fuel Holders, Producers & Accessories	20,348,101	4,028,686
343	Prime Movers	84,180,491	17,514,367
344	Generators	327,790,471	76,862,684
345	Accessory Electric Equipment	31,697,167	6,602,390
346	Miscellaneous Power Plant Equipment	23,348,784	8,951,914
	TOTAL OTHER PRODUCTION	506,840,826	117,132,715
	TOTAL ELECTRIC PRODUCTION	2,448,289,225	1,479,606,091

<u>No.</u>	<u>Account</u>	<u>Original Cost</u>	<u>Reserve for Depreciation and Amortization</u>
350.1	Land	\$ 40,791,826	\$ 0
350.2	Land Rights	134,464,834	12,224,062
352	Structures and Improvements	284,225,183	36,134,343
353	Station Equipment	949,487,430	157,149,299
354	Towers and Fixtures	701,374,965	86,437,799
355	Poles and Fixtures	258,861,961	50,553,093
356	Overhead Conductors and Devices	414,740,966	170,706,208
357	Underground Conduit	295,392,942	24,191,164
358	Underground Conductors and Devices	321,642,801	26,424,118
359	Roads and Trails	206,994,254	6,903,334
	TOTAL TRANSMISSION	3,607,977,161	570,723,420
360.1	Land	16,176,228	0
360.2	Land Rights	74,791,005	32,760,328
361	Structures and Improvements	3,496,653	1,437,177
362	Station Equipment	400,197,212	81,678,510
364	Poles, Towers and Fixtures	508,637,994	223,883,066
365	Overhead Conductors and Devices	402,003,480	157,035,587
366	Underground Conduit	945,601,054	367,192,293
367	Underground Conductors and Devices	1,260,110,741	738,800,360
368.1	Line Transformers	487,239,414	83,538,405
368.2	Protective Devices and Capacitors	15,756,702	(7,924,463)
369.1	Services Overhead	119,809,666	122,957,079
369.2	Services Underground	304,974,968	213,025,773
370.1	Meters	201,376,778	(12,525,647)
370.2	Meter Installations	46,693,223	(26,440,173)
371	Installations on Customers' Premises	6,477,622	11,178,065
373.1	St. Lighting & Signal Sys.-Transformers	0	0
373.2	Street Lighting & Signal Systems	24,584,469	17,745,317
	TOTAL DISTRIBUTION PLANT	4,817,927,209	2,004,341,677
389.1	Land	7,523,627	0
389.2	Land Rights	0	0
390	Structures and Improvements	30,918,340	18,145,875
392.1	Transportation Equipment - Autos	0	49,884
392.2	Transportation Equipment - Trailers	58,146	1,906
393	Stores Equipment	17,466	15,967
394.1	Portable Tools	19,100,470	5,906,368
394.2	Shop Equipment	328,720	188,001
395	Laboratory Equipment	302,226	38,042
396	Power Operated Equipment	92,162	149,134
397	Communication Equipment	173,881,465	66,841,050
398	Miscellaneous Equipment	1,346,115	168,514
	TOTAL GENERAL PLANT	233,568,736	91,504,742
101	TOTAL ELECTRIC PLANT	11,184,088,919	4,149,797,805

<u>No.</u>	<u>Account</u>	<u>Original Cost</u>	<u>Reserve for Depreciation and Amortization</u>
GAS PLANT			
302	Franchises and Consents	\$ 86,104	\$ 86,104
303	Miscellaneous Intangible Plant	0	0
	TOTAL INTANGIBLE PLANT	86,104	86,104
360.1	Land	0	0
361	Structures and Improvements	43,992	43,992
362.1	Gas Holders	0	0
362.2	Liquefied Natural Gas Holders	0	0
363	Purification Equipment	0	0
363.1	Liquefaction Equipment	0	0
363.2	Vaporizing Equipment	0	0
363.3	Compressor Equipment	0	0
363.4	Measuring and Regulating Equipment	0	0
363.5	Other Equipment	0	0
363.6	LNG Distribution Storage Equipment	2,052,614	666,536
	TOTAL STORAGE PLANT	2,096,606	710,528
365.1	Land	4,649,144	0
365.2	Land Rights	2,217,185	1,206,440
366	Structures and Improvements	11,541,403	9,437,348
367	Mains	127,296,063	60,198,107
368	Compressor Station Equipment	80,018,162	56,806,369
369	Measuring and Regulating Equipment	18,692,709	14,462,516
371	Other Equipment	0	0
	TOTAL TRANSMISSION PLANT	244,414,667	142,110,780
374.1	Land	102,187	0
374.2	Land Rights	8,120,130	5,978,457
375	Structures and Improvements	43,447	61,253
376	Mains	555,300,897	318,107,712
378	Measuring & Regulating Station Equipment	14,781,913	6,691,335
380	Distribution Services	242,008,837	279,701,774
381	Meters and Regulators	136,639,615	36,561,568
382	Meter and Regulator Installations	85,851,567	25,012,871
385	Ind. Measuring & Regulating Station Equipm	1,516,811	1,003,379
386	Other Property On Customers' Premises	0	0
387	Other Equipment	5,223,272	4,627,172
	TOTAL DISTRIBUTION PLANT	1,049,588,675	677,745,522

<u>No.</u>	<u>Account</u>	<u>Original Cost</u>	<u>Reserve for Depreciation and Amortization</u>
392.1	Transportation Equipment - Autos	\$ 0	\$ 25,503
392.2	Transportation Equipment - Trailers	74,501	74,501
394.1	Portable Tools	7,107,306	2,972,222
394.2	Shop Equipment	76,864	27,439
395	Laboratory Equipment	283,094	228,280
396	Power Operated Equipment	162,284	87,453
397	Communication Equipment	1,364,787	918,527
398	Miscellaneous Equipment	198,325	49,907
	TOTAL GENERAL PLANT	9,267,160	4,383,833
101	TOTAL GAS PLANT	1,305,453,212	825,036,767
COMMON PLANT			
303	Miscellaneous Intangible Plant	183,992,178	95,881,299
350.1	Land	0	0
360.1	Land	0	0
389.1	Land	5,612,511	0
389.2	Land Rights	1,080,961	27,275
390	Structures and Improvements	237,279,087	99,837,420
391.1	Office Furniture and Equipment - Other	18,852,648	9,431,477
391.2	Office Furniture and Equipment - Computer E	66,274,174	29,884,994
392.1	Transportation Equipment - Autos	33,942	(338,930)
392.2	Transportation Equipment - Trailers	33,369	(2,981)
393	Stores Equipment	144,926	76,807
394.1	Portable Tools	1,193,702	120,503
394.2	Shop Equipment	248,289	136,092
394.3	Garage Equipment	951,232	(96,788)
395	Laboratory Equipment	2,236,234	843,146
396	Power Operated Equipment	0	(192,979)
397	Communication Equipment	103,720,160	44,874,358
398	Miscellaneous Equipment	2,432,614	816,209
118.1	TOTAL COMMON PLANT	624,086,029	281,297,902
	TOTAL ELECTRIC PLANT	11,184,088,919	4,149,797,805
	TOTAL GAS PLANT	1,305,453,212	825,036,767
	TOTAL COMMON PLANT	624,086,029	281,297,902
101 & 118.1	TOTAL	13,113,628,161	5,256,132,475
101	PLANT IN SERV-SONGS FULLY RECOVER	\$ (1,164,131,236)	\$ (1,164,131,236)
101	PLANT IN SERV-ELECTRIC NON-RECON Electric	\$ 0	\$ 0
101	PLANT IN SERV-LEGACY METER RECLASS Electric	\$ (23,359,008)	\$ 66,572,150
118	PLANT IN SERV-COMMON NON-RECON Common - Transferred Asset Adjustment	\$ (2,894,035)	\$ (2,894,035)

<u>No.</u>	<u>Account</u>	<u>Original Cost</u>	<u>Reserve for Depreciation and Amortization</u>
101	Accrual for Retirements		
	Electric	\$ (4,646,396)	\$ (4,646,396)
	Gas	(137,984)	(137,984)
	TOTAL PLANT IN SERV-ACCRUAL FOR RE	<u>(4,784,380)</u>	<u>(4,784,380)</u>
102	Electric	0	0
	Gas	0	0
	TOTAL PLANT PURCHASED OR SOLD	<u>0</u>	<u>0</u>
105	Plant Held for Future Use		
	Electric	8,152,834	0
	Gas	0	0
	TOTAL PLANT HELD FOR FUTURE USE	<u>8,152,834</u>	<u>0</u>
107	Construction Work in Progress		
	Electric	598,501,813	
	Gas	42,640,107	
	Common	60,958,370	
	TOTAL CONSTRUCTION WORK IN PROGRESS	<u>702,100,290</u>	<u>0</u>
108	Accum. Depr SONGS Mitigation/Spent Fuel Disallowance		
	Electric	0	221,468
108.5	Accumulated Nuclear Decommissioning		
	Electric	0	760,296,087
	TOTAL ACCUMULATED NUCLEAR DECOMMISSIONING	<u>0</u>	<u>760,296,087</u>
101.1	ELECTRIC CAPITAL LEASES	778,390,265	67,939,606
118.1	COMMON CAPITAL LEASE	25,855,774	16,025,422
		<u>804,246,039</u>	<u>83,965,028</u>
120	NUCLEAR FUEL FABRICATION	<u>62,963,775</u>	<u>40,861,208</u>
143	FAS 143 ASSETS - Legal Obligation	116,218,782	(648,662,581)
	FIN 47 ASSETS - Non-Legal Obligation	72,842,470	29,670,565
143	FAS 143 ASSETS - Legal Obligation	0	(1,313,847,687)
	TOTAL FAS 143	189,061,252	(1,932,839,703)
	UTILITY PLANT TOTAL	<u>\$ 13,684,983,692</u>	<u>\$ 3,103,399,061</u>

ATTACHMENT C
San Diego Gas & Electric Company Total Regulatory Capitalization
June 30, 2012
(\$ Millions)

<u>No.</u>	<u>Interest %</u> <u>31-Mar</u>	<u>Bond</u>	<u>Maturity</u>	<u>Principal</u> <u>(\$ millions)</u>
1	6.800%	SERIES KK	6/01/15	14.4
2	5.000%	SERIES OO-2	12/01/27	60.0
3	5.250%	SERIES OO-3	12/01/27	45.0
4	5.000%	SERIES OO-4	12/01/27	45.0
5	5.850%	SERIES RR	6/01/21	60.0
6	5.875%	SERIES VV (CV2004A)	2/15/34	43.6
7	5.875%	SERIES WW (CV2004B)	2/15/34	40.0
8	5.875%	SERIES XX (CV2004C)	2/15/34	35.0
9	5.875%	SERIES YY (CV2004D)	1/01/34	24.0
10	5.875%	SERIES ZZ (CV2004E)	1/01/34	33.7
11	Var	SERIES AAA (CV2004F)	5/01/39	75.0
12	5.350%	SERIES BBB	5/15/35	250.0
13	5.300%	SERIES CCC	11/15/15	250.0
14	6.000%	SERIES DDD	6/1/26	250.0
15	Var	SERIES EEE	7/1/18	161.2
16	6.125%	SERIES FFF	9/15/37	250.0
17	6.000%	SERIES GGG	6/1/39	300.0
18	5.350%	SERIES HHH	5/15/40	250.0
19	4.500%	SERIES III	8/15/40	500.0
20	3.000%	SERIES JJJ	8/15/21	350.0
21	3.950%	SERIES LLL	11/15/41	250.0
22	4.300%	SERIES MMM	4/1/42	250.0
Total First Mortgage Bonds				<u>3,536.9</u>
Other Long-Term Debt				
22	5.900%	CPCFA96A	6/01/14	129.8
23	5.300%	CV96A	7/01/21	38.9
24	5.500%	CV96B	12/01/21	60.0
25	4.900%	CV97A	3/01/23	25.0
Total Other Long-Term Debt				253.7
Long-Term Debt before Unamortized premiums, issue expenses & loss on reacquired debt net of tax				3,790.6
Unamortized discount less premium				(12.0)
Unamortized issued expense				(34.9)
Unamortized loss on reacquired debt net of tax				(10.7)
Long-Term Debt net of Unamortized premiums, issue expenses & loss on reacquired debt net of tax				3,733.0
Equity Capital				
Common Stock Equity				3,940.6
Preferred Stock Equity				78.5
Total Equity				<u>4,019.1</u>
Total Regulatory Capitalization				<u><u>7,752.1</u></u>

APPENDIX C

**SAN DIEGO GAS & ELECTRIC COMPANY
SUMMARY OF EARNINGS
SIX MONTHS ENDED JUNE 30, 2012
(DOLLARS IN MILLIONS)**

<u>Line No.</u>	<u>Item</u>	<u>Amount</u>
1	Operating Revenue	\$2,001
2	Operating Expenses	<u>1,797</u>
3	Net Operating Income	<u><u>\$204</u></u>
4	Weighted Average Rate Base	\$5,259
5	Rate of Return*	8.40%

*Authorized Cost of Capital

APPENDIX D

State of California
Attorney General's Office
P.O. Box 944255
Sacramento, CA 94244-2550

Naval Facilities Engineering
Command
Navy Rate Intervention
1314 Harwood Street SE
Washing Navy Yard, DC 20374

City of Carlsbad
Attn. City Attorney
1200 Carlsbad Village Drive
Carlsbad, CA 92008-19589

City of Chula Vista
Attn. City Attorney
276 Fourth Ave
Chula Vista, Ca 91910-2631

City of Dana Point
Attn. City Attorney
33282 Golden Lantern
Dana Point, CA 92629

City of Del Mar
Attn. City Clerk
1050 Camino Del Mar
Del Mar, CA 92014

City of Encinitas
Attn. City Attorney
505 S. Vulcan Ave.
Encinitas, CA 92024

City of Escondido
Attn. City Attorney
201 N. Broadway
Escondido, CA 92025

City of Imperial Beach
Attn. City Clerk
825 Imperial Beach Blvd
Imperial Beach, CA 92032

City of Laguna Beach
Attn. City Clerk
505 Forest Ave
Laguna Beach, CA 92651

State of California
Attn. Director Dept of General
Services
PO Box 989052
West Sacramento, CA 95798-9052

Alpine County
Attn. County Clerk
99 Water Street, P.O. Box 158
Markleeville, CA 96120

City of Carlsbad
Attn. Office of the County Clerk
1200 Carlsbad Village Drive
Carlsbad, CA 92008-19589

City of Coronado
Attn. Office of the City Clerk
1825 Strand Way
Coronado, CA 92118

City of Dana Point
Attn. City Clerk
33282 Golden Lantern
Dana Point, CA 92629

City of El Cajon
Attn. City Clerk
200 Civic Way
El Cajon, CA 92020

City of Encinitas
Attn. City Clerk
505 S. Vulcan Ave.
Encinitas, CA 92024

City of Fallbrook
Chamber of Commerce
Attn. City Clerk
111 S. Main Avenue
Fallbrook, CA 92028

City of Imperial Beach
Attn. City Attorney
825 Imperial Beach Blvd
Imperial Beach, CA 92032

City of Laguna Beach
Attn. City Attorney
505 Forest Ave
Laguna Beach, CA 92651

United States Government
General Services Administration
300 N. Los Angeles
Los Angeles, CA 90012

Borrego Springs Chamber of
Commerce Attn. City Clerk
786 Palm Canyon Dr
PO Box 420
Borrego Springs CA 92004-0420

City of Chula Vista
Attn: Office of the City Clerk
276 Fourth Avenue
Chula Vista, California 91910-2631

City of Coronado
Attn. City Attorney
1825 Strand Way
Coronado, CA 92118

City of Del Mar
Attn. City Attorney
1050 Camino Del Mar
Del Mar, CA 92014

City of El Cajon
Attn. City Attorney
200 Civic Way
El Cajon, CA 92020

City of Escondido
Attn. City Clerk
201 N. Broadway
Escondido, CA 92025

City of Fallbrook
Chamber of Commerce
Attn. City Attorney
111 S. Main Avenue
Fallbrook, CA 92028

Julian Chamber of Commerce
P.O. Box 1866
2129 Main Street
Julian, CA

City of Laguna Niguel
Attn. City Attorney
30111 Crown Valley Parkway
Laguna Niguel, California 92677

City of Laguna Niguel
Attn. City Clerk
30111 Crown Valley Parkway
Laguna Niguel, California 92677

City of Lakeside
Attn. City Clerk
9924 Vine Street
Lakeside CA 92040

City of La Mesa
Attn. City Attorney
8130 Allison Avenue
La Mesa, CA 91941

City of La Mesa
Attn. City Clerk
8130 Allison Avenue
La Mesa, CA 91941

City of Lemon Grove
Attn. City Clerk
3232 Main St.
Lemon Grove, CA 92045

City of Lemon Grove
Attn. City Attorney
3232 Main St.
Lemon Grove, CA 92045

City of Mission Viejo
Attn: City Clerk
200 Civic Center
Mission Viejo, CA 92691

City of Mission Viejo
Attn: City Attorney
200 Civic Center
Mission Viejo, CA 92691

City of National City
Attn. City Clerk
1243 National City Blvd
National City, CA 92050

City of National City
Attn. City Attorney
1243 National City Blvd
National City, CA 92050

City of Oceanside
Attn. City Clerk
300 N. Coast Highway
Oceanside, CA 92054-2885

City of Oceanside
Attn. City Attorney
300 N. Coast Highway
Oceanside, CA 92054-2885

County of Orange
Attn. County Counsel
P.O. Box 1379
Santa Ana, CA 92702

County of Orange
Attn. County Clerk
12 Civic Center Plaza, Room 101
Santa Ana, CA 92701

City of Poway
Attn. City Clerk
P.O. Box 789
Poway, CA 92064

City of Poway
Attn. City Attorney
P.O. Box 789
Poway, CA 92064

City of Ramona
Attn. City Clerk
960 Main Street
Ramona, CA 92065

City of Ramona
Attn. City Attorney
960 Main Street
Ramona, CA 92065

City of Rancho San Diego - Jamul
Attn. City Clerk
3855 Avocado Blvd.
Suite 230
La Mesa, CA 91941

City of San Clemente
Attn. City Clerk
100 Avenida Presidio
San Clemente, CA 92672

City of San Clemente
Attn. City Attorney
100 Avenida Presidio
San Clemente, CA 92672

City of San Diego
Attn. Mayor
202 C Street, 11th Floor
San Diego, CA 92101

County of San Diego
Attn. County Clerk
P.O. Box 121750
San Diego, CA 92101

City of San Diego
Attn. City Attorney
1200 Third Ave.
Suite 1620
San Diego, CA 92101

County of San Diego
Attn. County Counsel
1600 Pacific Hwy
San Diego, CA 92101

City of San Diego
Attn. City Clerk
202 C Street, 2nd Floor
San Diego, CA 92101

City of San Marcos
Attn. City Clerk
1 Civic Center Dr.
San Marcos, CA 92069

City of San Marcos
Attn. City Attorney
1 Civic Center Dr.
San Marcos, CA 92069

City of Santee
Attn. City Clerk
10601 Magnolia Avenue
Santee, CA 92071

City of Santee
Attn. City Attorney
10601 Magnolia Avenue
Santee, CA 92071

City of Solana Beach
Attn. City Attorney
635 S. Highway 101
Solana Beach, CA 92075

Spring Valley Chamber of
Commerce
Attn. City Clerk
3322 Sweetwater Springs Blvd,
Ste. 202
Spring Valley, CA 91977-3142

Valley Center Chamber of
Commerce
Attn. City Clerk
P.O. Box 8
Valley Center, CA 92082

City of Vista
Attn. City Attorney
200 Civic Center Drive, Bldg. K
Vista, CA 92084

City of Vista
Attn. City Clerk
200 Civic Center Drive
Vista, CA 92084

City of Aliso Viejo
12 Journey
Aliso Viejo, CA 92656

ATTACHMENT A

**PY 2015-2017 Energy Savings Assistance Program Proposed Electric & Gas Budget
San Diego Gas & Electric Company**

	PY2014 Authorized	PY 2015 Year-End Projected	PY 2016 Year-End Projected	PY 2017 Year-End Projected
Energy Savings Assistance Program				
Energy Efficiency				
Appliances	\$4,932,533	\$4,932,533	\$5,079,788	\$5,232,181
Domestic Hot Water	\$2,055,518	\$2,055,518	\$2,117,184	\$2,180,699
Enclosure	\$4,589,847	\$4,589,847	\$4,727,520	\$4,869,344
HVAC	\$3,927,857	\$3,927,857	\$4,045,422	\$4,166,785
Maintenance	\$570,879	\$570,879	\$588,005	\$605,646
Lighting	\$2,775,286	\$2,775,285	\$3,539,066	\$3,645,238
Miscellaneous	\$484,540	\$484,540	\$618,041	\$636,582
Customer Enrollment	\$3,385,641	\$3,385,641	\$4,015,210	\$4,135,667
In Home Education	\$430,334	\$430,334	\$443,244	\$456,541
Pilot				
Fund Shifting Offset	-\$3,132,739	-\$3,132,739	\$0	\$0
Energy Efficiency Total	\$20,019,695	\$20,019,695	\$25,173,480	\$25,928,683
Training Center	\$0	\$42,500	\$469,445	\$325,154
Inspections	\$99,206	\$98,570	\$147,838	\$151,848
Marketing and Outreach	\$1,164,718	\$1,240,563	\$1,827,695	\$2,137,066
Statewide Marketing Education and Outreach	\$0	\$0	\$60,000	\$60,000
Measurement and Evaluation Studies	\$115,000	\$77,500	\$77,500	\$77,500
Regulatory Compliance	\$322,214	\$261,743	\$268,592	\$275,757
General Administration	\$2,006,417	\$1,986,680	\$2,579,956	\$2,630,913
CPUC Energy Division	\$45,000	\$45,000	\$45,000	\$45,000
TOTAL PROGRAM COSTS	\$23,772,250	\$23,772,250	\$30,649,505	\$31,631,921
	Funded Outside of ESAP Program Budget			
Indirect Costs				
NGAT Costs ¹	\$368,000	\$368,000	\$368,000	\$368,000

1. NGAT costs reflect amounts authorized in GRC D.13-05-010.

**PY 2015-2017 Energy Savings Assistance Program Proposed Electric Budget
San Diego Gas & Electric Company**

	PY2014 Authorized	PY 2015 Year-End Projected	PY 2016 Year-End Projected	PY 2017 Year-End Projected
Energy Savings Assistance Program				
Energy Efficiency				
Appliances	\$3,630,829	\$3,589,014	\$3,696,036	\$3,806,917
Domestic Hot Water	\$61,666	\$61,666	\$63,516	\$65,421
Enclosure	\$1,973,634	\$1,819,534	\$1,855,673	\$1,911,343
HVAC	\$392,199	\$403,997	\$416,116	\$428,600
Maintenance	\$4,464	\$13,500	\$13,905	\$14,322
Lighting	\$2,775,286	\$2,775,285	\$3,539,066	\$3,645,238
Miscellaneous	\$484,540	\$484,540	\$618,041	\$636,582
Customer Enrollment	\$1,692,821	\$1,692,821	\$2,007,605	\$2,067,833
In Home Education	\$215,167	\$215,167	\$221,622	\$228,271
Pilot				
Fund Shifting Offset	-\$499,405	-\$499,405		
Energy Efficiency Total	\$10,731,200	\$10,556,118	\$12,431,580	\$12,804,527
Energy Conservation				
Training Center	\$0	\$21,250	\$234,722	\$162,577
Inspections	\$49,603	\$49,285	\$73,919	\$75,924
Marketing and Outreach	\$582,359	\$620,282	\$913,848	\$1,068,533
Statewide Marketing Education and Outreach	\$0	\$0	\$30,000	\$30,000
Measurement and Evaluation Studies	\$57,500	\$38,750	\$38,750	\$38,750
Regulatory Compliance	\$161,107	\$130,871	\$134,296	\$137,878
General Administration	\$1,003,209	\$993,340	\$1,289,978	\$1,315,456
CPUC Energy Division	\$22,500	\$22,500	\$22,500	\$22,500
TOTAL PROGRAM COSTS	\$12,607,478	\$12,432,395	\$15,169,593	\$15,656,147
Funded Outside of ESAP Program Budget				
Indirect Costs				
NGAT Costs				

**PY 2015-2017 Energy Savings Assistance Program Proposed Gas Budget
San Diego Gas & Electric Company**

	PY2014 Authorized	PY 2015 Year-End Projected	PY 2016 Year-End Projected	PY 2017 Year-End Projected
Energy Savings Assistance Program				
Energy Efficiency				
Appliances	\$1,301,704	\$1,343,518	\$1,383,752	\$1,425,264
Domestic Hot Water	\$1,993,852	\$1,993,852	\$2,053,668	\$2,115,278
Enclosure	\$2,616,213	\$2,770,313	\$2,871,846	\$2,958,001
HVAC	\$3,535,658	\$3,523,860	\$3,629,306	\$3,738,185
Maintenance	\$566,414	\$557,379	\$574,100	\$591,323
Lighting	\$0	\$0	\$0	\$0
Miscellaneous	\$0	\$0	\$0	\$0
Customer Enrollment	\$1,692,821	\$1,692,821	\$2,007,605	\$2,067,833
In Home Education	\$215,167	\$215,167	\$221,622	\$228,271
Pilot				
Fund Shifting Offset	-\$2,633,333			
Energy Efficiency Total	\$9,288,495	\$9,463,577	\$12,741,899	\$13,124,155
Training Center				
Inspections	\$49,603	\$21,250	\$234,722	\$162,577
Marketing and Outreach	\$582,359	\$620,282	\$73,919	\$75,924
Statewide Marketing Education and Outreach	\$0	\$0	\$913,848	\$1,068,533
Measurement and Evaluation Studies	\$57,500	\$38,750	\$30,000	\$30,000
Regulatory Compliance	\$161,107	\$130,871	\$38,750	\$38,750
General Administration	\$1,003,209	\$993,340	\$134,296	\$137,878
CPUC Energy Division	\$22,500	\$22,500	\$1,289,978	\$1,315,456
			\$22,500	\$22,500
TOTAL PROGRAM COSTS	\$11,164,773	\$11,339,855	\$15,479,912	\$15,975,775
Funded Outside of ESAP Program Budget				
Indirect Costs				
NGAT Costs ¹	\$368,000	\$368,000	\$368,000	\$368,000

1. NGAT costs reflect amounts authorized in GRC D.13-05-010.

PY 2015-2017 Energy Savings
San Diego Gas & Electric Company

Measures*	Units	PY 2014 Authorized				PY 2015 Planned				PY 2016 Planned				PY 2017 Planned					
		Quantity Installed	kWh (Annual)	kW (Annual)	Therms (Annual)	Quantity Installed	kWh (Annual)	kW (Annual)	Therms (Annual)	Quantity Installed	kWh (Annual)	kW (Annual)	Therms (Annual)	Quantity Installed	kWh (Annual)	kW (Annual)	Therms (Annual)		
Appliances																			
High Efficiency Clothes Washer	Each	2,100	27,899	-	35,738	1,985	12,171	2	29,912	1,429,200	1,429,200	12,171	2	29,912	1,472,076	1,472,076	12,171	2	29,912
Refrigerators	Each	3,665	1,424,460	243	1,486	3,650	2,254,147	266	2,666	2,690,950	2,690,950	2,254,147	266	2,666	3,018,879	3,018,879	2,254,147	266	2,666
Microwaves	Each	617	277,494	-	121,745	5,725	26,475	5	125,557	572,363	572,363	26,475	5	125,463	588,833	588,833	26,475	5	125,463
Domestic Hot Water																			
Water Heater Blanket	Home	884	191	0	1,007	870	99	0	372	47,311	47,311	99	0	372	48,730	48,730	99	0	372
Low Flow ShowerHead	Home	14,720	18,441	6	39,417	11,100	1,989	0	5,858	698,788	698,788	1,989	0	5,858	719,571	719,571	1,989	0	5,858
Water Heater Pipe Insulation	Home	1,818	2,172	1	1,486	1,790	7,857	-	51	36,713	36,713	1,790	-	51	37,814	37,814	1,790	-	51
Faucet Aerator	Home	15,432	11,839	5	28,887	17,900	1,950	0	4,790	208,535	208,535	1,950	0	4,790	214,791	214,791	1,950	0	4,790
Water Heater Repair/Replacement	Each	436	-	-	-	1,300	426,094	-	8,840	338,547	338,547	1,300	-	8,840	348,703	348,703	1,300	-	8,840
Thermostatic Shower Valve	Each	5,892	146,792	-	75,388	5,000	17,436	2	11,089	309,979	309,979	17,436	2	11,089	309,979	309,979	17,436	2	11,089
New - Combined Showerhead/TSV	Each	-	-	-	-	4,500	15,735	2	41,216	189,000	189,000	15,735	2	41,216	194,670	194,670	15,735	2	41,216
New - Heat Pump Water Heater	Each	-	-	-	-	23	69,975	7	45,175	89,975	89,975	69,975	7	45,175	94,620	94,620	69,975	7	45,175
New - Tub Diverter	Each	-	-	-	-	2,500	8,862	1	4,662	187,500	187,500	8,862	1	4,662	193,125	193,125	8,862	1	4,662
Enclosure																			
Air Sealing [1]	Home	13,154	565,352	-	41,358	13,090	291,947	61	36,022	4,000,000	4,000,000	291,947	61	36,022	4,119,909	4,119,909	291,947	61	36,022
Caulking	Home	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Weatherstripping	Home	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Utility Gaskets	Home	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Attic Access Weatherstripping	Home	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Evaporative Cooler Cover	Home	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
AC-Vent Cover	Each	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Attic Insulation	Home	560	64,205	-	6,090	550	24,130	5	14,267	589,847	589,847	24,130	5	14,267	607,611	607,611	24,130	5	14,267
HVAC																			
FAU Standing Pilot Light Conversion	Each	305	-	-	1,314	380	99,040	-	5,738	123,120	123,120	380	-	5,738	126,814	126,814	380	-	5,738
Furnace Repair/Replacement	Each	5,300	-	-	-	5,229	3,324,485	-	3,108,354	3,108,354	5,229	-	3,108,354	3,297,375	3,297,375	5,229	-	3,108,354	
Room A/C Replacement	Each	444	5,880	8	-	220	392,199	1	-	231,997	231,997	5,540	1	-	238,956	238,956	5,540	1	-
Central A/C Replacement	Each	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Heat Pump Replacement	Each	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Evaporative Coolers (Replacement)	Each	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Evaporative Coolers (Installation)	Each	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Duct Testing and Sealing	Home	758	-	-	-	350	112,133	0	5,007	60,606	60,606	111	0	5,007	62,424	62,424	111	0	5,007
New - Energy Efficient Fan Control	Home	-	-	-	-	25	2,763	-	3,780	3,780	3,780	25	-	3,893	3,893	3,893	25	-	3,893
New - Prescriptive Duct Sealing	Home	-	-	-	-	10,000	74,000	-	-	400,000	400,000	74,000	-	-	412,000	412,000	74,000	-	-
Maintenance																			
Furnace Clean and Tune	Home	9,264	-	-	14,001	7,285	566,414	-	74,986	557,379	557,379	7,285	-	74,986	574,100	574,100	7,285	-	74,986
Central A/C Tune-up	Home	33	280	-	-	100	4,464	-	13,500	13,500	13,500	100	-	13,905	13,905	13,905	100	-	13,905
Evaporative Cooler Maintenance	Home	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Lighting																			
Compact Fluorescent Lights (CFLs)	Each	103,315	2,134,883	244	-	135,000	2,359,700	286	-	1,089,285	1,089,285	135,000	-	-	-	-	135,000	-	-
Interior Hard wired CFL fixtures	Each	11,855	101,285	27	-	961,246	146,965	-	266,000	266,000	266,000	3,500	-	273,980	273,980	273,980	3,500	-	273,980
Exterior Hard wired CFL fixtures	Each	2,817	94,045	-	-	2,800	170,937	8	-	156,800	156,800	2,800	-	161,504	161,504	161,504	2,800	-	161,504
Torchiere	Each	6,506	1,551,172	162	-	9,680	690,115	28	-	871,200	871,200	9,680	-	897,336	897,336	897,336	9,680	-	897,336
Occupancy Sensor	Each	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
LED Night Lights	Each	50,790	562,177	-	-	20,000	174,677	422	-	180,000	180,000	20,000	-	224,778	224,778	224,778	422	-	224,778
New - LED Diffuse Bulb (60W Replace)[2]	Each	-	-	-	-	10,000	143,300	14	(2,640)	140,000	140,000	134,999	1,934,536	192	(35,640)	1,946,666	134,999	1,934,536	192
New - LED Reflector Bulb (B530 Recessed Can)[2]	Each	-	-	-	-	3,000	80,631	8	(1,350)	72,000	72,000	3,000	80,631	8	(1,350)	74,160	3,000	80,631	8
Miscellaneous																			
Smart Strip	Each	10,158	888,021	-	-	12,820	314,080	-	-	484,540	484,540	-	-	-	-	-	-	-	-
Pool Pumps	Each	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
New - Smart Strip Tier II	Each	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Pilots																			
Customer Enrollment																			
Customer Enrollment																			
Outreach & Assessment	Home	20,316	-	-	-	20,316	3,385,641	-	-	3,385,641	3,385,641	20,316	-	-	4,015,210	4,015,210	20,316	-	-
In-Home Education	Home	19,134	-	-	-	20,316	430,334	-	-	430,334	430,334	20,316	-	-	443,244	443,244	20,316	-	-
Fund shifting Offset							(3,132,739)			(3,132,739)	(3,132,739)								
Total																			
		7,886,586	697,366,432	697,366,432	366,432	20,019,695	6,238,616	1,134	364,377	20,019,695	20,019,695	6,238,616	1,134	364,377	25,173,480	25,173,480	6,238,616	1,134	364,377

* Include all proposed new measures, where appropriate.
 (1) The Air Sealing measures include: Caulking, Weatherstripping, Utility Gaskets, Attic Access Weatherstripping, Evaporative Cooler Cover, AC Vent Cover, and Minor Home Repair.
 (2) The new lighting measures (LED diffuse bulb and LED reflector bulb) show positive kWh savings along with negative therm savings (interactive effects). The savings estimates for these measures are the deemed savings used in the energy efficiency programs which include negative therm savings (interactive effects). Savings estimates for the remaining lighting measures were obtained from the most recent ESA Impact Evaluation.

Energy Savings Assistance Program Penetration San Diego Gas & Electric Company

Program Year	Number of Customers in Utility Service Area	Number of Eligible Low Income Customers*	Number of Customers Served by ESAP since 2002	Number of Customers Served by CSD since 2002	Number of Customers Enrolled in CARE	Number of Eligible and Willing ESAP Customers**	Homes Treated by ESAP Program	Percent of ESAP Programmatic Initiative Achieved
PY 2007	1,243,769	364,904	84,982	7,700	229,759		13,074	
PY 2008	1,260,513	345,256	105,786	8,983	241,196		20,804	
PY 2009	1,242,575	343,860	126,713	10,532	269,517		20,927	
PY 2010	1,232,431	353,206	148,306	12,081	293,438		21,593	
PY 2011	1,252,548	352,952	168,690	13,630	310,757		20,384	
PY 2012	1,265,073	356,482	191,105	15,179	324,967		22,415	
PY 2013	1,277,724	376,427	208,673	16,729	300,554		17,568	
PY 2014	1,290,501	380,191	228,989	18,122	290,554	70,381	20,316	76%
PY 2015	1,303,406	383,993	249,305	19,516	298,554	50,065	20,316	83%
PY 2016	1,316,441	387,833	269,621	20,910	315,554	29,749	20,316	90%
PY 2017	1,329,605	391,711	289,937	22,304	335,554	9,433	20,316	97%
PY 2018	1,342,901	395,629	299,370	23,698		-	9,433	100%
PY 2019	1,356,330	399,585	299,370	25,092				
PY 2020	1,369,893	403,581	299,370	26,489				

* Number of eligible low income customers to be based on customers at or below 200 percent of the Federal Poverty Line.

** Number of eligible and willing ESAP customers based on utility's proposed "standard means of deriving the number of ESAP customers on which to reaching 1/2 of the Commission's programmatic initiative," as discussed in Section III.

Notes:

Table reflects end of year values.

Values in columns labeled "Number of Customers Served by ESAP since 2002" and "Number of Customers Served by CSD since 2002" are cumulative. Values in rows labeled PY2014 through PY2020 are estimated.

Section B3 of the Testimony of Sandra Williams contains a detailed discussion of how the number of willing customers was estimated.

**Summary of Energy Savings Assistance Program Cost Effectiveness
San Diego Gas & Electric Company**

Program Year	Ratio of Benefits Over Costs		Net Benefits \$	
	ESACET	ResourceTRC	ESACET	ResourceTRC
2015	0.79	0.58	(5,517,634)	(6,596,793)
2016-2017	0.78	0.59	(12,819,005)	(14,257,460)

Notes:

- All program measures "resource and non-resource measures" are included in the ESACET. Only measures considered "resource measures" are included in the Resource TRC.
- The ESACET includes energy and non-energy benefits and all program costs including measure, installation, and administrative costs.
- The Resource TRC includes energy benefits and program measure and installation costs.
- Ordering Paragraph 43 of D.14-08-030 directs the application of the two new cost effectiveness tests, ESACET and Resource TRC, by replacing the existing tests shown below in the table.

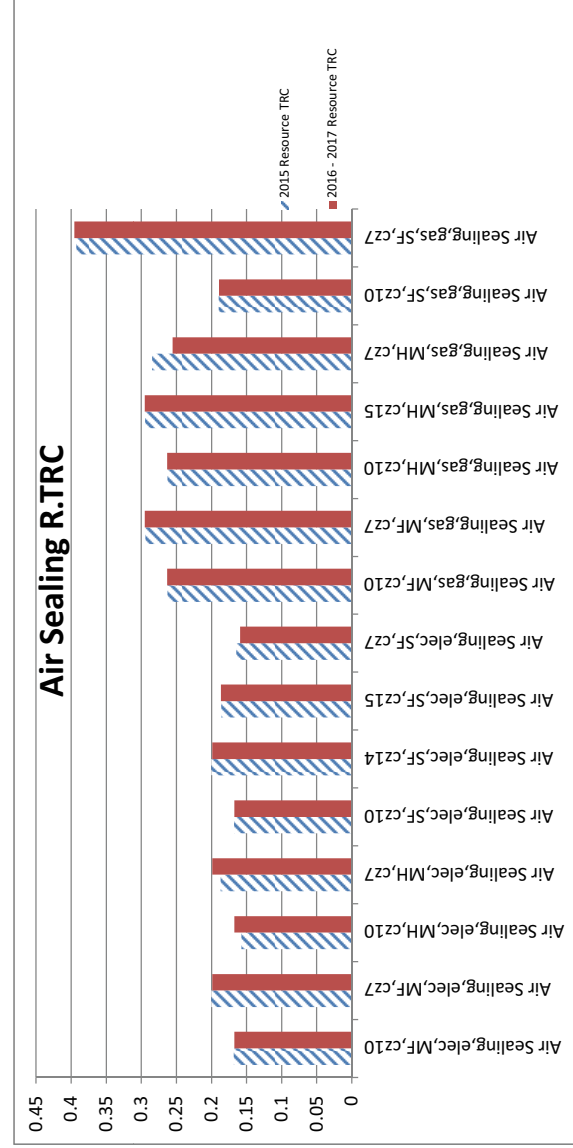
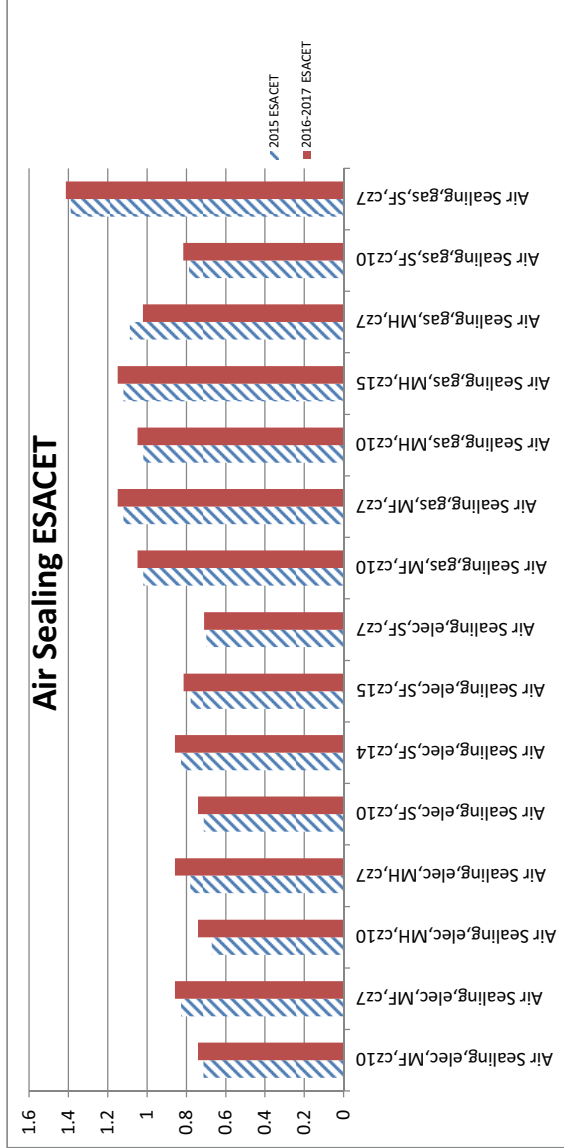
Program Year	Ratio of Benefits Over Costs			Net Benefits \$		
	Utility Cost Test	Total Resource Cost Test	Modified Participant Test	Utility Cost Test	Total Resource Cost Test	Modified Participant Test
2013	0.51	0.40	0.60	(8,155,801)	(9,943,021)	(7,146,892)
2012	0.68	0.53	0.86	(6,858,625)	(10,037,753)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

Energy Savings Assistance Program Cost-Effectiveness - Weather Sensitive Measures
 San Diego Gas & Electric Company

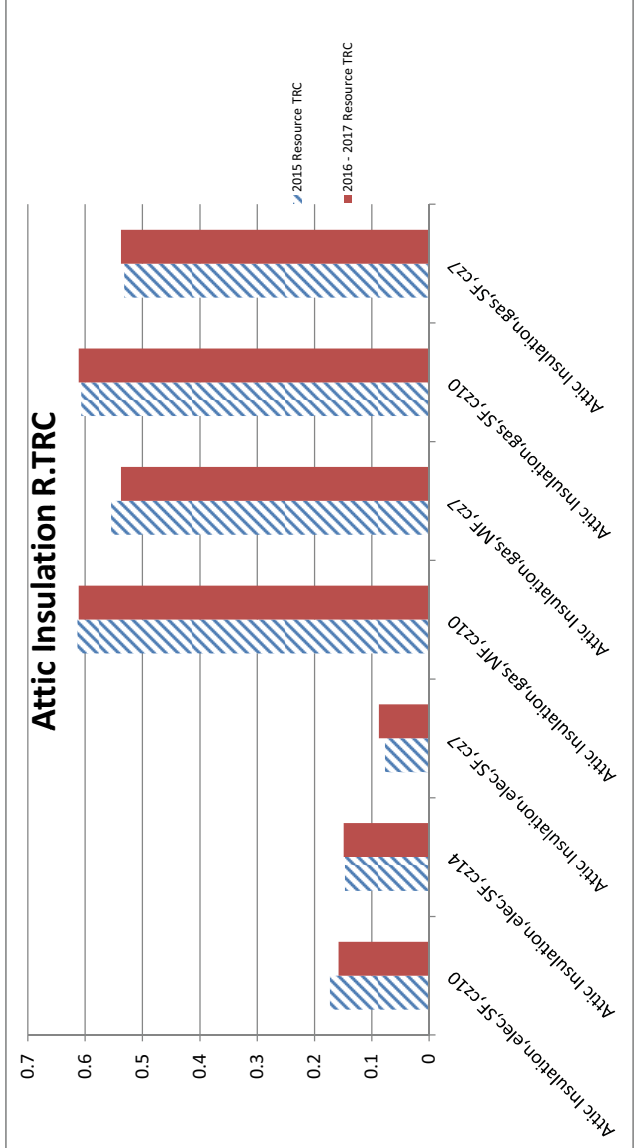
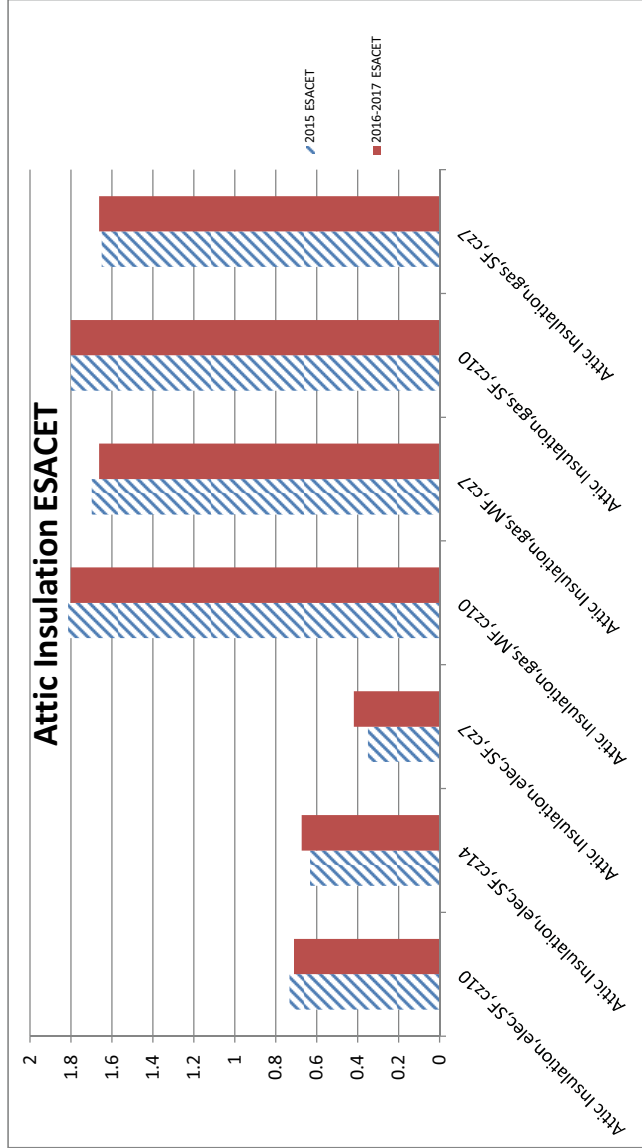
Measure	Measure Group	Type of Measure	Type of Home	Electric or Gas	Climate Zone	Ratio of Benefits over Costs			
						2015 ESACET	2015 Resource TRC	2016-2017 ESACET	2016 - 2017 Resource TRC
Air Sealing	Enclosure	Resource	MF	elec	10	0.71	0.17	0.74	0.17
Air Sealing	Enclosure	Resource	MF	elec	7	0.83	0.20	0.86	0.20
Air Sealing	Enclosure	Resource	MH	elec	10	0.67	0.16	0.74	0.17
Air Sealing	Enclosure	Resource	MH	elec	7	0.78	0.19	0.86	0.20
Air Sealing	Enclosure	Resource	SF	elec	10	0.71	0.17	0.74	0.17
Air Sealing	Enclosure	Resource	SF	elec	14	0.83	0.20	0.86	0.20
Air Sealing	Enclosure	Resource	SF	elec	15	0.78	0.19	0.81	0.19
Air Sealing	Enclosure	Resource	SF	elec	7	0.70	0.16	0.71	0.16
Air Sealing	Enclosure	Resource	MF	gas	10	1.02	0.26	1.05	0.26
Air Sealing	Enclosure	Resource	MF	gas	7	1.12	0.29	1.15	0.29
Air Sealing	Enclosure	Resource	MH	gas	10	1.02	0.26	1.05	0.26
Air Sealing	Enclosure	Resource	MH	gas	15	1.12	0.29	1.15	0.29
Air Sealing	Enclosure	Resource	MH	gas	7	1.09	0.28	1.02	0.26
Air Sealing	Enclosure	Resource	SF	gas	10	0.79	0.19	0.82	0.19
Air Sealing	Enclosure	Resource	SF	gas	7	1.39	0.39	1.41	0.40
Attic Insulation	Enclosure	Resource	SF	elec	10	0.73	0.17	0.71	0.16
Attic Insulation	Enclosure	Resource	SF	elec	14	0.63	0.15	0.67	0.15
Attic Insulation	Enclosure	Resource	SF	elec	7	0.35	0.08	0.42	0.09
Attic Insulation	Enclosure	Resource	MF	gas	10	1.81	0.61	1.80	0.61
Attic Insulation	Enclosure	Resource	MF	gas	7	1.70	0.55	1.66	0.54
Attic Insulation	Enclosure	Resource	SF	gas	10	1.80	0.61	1.80	0.61
Attic Insulation	Enclosure	Resource	SF	gas	7	1.65	0.53	1.66	0.54
Duct Testing and Sealing	HVAC	Resource	SF	elec	10	0.89	1.20	0.90	1.13
Duct Testing and Sealing	HVAC	Resource	SF	elec	7	0.89	1.20	0.90	1.13
Duct Testing and Sealing	HVAC	Resource	MH	gas	10	1.04	1.61	1.02	1.56
Duct Testing and Sealing	HVAC	Resource	MH	gas	7	0.89	1.16	0.88	1.13
Duct Testing and Sealing	HVAC	Resource	SF	gas	10	1.01	1.53	1.02	1.56
Duct Testing and Sealing	HVAC	Resource	SF	gas	7	0.86	1.10	0.88	1.12
Furnace Repair/Replacement	HVAC	Non-resource	MF	gas	10	0.00	NR	0.00	NR
Furnace Repair/Replacement	HVAC	Non-resource	MF	gas	7	0.00	NR	0.00	NR
Furnace Repair/Replacement	HVAC	Non-resource	MH	gas	10	0.00	NR	0.00	NR
Furnace Repair/Replacement	HVAC	Non-resource	MH	gas	7	0.00	NR	0.00	NR
Furnace Repair/Replacement	HVAC	Non-resource	SF	gas	10	0.00	NR	0.00	NR
Furnace Repair/Replacement	HVAC	Non-resource	SF	gas	7	0.00	NR	0.00	NR
New - Prescriptive Duct Sealing	HVAC	Resource	SF	elec	10	0.63	0.65	0.66	0.65
New - Prescriptive Duct Sealing	HVAC	Resource	SF	elec	7	0.63	0.65	0.66	0.65

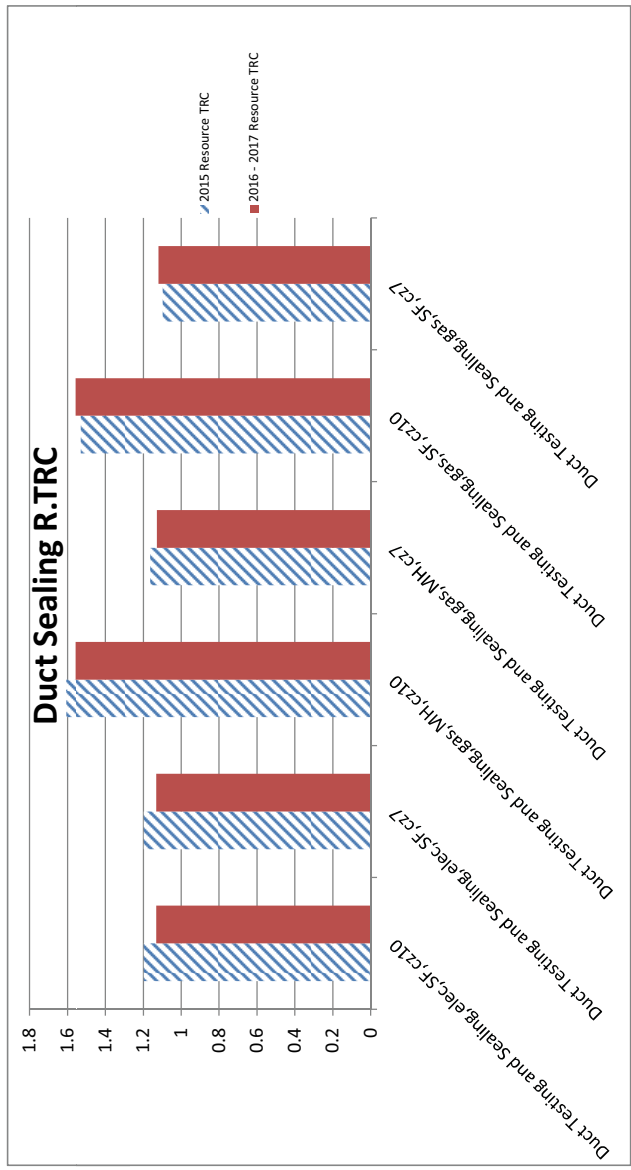
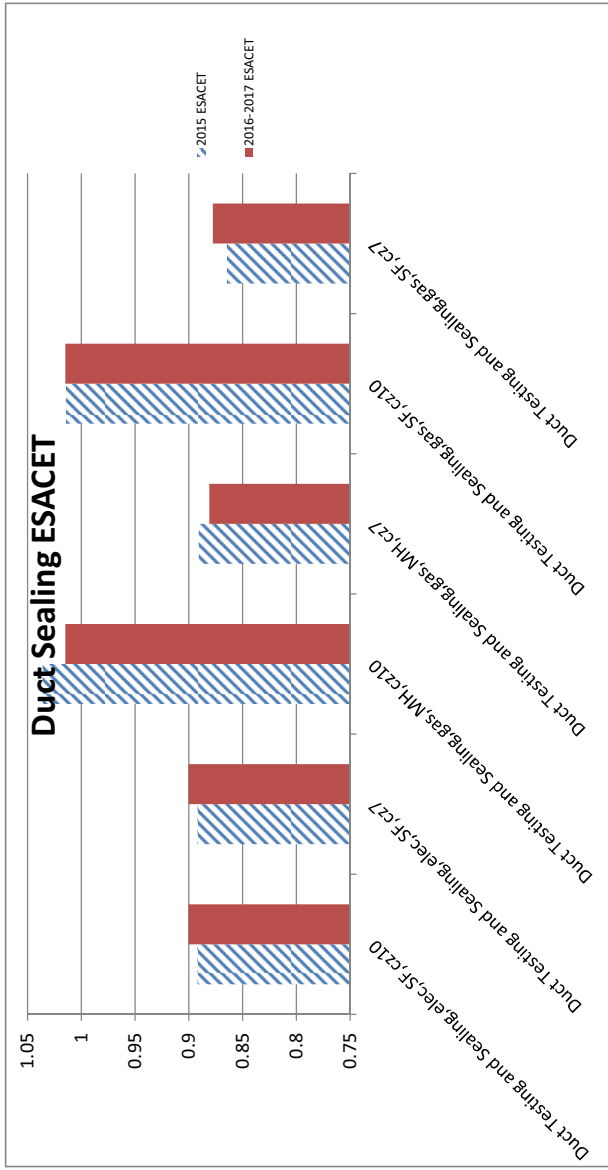
Measure	Measure Group	Type of Measure	Type of Home	Electric or Gas	Climate Zone	Ratio of Benefits over Costs			
						2015 ESACET	2015 Resource TRC	2016-2017 ESACET	2016 - 2017 Resource TRC
New - Prescriptive Duct Sealing	HVAC	Resource	MH	gas	10	0.63	0.66	0.66	0.65
New - Prescriptive Duct Sealing	HVAC	Resource	MH	gas	7	0.63	0.66	0.66	0.65
New - Prescriptive Duct Sealing	HVAC	Resource	SF	gas	10	0.63	0.66	0.66	0.65
New - Prescriptive Duct Sealing	HVAC	Resource	SF	gas	7	0.63	0.66	0.66	0.65
Room A/C Replacement	HVAC	Non-resource	MF	elec	10	0.06	NR	0.06	NR
Room A/C Replacement	HVAC	Non-resource	MH	elec	10	0.06	NR	0.06	NR
Room A/C Replacement	HVAC	Non-resource	SF	elec	10	0.06	NR	0.06	NR
Central A/C Tune-up	Maintenance	Resource	MF	gas	10	1.18	4.45	1.04	4.42
Furnace Clean and Tune	Maintenance	Resource	MF	gas	10	1.57	0.62	1.58	0.64
Furnace Clean and Tune	Maintenance	Resource	MF	gas	7	1.57	0.62	1.58	0.64
Furnace Clean and Tune	Maintenance	Resource	MH	gas	10	1.57	0.62	1.58	0.64
Furnace Clean and Tune	Maintenance	Resource	MH	gas	15	1.57	0.62	1.58	0.64
Furnace Clean and Tune	Maintenance	Resource	MH	gas	7	1.35	0.50	1.58	0.64
Furnace Clean and Tune	Maintenance	Resource	SF	gas	10	1.84	0.80	1.83	0.82
Furnace Clean and Tune	Maintenance	Resource	SF	gas	7	1.08	0.37	1.11	0.38

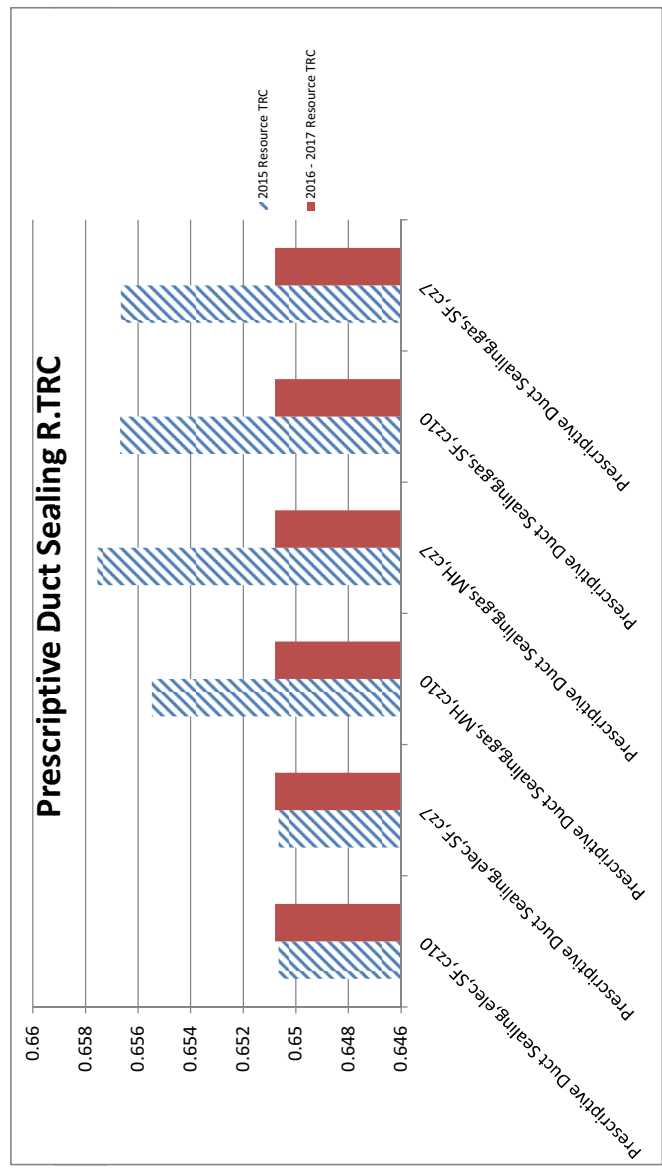
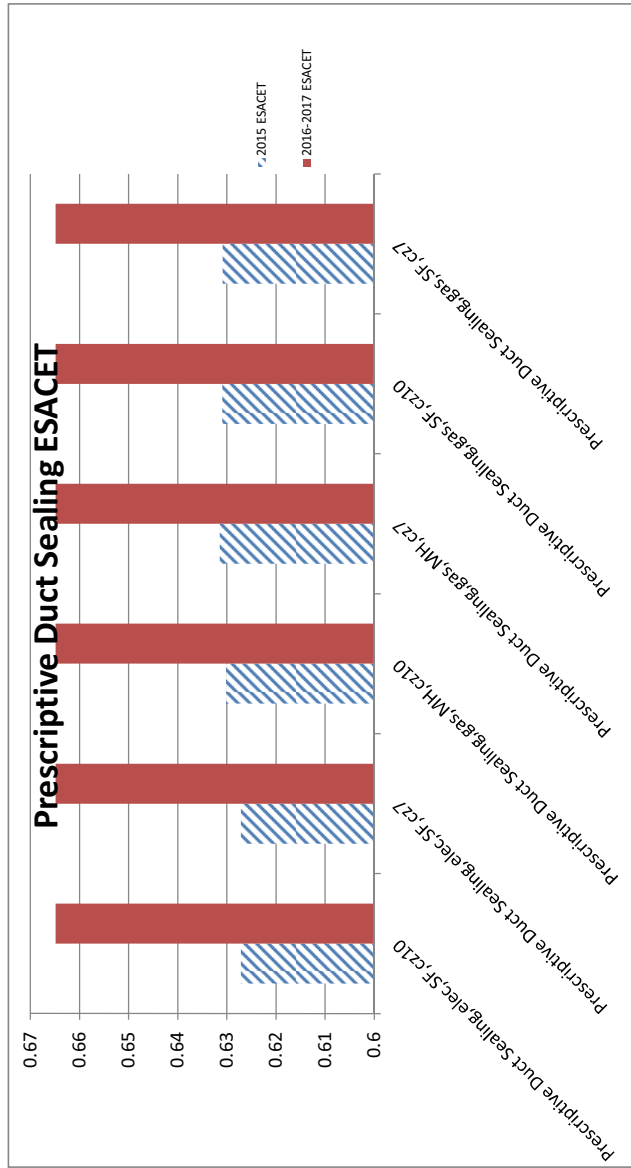
NR = Non-resource measure; this measure was not included in the Resource TRC test.

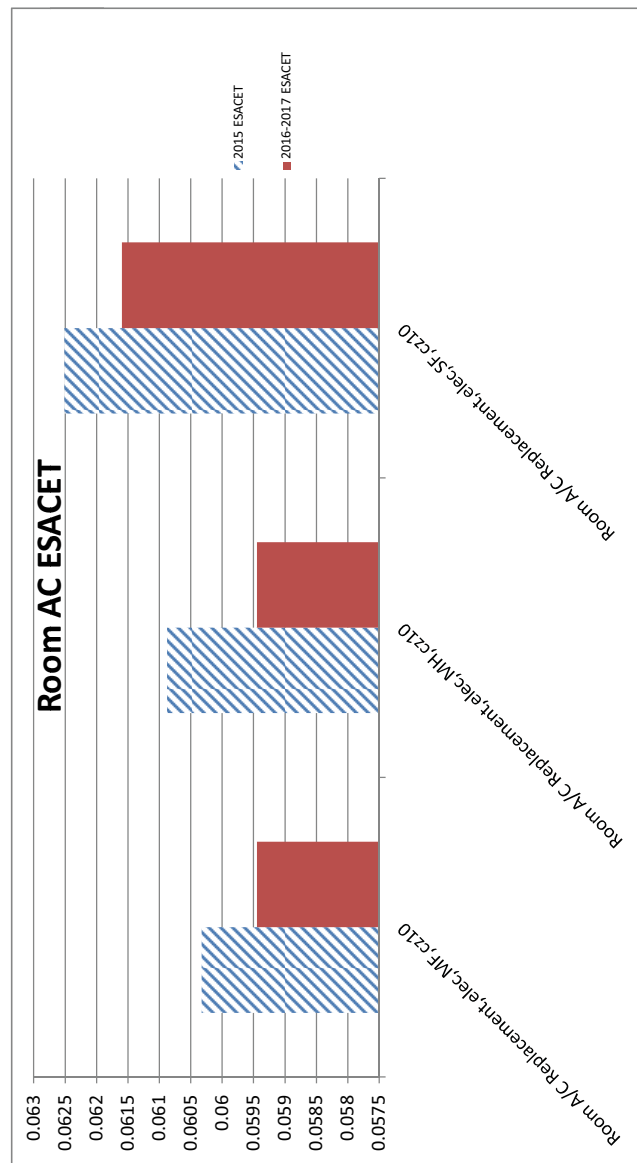


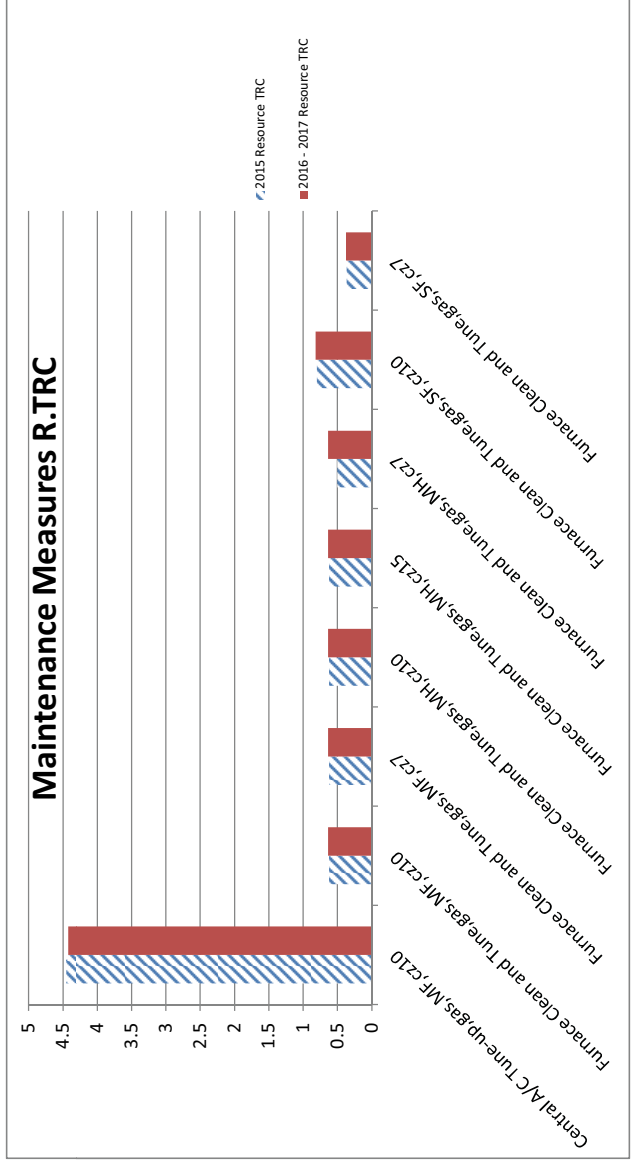
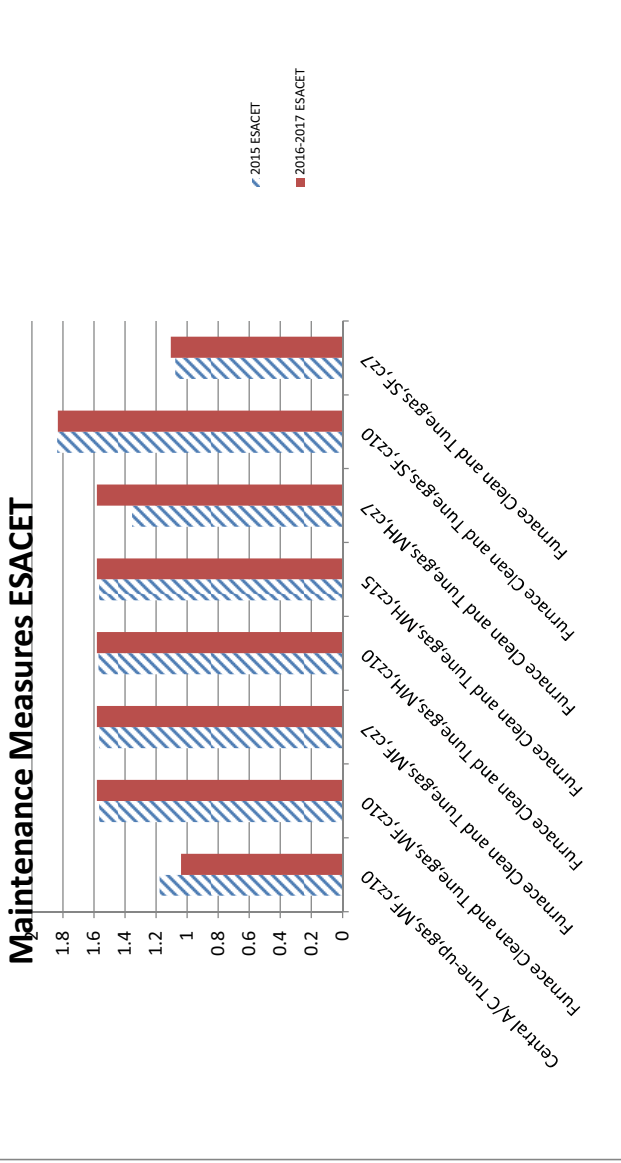
Attachment A-6 Charts for Weather Sensitive Measures











Energy Savings Assistance Program Cost-Effectiveness - Non Weather Sensitive Measures
 San Diego Gas & Electric Company

Measure	Measure Group	Type of Measure	Type of Home	Electric or Gas	Ratio of Benefits over Costs			
					2015 ESACET	2015 Resource TRC	2016-2017 ESACET	2016 - 2017 Resource TRC
High Efficiency Clothes Washer	Appliance	Resource	elec	MF	0.65	0.19	0.71	0.19
High Efficiency Clothes Washer	Appliance	Resource	elec	SF	0.64	0.19	0.71	0.19
High Efficiency Clothes Washer	Appliance	Resource	gas	MF	0.42	0.20	0.45	0.20
High Efficiency Clothes Washer	Appliance	Resource	gas	MH	0.42	0.20	0.45	0.20
High Efficiency Clothes Washer	Appliance	Resource	gas	SF	0.42	0.20	0.45	0.20
Microwaves	Appliance	Resource	elec	MF	0.67	0.67	0.63	0.67
Microwaves	Appliance	Resource	elec	MH	0.75	0.79	0.63	0.67
Microwaves	Appliance	Resource	elec	SF	0.67	0.67	0.63	0.67
Microwaves	Appliance	Resource	gas	MF	1.02	1.97	0.91	2.01
Microwaves	Appliance	Resource	gas	MH	1.02	1.96	0.91	2.01
Microwaves	Appliance	Resource	gas	SF	1.02	1.97	0.91	2.01
Refrigerators	Appliance	Resource	elec	MF	0.84	0.94	0.78	0.95
Refrigerators	Appliance	Resource	elec	MH	0.84	0.94	0.78	0.95
Refrigerators	Appliance	Resource	elec	SF	0.83	0.92	0.77	0.93
Faucet Aerator	DHW	Resource	elec	MF	0.42	0.11	0.48	0.11
Faucet Aerator	DHW	Resource	elec	MF	0.42	0.11	0.48	0.11
Faucet Aerator	DHW	Resource	elec	MH	0.24	0.06	0.28	0.06
Faucet Aerator	DHW	Resource	elec	MH	0.25	0.06	0.28	0.06
Faucet Aerator	DHW	Resource	elec	SF	0.64	0.17	0.72	0.17
Faucet Aerator	DHW	Resource	elec	SF	0.64	0.17	0.72	0.17
Faucet Aerator	DHW	Resource	elec	SF	0.72	0.19	0.72	0.17
Faucet Aerator	DHW	Resource	elec	SF	0.72	0.19	0.72	0.17
Faucet Aerator	DHW	Resource	gas	MF	0.24	0.11	0.26	0.11
Faucet Aerator	DHW	Resource	gas	MF	0.24	0.11	0.26	0.11
Faucet Aerator	DHW	Resource	gas	MH	0.31	0.14	0.34	0.15
Faucet Aerator	DHW	Resource	gas	MH	0.31	0.14	0.34	0.15
Faucet Aerator	DHW	Resource	gas	SF	0.59	0.30	0.62	0.31
Faucet Aerator	DHW	Resource	gas	SF	0.59	0.30	0.62	0.31
Low Flow Showerhead	DHW	Resource	elec	MF	0.09	0.02	0.10	0.02
Low Flow Showerhead	DHW	Resource	elec	MF	0.09	0.02	0.10	0.02
Low Flow Showerhead	DHW	Resource	elec	MH	0.09	0.02	0.10	0.02

Measure	Measure Group	Type of Measure	Type of Home	Electric or Gas	Ratio of Benefits over Costs			
					2015 ESACET	2015 Resource TRC	2016-2017 ESACET	2016 - 2017 Resource TRC
Low Flow Showerhead	DHW	Resource	elec	MH	0.08	0.02	0.10	0.02
Low Flow Showerhead	DHW	Resource	elec	SF	0.23	0.06	0.27	0.06
Low Flow Showerhead	DHW	Resource	elec	SF	0.23	0.06	0.27	0.06
Low Flow Showerhead	DHW	Resource	elec	SF	0.24	0.06	0.27	0.06
Low Flow Showerhead	DHW	Resource	elec	SF	0.22	0.05	0.27	0.06
Low Flow Showerhead	DHW	Resource	gas	MF	0.08	0.04	0.09	0.04
Low Flow Showerhead	DHW	Resource	gas	MF	0.08	0.04	0.09	0.04
Low Flow Showerhead	DHW	Resource	gas	MH	0.11	0.05	0.12	0.05
Low Flow Showerhead	DHW	Resource	gas	MH	0.11	0.05	0.12	0.05
Low Flow Showerhead	DHW	Resource	gas	SF	0.22	0.10	0.24	0.10
Low Flow Showerhead	DHW	Resource	gas	SF	0.22	0.10	0.24	0.10
New - Combined Showerhead/TSV	DHW	Resource	elec	MF	2.20	0.86	2.34	0.88
New - Combined Showerhead/TSV	DHW	Resource	elec	MF	2.21	0.88	2.34	0.88
New - Combined Showerhead/TSV	DHW	Resource	elec	MH	2.09	0.80	2.34	0.88
New - Combined Showerhead/TSV	DHW	Resource	elec	SF	2.81	1.38	2.93	1.39
New - Combined Showerhead/TSV	DHW	Resource	elec	SF	2.81	1.38	2.93	1.39
New - Combined Showerhead/TSV	DHW	Resource	elec	SF	2.83	1.41	2.93	1.39
New - Combined Showerhead/TSV	DHW	Resource	elec	SF	2.90	1.48	2.93	1.39
New - Combined Showerhead/TSV	DHW	Resource	gas	MF	1.87	2.10	1.84	2.16
New - Combined Showerhead/TSV	DHW	Resource	gas	MF	1.88	2.11	1.84	2.16
New - Combined Showerhead/TSV	DHW	Resource	gas	MH	1.81	1.91	1.78	1.95
New - Combined Showerhead/TSV	DHW	Resource	gas	MH	1.81	1.91	1.78	1.95
New - Combined Showerhead/TSV	DHW	Resource	gas	SF	1.81	1.91	1.78	1.95
New - Combined Showerhead/TSV	DHW	Resource	gas	SF	1.81	1.91	1.78	1.95
New - Heat Pump Water Heater	DHW	Resource	gas	MF	3.42	2.30	3.08	1.61
New - Heat Pump Water Heater	DHW	Resource	gas	MH	3.57	2.63	3.08	1.61
New - Heat Pump Water Heater	DHW	Resource	gas	MH	2.61	1.22	3.08	1.61
New - Heat Pump Water Heater	DHW	Resource	gas	SF	2.98	1.61	3.08	1.61
New - Heat Pump Water Heater	DHW	Resource	gas	SF	2.90	1.51	3.08	1.61
New - Tub Diverter	DHW	Resource	elec	MF	1.51	0.49	1.64	0.49
New - Tub Diverter	DHW	Resource	elec	MF	1.51	0.48	1.64	0.49
New - Tub Diverter	DHW	Resource	elec	MH	1.79	0.62	1.64	0.49
New - Tub Diverter	DHW	Resource	elec	MH	1.34	0.41	1.64	0.49
New - Tub Diverter	DHW	Resource	elec	SF	2.06	0.78	2.20	0.78

Measure	Measure Group	Type of Measure	Type of Home	Electric or Gas	Ratio of Benefits over Costs			
					2015 ESACET	2015 Resource TRC	2016-2017 ESACET	2016 - 2017 Resource TRC
New - Tub Diverter	DHW	Resource	elec	SF	2.05	0.77	2.20	0.78
New - Tub Diverter	DHW	Resource	elec	SF	2.13	0.82	2.20	0.78
New - Tub Diverter	DHW	Resource	elec	SF	1.86	0.66	2.20	0.78
New - Tub Diverter	DHW	Resource	gas	MF	0.46	0.22	0.49	0.23
New - Tub Diverter	DHW	Resource	gas	MF	0.46	0.22	0.49	0.23
New - Tub Diverter	DHW	Resource	gas	MH	0.46	0.22	0.49	0.23
New - Tub Diverter	DHW	Resource	gas	MH	0.46	0.22	0.49	0.23
New - Tub Diverter	DHW	Resource	gas	SF	0.46	0.22	0.49	0.23
New - Tub Diverter	DHW	Resource	gas	SF	0.46	0.22	0.49	0.23
Thermostatic Shower Valve	DHW	Resource	elec	MF	1.76	0.61	1.90	0.61
Thermostatic Shower Valve	DHW	Resource	elec	MF	1.77	0.61	1.90	0.61
Thermostatic Shower Valve	DHW	Resource	elec	MH	1.75	0.60	1.90	0.61
Thermostatic Shower Valve	DHW	Resource	elec	SF	2.33	0.96	2.47	0.97
Thermostatic Shower Valve	DHW	Resource	elec	SF	2.33	0.96	2.47	0.97
Thermostatic Shower Valve	DHW	Resource	elec	SF	2.35	0.97	2.47	0.97
Thermostatic Shower Valve	DHW	Resource	elec	SF	2.29	0.93	2.47	0.97
Thermostatic Shower Valve	DHW	Resource	gas	MF	0.31	0.14	0.33	0.14
Thermostatic Shower Valve	DHW	Resource	gas	MF	0.31	0.14	0.33	0.14
Thermostatic Shower Valve	DHW	Resource	gas	MH	0.39	0.19	0.42	0.19
Thermostatic Shower Valve	DHW	Resource	gas	MH	0.39	0.19	0.42	0.19
Thermostatic Shower Valve	DHW	Resource	gas	SF	0.73	0.40	0.77	0.41
Thermostatic Shower Valve	DHW	Resource	gas	SF	0.73	0.40	0.77	0.41
Water Heater Blanket	DHW	Resource	elec	MF	0.04	0.02	0.04	0.02
Water Heater Blanket	DHW	Resource	elec	MF	0.04	0.02	0.04	0.02
Water Heater Blanket	DHW	Resource	elec	SF	0.06	0.04	0.06	0.04
Water Heater Blanket	DHW	Resource	elec	SF	0.06	0.04	0.06	0.04
Water Heater Blanket	DHW	Resource	gas	MF	0.03	0.02	0.03	0.02
Water Heater Blanket	DHW	Resource	gas	MF	0.03	0.02	0.03	0.02
Water Heater Blanket	DHW	Resource	gas	MH	0.02	0.02	0.03	0.02
Water Heater Blanket	DHW	Resource	gas	MH	0.03	0.02	0.03	0.02
Water Heater Blanket	DHW	Resource	gas	SF	0.05	0.04	0.05	0.04
Water Heater Blanket	DHW	Resource	gas	SF	0.05	0.04	0.05	0.04
Water Heater Pipe Insulation	DHW	Resource	elec	MF	0.03	0.02	0.03	0.02
Water Heater Pipe Insulation	DHW	Resource	elec	MF	0.03	0.02	0.03	0.02

Measure	Measure Group	Type of Measure	Type of Home	Electric or Gas	Ratio of Benefits over Costs			
					2015 ESACET	2015 Resource TRC	2016-2017 ESACET	2016 - 2017 Resource TRC
Water Heater Pipe Insulation	DHW	Resource	elec	SF	0.03	0.02	0.03	0.02
Water Heater Pipe Insulation	DHW	Resource	elec	SF	0.03	0.02	0.03	0.02
Water Heater Pipe Insulation	DHW	Resource	elec	SF	0.03	0.02	0.03	0.02
Water Heater Pipe Insulation	DHW	Resource	elec	SF	0.03	0.02	0.03	0.02
Water Heater Pipe Insulation	DHW	Resource	gas	MF	0.01	0.01	0.01	0.01
Water Heater Pipe Insulation	DHW	Resource	gas	MF	0.01	0.01	0.01	0.01
Water Heater Pipe Insulation	DHW	Resource	gas	MH	0.01	0.01	0.01	0.01
Water Heater Pipe Insulation	DHW	Resource	gas	MH	0.01	0.01	0.01	0.01
Water Heater Pipe Insulation	DHW	Resource	gas	MH	0.01	0.01	0.01	0.01
Water Heater Pipe Insulation	DHW	Resource	gas	SF	0.03	0.02	0.03	0.02
Water Heater Pipe Insulation	DHW	Resource	gas	SF	0.03	0.02	0.03	0.02
Water Heater Pipe Insulation	DHW	Resource	gas	SF	0.03	0.02	0.03	0.02
Water Heater Repair/Replacement	DHW	Non-resource	gas	MF	0.32	NR	0.34	NR
Water Heater Repair/Replacement	DHW	Non-resource	gas	MF	0.31	NR	0.34	NR
Water Heater Repair/Replacement	DHW	Non-resource	gas	MH	0.32	NR	0.34	NR
Water Heater Repair/Replacement	DHW	Non-resource	gas	MH	0.32	NR	0.34	NR
Water Heater Repair/Replacement	DHW	Non-resource	gas	SF	0.32	NR	0.34	NR
Water Heater Repair/Replacement	DHW	Non-resource	gas	SF	0.32	NR	0.34	NR
Water Heater Repair/Replacement	DHW	Non-resource	gas	SF	0.32	NR	0.34	NR
FAU Standing Pilot Light Conversion	HVAC	Resource	gas	MH	1.16	0.55	1.13	0.57
FAU Standing Pilot Light Conversion	HVAC	Resource	gas	MH	1.17	0.56	1.13	0.57
FAU Standing Pilot Light Conversion	HVAC	Resource	gas	SF	1.16	0.55	1.13	0.57
FAU Standing Pilot Light Conversion	HVAC	Resource	gas	SF	1.17	0.56	1.13	0.57
New - Energy Efficient Fan Control	HVAC	Resource	gas	MF	1.42	1.28	1.26	1.25
New - Energy Efficient Fan Control	HVAC	Resource	gas	MF	2.10	3.92	1.63	2.48
New - Energy Efficient Fan Control	HVAC	Resource	gas	MH	1.48	1.40	1.26	1.25
New - Energy Efficient Fan Control	HVAC	Resource	gas	MH	1.77	2.18	1.63	2.48
New - Energy Efficient Fan Control	HVAC	Resource	gas	SF	1.41	1.26	1.26	1.25
New - Energy Efficient Fan Control	HVAC	Resource	gas	SF	1.83	2.40	1.63	2.48
Compact Fluorescent Lights (CFLs)	Lighting	Resource	elec	MF	1.05	1.39	n/a	n/a
Compact Fluorescent Lights (CFLs)	Lighting	Resource	elec	MH	0.93	1.10	n/a	n/a
Compact Fluorescent Lights (CFLs)	Lighting	Resource	elec	SF	0.99	1.23	n/a	n/a
Exterior Hard wired CFL fixtures	Lighting	Resource	elec	SF	0.93	1.08	0.86	1.08
Interior Hard wired CFL fixtures	Lighting	Resource	elec	MF	0.71	0.69	0.67	0.69
Interior Hard wired CFL fixtures	Lighting	Resource	elec	MH	0.71	0.68	0.67	0.69
Interior Hard wired CFL fixtures	Lighting	Resource	elec	SF	0.71	0.69	0.67	0.69

Measure	Measure Group	Type of Measure	Type of Home	Electric or Gas	Ratio of Benefits over Costs			
					2015 ESACET	2015 Resource TRC	2016-2017 ESACET	2016 - 2017 Resource TRC
LED Night Lights	Lighting	Resource	elec	MF	0.22	0.15	0.22	0.16
LED Night Lights	Lighting	Resource	elec	MH	0.35	0.26	0.34	0.26
LED Night Lights	Lighting	Resource	elec	SF	0.22	0.15	0.21	0.15
New - LED Diffuse Bulb (60W Replace)	Lighting	Resource	elec	MF	0.97	1.27	0.89	1.28
New - LED Diffuse Bulb (60W Replace)	Lighting	Resource	elec	MH	0.97	1.27	0.89	1.28
New - LED Diffuse Bulb (60W Replace)	Lighting	Resource	elec	SF	0.97	1.27	0.89	1.28
New - LED Reflector Bulb (BR30 Recessed)	Lighting	Resource	elec	MF	1.02	1.39	0.93	1.40
New - LED Reflector Bulb (BR30 Recessed)	Lighting	Resource	elec	MH	1.02	1.39	0.93	1.40
New - LED Reflector Bulb (BR30 Recessed)	Lighting	Resource	elec	SF	1.02	1.39	0.93	1.40
Torchiere	Lighting	Resource	elec	MF	0.44	0.34	0.42	0.35
Torchiere	Lighting	Resource	elec	MH	0.45	0.36	0.43	0.36
Torchiere	Lighting	Resource	elec	SF	0.39	0.30	0.37	0.30
New - Smart Strip Tier II	Miscellaneous	Resource	elec	MF	n/a	n/a	0.51	0.44
New - Smart Strip Tier II	Miscellaneous	Resource	elec	MH	n/a	n/a	0.51	0.44
New - Smart Strip Tier II	Miscellaneous	Resource	elec	SF	n/a	n/a	0.51	0.44
Smart Strip	Miscellaneous	Resource	elec	MF	0.55	0.46	n/a	n/a
Smart Strip	Miscellaneous	Resource	elec	MH	0.55	0.46	n/a	n/a
Smart Strip	Miscellaneous	Resource	elec	SF	0.56	0.46	n/a	n/a

NR = Non-resource measure; this measure was not included in the Resource TRC test.
n/a = not applicable; this measure was not offered during this time.

**PY 2015 - 2017 Energy Savings Assistance Program Pilots and Studies
San Diego Gas & Electric Company**

Line No.	Statewide Study	Total Cost	Percent paid by Utility	Total Cost paid by Utility
1	Load Impact Evaluation	\$550,000	15%	\$82,500
2	Low Income Needs Assessment	\$500,000	15%	\$75,000
3	Energy Education Study Phase 2	\$350,000	15%	\$52,500
4	Equity Criteria & NEB Evaluation	\$150,000	15%	\$22,500
Total		\$1,550,000	15%	\$232,500

**PY 2015 - 2017 ESA Program Summary of Proposed Changes
San Diego Gas & Electric Company**

Proposed Program Change ¹	Notes
Inclusion of new measures into program	New measures are identified in ESAP Attachment A-2.
Modify existing self certification policy for the U.S. Department of Housing and Urban Development	Modify existing policy specifically for expedited enrollment for assisted MF housing. Discussion in Section C,3,m, Program Rules Modifications.
Use of methodology adopted for the eligible population	Discussion in Section II, B,3., Willingness to Participate.
Return to the 10 Year Go Back Rule	Return to 10 Year Go Back Rule once 2020 programmatic goal is reached.
Establishment of Training for program contractors	Discussion in II,3,a.
Total	

¹ This list is not inclusive of all proposed program plans. For the full list of program plans, reference the ESA Program Testimony.

ATTACHMENT B

**PY 2015 - 2017 CARE Proposed Program Budget
San Diego Gas & Electric Company**

CARE Budget Categories	2014 Authorized	2015 Planned	2016 Planned	2017 Planned
Outreach	\$ 2,300,352	\$ 2,300,352	\$ 3,186,046	\$ 3,250,245
Processing, Certification, Recertification	\$ 643,206	\$ 643,206	\$ 660,164	\$ 676,972
Post Enrollment Verification	\$ 403,200	\$ 437,912	\$ 369,581	\$ 341,012
IT Programming	\$ 1,230,082	\$ 1,098,580	\$ 1,375,387	\$ 1,485,444
Cool Centers	\$ 35,985	\$ 35,985	\$ 36,853	\$ 37,725
Pilots	\$ 108,000	\$ 110,160	\$ 112,363	\$ 114,610
Measurement and Evaluation	\$ 22,500	\$ 24,750	\$ 24,750	\$ 24,750
Regulatory Compliance	\$ 165,362	\$ 244,408	\$ 250,875	\$ 257,659
General Administration	\$ 518,406	\$ 533,900	\$ 573,107	\$ 587,342
CPUC Energy Division Staff	\$ 56,712	\$ 56,712	\$ 58,080	\$ 59,454
SUBTOTAL MANAGEMENT COSTS	\$ 5,483,805	\$ 5,485,965	\$ 6,647,204	\$ 6,835,212
Subsidies and Benefits	\$ 83,614,933	\$ 71,766,318	\$ 69,916,644	\$ 73,102,151
TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	\$ 89,098,738	\$ 77,252,283	\$ 76,563,848	\$ 79,937,363

**PY 2015 - 2017 CARE and ESAP Rate Impacts - Gas
San Diego Gas & Electric Company**

PY 2015	Average Rate Excluding CARE/ESA Surcharge	CARE Subsidy Portion of Rate	CARE Administration Portion of Rate	ESA Program Portion of Rate	ESA Program Administration Portion of Rate	Total CARE/ESA Surcharge	Average Rate Including CARE/ESA Surcharge
Customer Type							
Residential (non CARE)	\$0.01229	\$0.03071	\$0.00243	\$0.02972	\$0.00000	\$0.06285	\$0.07513
Residential (CARE)	\$0.01229	\$0.00000	\$0.00000	\$0.02972	\$0.00000	\$0.02972	\$0.04200
Commercial¹	\$0.04258	\$0.03071	\$0.00243	\$0.00972	\$0.00000	\$0.04285	\$0.08543
Industrial²	\$0.04100	\$0.03071	\$0.00243	\$0.00482	\$0.00000	\$0.03795	\$0.07895
Agricultural	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Lighting	N/A	N/A	N/A	N/A	N/A	N/A	N/A
System	\$0.02260	\$0.03071	\$0.00243	\$0.02146	\$0.00000	\$0.05460	\$0.07720

PY 2016	Average Rate Excluding CARE/ESA Surcharge	CARE Subsidy Portion of Rate	CARE Administration Portion of Rate	ESA Program Portion of Rate	ESA Program Administration Portion of Rate	Total CARE/ESA Surcharge	Average Rate Including CARE/ESA Surcharge
Customer Type							
Residential (non CARE)	\$0.01229	\$0.03165	\$0.00294	\$0.04056	\$0.00000	\$0.07515	\$0.08744
Residential (CARE)	\$0.01229	\$0.00000	\$0.00000	\$0.04056	\$0.00000	\$0.04056	\$0.05285
Commercial¹	\$0.04258	\$0.03165	\$0.00294	\$0.01326	\$0.00000	\$0.04785	\$0.09043
Industrial²	\$0.04100	\$0.03165	\$0.00294	\$0.00658	\$0.00000	\$0.04117	\$0.08216
Agricultural	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Lighting	N/A	N/A	N/A	N/A	N/A	N/A	N/A
System	\$0.02260	\$0.03165	\$0.00294	\$0.02930	\$0.00000	\$0.06388	\$0.08649

PY 2017	Average Rate Excluding CARE/ESA Surcharge	CARE Subsidy Portion of Rate	CARE Administration Portion of Rate	ESA Program Portion of Rate	ESA Program Administration Portion of Rate	Total CARE/ESA Surcharge	Average Rate Including CARE/ESA Surcharge
Customer Type							
Residential (non CARE)	\$0.01229	\$0.03201	\$0.00302	\$0.04186	\$0.00000	\$0.07690	\$0.08918
Residential (CARE)	\$0.01229	\$0.00000	\$0.00000	\$0.04186	\$0.00000	\$0.04186	\$0.05415
Commercial¹	\$0.04258	\$0.03201	\$0.00302	\$0.01369	\$0.00000	\$0.04872	\$0.09130
Industrial²	\$0.04100	\$0.03201	\$0.00302	\$0.00679	\$0.00000	\$0.04182	\$0.08282
Agricultural	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Lighting	N/A	N/A	N/A	N/A	N/A	N/A	N/A
System	\$0.02260	\$0.03201	\$0.00302	\$0.03024	\$0.00000	\$0.06527	\$0.08787

¹ Core C/I

² NonCore C/I

Natural Gas CARE subsidy for this table is illustrative. Actual CARE subsidy will be updated in an Advice Letter filing per OP 22 in D.04-08-010.

**PY 2015 - 2017 CARE and ESAP Rate Impacts - Electric
San Diego Gas & Electric Company**

PY 2015	Average Rate Excluding CARE/ESAP Surcharge	CARE Subsidy Portion of Rate¹	CARE Administration Portion of Rate	ESAP Program Portion of Rate	ESAP Administration Portion of Rate	Total CARE/ESAP Surcharge	Average Rate Including CARE/ESAP Surcharge
Customer Type							
Residential	19.749	0.625	0.023	0.060	0.000	0.709	20.458
Commercial	23.146	0.625	0.023	0.060	0.000	0.709	23.855
Industrial	18.449	0.625	0.023	0.060	0.000	0.709	19.158
Agricultural	18.883	0.625	0.023	0.060	N/A	0.709	19.592
Lighting	17.413	0.000	0.000	0.000	N/A	0.000	17.413
System	19.393	0.625	0.023	0.060	0.000	0.709	20.102

PY 2016	Average Rate Excluding CARE/ESAP Surcharge	CARE Subsidy Portion of Rate¹	CARE Administration Portion of Rate	ESAP Program Portion of Rate	ESAP Administration Portion of Rate	Total CARE/ESAP Surcharge	Average Rate Including CARE/ESAP Surcharge
Customer Type							
Residential	19.833	0.622	0.028	0.060	0.000	0.710	20.543
Commercial	23.133	0.622	0.028	0.060	0.000	0.710	23.843
Industrial	18.480	0.622	0.028	0.060	0.000	0.710	19.190
Agricultural	18.896	0.622	0.028	0.060	N/A	0.710	19.606
Lighting	17.454	0.000	0.000	0.000	N/A	0.000	17.454
System	19.440	0.622	0.028	0.060	0.000	0.710	20.150

PY 2017	Average Rate Excluding CARE/ESAP Surcharge	CARE Subsidy Portion of Rate¹	CARE Administration Portion of Rate	ESAP Program Portion of Rate	ESAP Administration Portion of Rate	Total CARE/ESAP Surcharge	Average Rate Including CARE/ESAP Surcharge
Customer Type							
Residential	19.833	0.639	0.029	0.060	0.000	0.728	20.561
Commercial	23.133	0.639	0.029	0.060	0.000	0.728	23.861
Industrial	18.480	0.639	0.029	0.060	0.000	0.728	19.208
Agricultural	18.896	0.639	0.029	0.060	N/A	0.728	19.624
Lighting	17.454	0.000	0.000	0.000	N/A	0.000	17.454
System	19.440	0.639	0.029	0.060	0.000	0.728	20.168

¹ Includes the CARE Rate Subsidy component of the CARE Surcharge which was implemented in electric rates effective 5/1/14.

**PY 2013-2014 CARE Outreach and Penetration Information
San Diego Gas & Electric Company**

CARE PY 2013					
Outreach Method	Total Cost	Estimated # of Customers Reached	Estimated # of Customers Enrolled	Percent of Net Enrollments for PY 2013	
CARE Door-to-Door	\$ 211,404	20,000	8,642	15.0%	
Mass Marketing ¹	\$ 686,293	1,300,000	20,404	35.5%	
SDG&E Branch Offices	\$ -	8,537	7,033	12.2%	
Telephone Campaigns	\$ 22,664.00	140,000	1,837	3.2%	
Third-Party Contracts	\$ 374,687		9,510	16.5%	
Customer Contact Center	\$ -	25,000	5,990	10.4%	
Data Sharing	\$ -	N/A	2,119	4%	
Bill Insert	\$ 11,404	1,100,000	1,043	2%	
Direct Mail	\$ 34,300	30,000	381	1%	
Other	\$ -	N/A	561	1%	
Total Enrollments	\$ 1,340,752.00		57,520	100%	

CARE PY 2014 Septmeber YTD					
Outreach Method	Total Cost	Estimated # of Customers Reached	Estimated # of Customers Enrolled	Percent of Net Enrollments for PY 2014	
CARE Door-to-Door	\$ 141,420		5,633	13%	
Mass Marketing ¹	\$ 639,680	1,300,000	17,038	39%	
SDG&E Branch Offices	\$ -		4,417	10%	
Third-Party Contracts	\$ 382,695		5,674	13%	
Customer Contact Center	\$ -	18,000	4,050	9%	
Data Sharing	\$ -		2,175	5%	
Bill Insert	\$ 5,700	450,000	243	1%	
Direct Mail	\$ 16,252	75,000	3	0%	
Other ²	\$ -		4,186	10%	
	\$ 1,185,747.00		43,419	100%	

¹ Includes cost for Mass Media efforts including: Television, phone, print, and, email blast. Enrollments numbers included IVR and Internet enrollments generated from these efforts.

**PY 2015 - 2017 CARE Estimated Participation
San Diego Gas & Electric Company**

	Total Enrolled Through June 2014	Total Enrolled Through June 2014 RD Report	PY 2014 Estimated Eligible	Estimated Net PY 2014 Enrollments	Estimated Year End PY 2014 Participation	Estimated PY 2014 Goal Rate	Estimated PY 2015 Goal Rate	Estimated PY 2016 Net Enrollments	Estimated Year End PY 2016 Participation	Estimated PY 2016 Goal Rate	Estimated PY 2017 Net Enrollments	Estimated Year End PY 2017 Participation	Estimated PY 2017 Goal Rate
(Source)	(1)	7/21/14 RD Report	(2)	(3)	(Col. B+E)	(Col. F/D)	(Col. I/D)	(2)	(Col. I+K)	(Col. L/D)	(2)	(Col. L+N)	(Col. O/D)
	300,554	289,986	371,546	-10,000	290,554	78%	80%	17,000	315,554	85%	20,000	335,554	90%

(a) Estimated PY2015, PY2016 and PY2017 Goal Rate will fluctuate based on updated CARE Eligibility information to be filed December 2015, December 2016 and December 2017.

(1) CARE Annual Reports, dated 5/1/14

(2) Each utility's estimate based on eligibility rates filed.

(3) Most recent estimates of net enrollments.

**Low Income Customer Usage Levels
San Diego Gas & Electric Company**

	PY 2013		PY 2014 (Projected)		PY 2015 (Projected)		PY 2016 (Projected)		PY 2017 (Projected)	
	Number of CARE Customers (1)	Number of Customers Treated by ESAP	Number of CARE Customers (1)	Number of Customers Treated by ESAP	Number of CARE Customers (1)	Number of Customers Treated by ESAP	Number of CARE Customers (1)	Number of Customers Treated by ESAP	Number of CARE Customers (1)	Number of Customers Treated by ESAP
Electric										
Total	368,033	15,931	335,541	20,316	342,742	20,316	350,246	20,316	358,058	20,316
Tier 1*	202,174	7,609	184,178	8,013	189,703	8,013	195,394	8,013	201,256	8,013
Tier 2*	45,863	3,145	40,041	4,495	40,842	4,495	41,659	4,495	43,754	4,495
Tier 3*	71,033	3,195	63,575	4,944	64,847	4,944	66,143	4,944	69,470	4,944
Tier 4*	48,993	1,982	47,747	2,864	46,315	2,864	44,925	2,864	43,577	2,864
Tier 5*	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Gas										
Total	238,394	11,053	218,224	19,167	219,602	19,167	222,197	19,167	224,420	19,167
Below Baseline*	181,495	7,655	177,387	14,216	179,161	14,216	180,952	14,216	182,762	14,216
Above Baseline*	56,899	3,398	40,837	4,951	40,441	4,951	41,245	4,951	41,658	4,951

Excludes submeter and expanded CARE

The usage tier is reported as the tier the customer was on, the maximum number of months, in the reported year.

Tier 1: up to 100% of baseline allowance

Tier 2: 101% to 130% of baseline allowance

Tier 3: 131% to 200% of baseline allowance

Tier 4: >200% of baseline allowance

Gas below baseline: up to 100% of baseline allowance

Gas above baseline: >100% of baseline allowance

**PY 2015 - 2017 CARE Pilots and Studies
San Diego Gas & Electric Company**

Line No.	Statewide Study	Total Cost	Percent paid by Utility	Total Cost paid by Utility
1	CHANGES	\$ 2,247,558	15%	\$ 337,134
Total		\$ 2,247,558	\$ 0	\$ 337,134

**PY 2015 - 2017 CARE Program Summary of Proposed Changes
San Diego Gas & Electric Company**

Proposed Program Change ¹	Notes
Addition to Customer Contact Center phone enrollment	SDG&E Energy Service Specialist will offer live CARE phone enrollment for customers
Enlisting ESA Contractor CARE Door-to-Door Enrollment	ESA Contractors will offer CARE enrollment to customers who decide they are not interested in the ESA Program.
California Lifeline	SDG&E will begin partnering with agencies working with California Lifeline and Covered California.
Rate Education Reports	SDG&E will enhance targeted direct mail efforts to include rate education report that encourage customers to enroll in CARE.
High Usage Alerts	SDG&E will provide alerts to High Usage customers in jeopardy of losing the CARE discount if their usage is not kept below 600% of baseline.
Total	

¹ This list is not inclusive of all proposed program plans. For the full list of program plans, reference the CARE Testimony, Section B-1.

ATTACHMENT C

Impact Evaluation of the Energy Savings Assistance Program
Joint Utility Study (PG&E, SCE, SDG&E, SoCalGas)

The utilities propose conducting an Impact Evaluation of the Energy Savings Assistance Program for program year 2015. The primary objective of the study will be to estimate the first year electric and gas savings for the program in aggregate and by various strata including, but not limited to, utility area, housing type and climate zone (for weather sensitive measures). The study will also provide estimates of demand savings and consumption patterns.

1. Overview of Budget

The proposed budget for the study is \$550,000. SDG&E’s portion is \$82,500 which represents 15% of the total costs.

Study	Allocation			
Load Impact Evaluation Study	PGE	30%	\$	165,000
	SCE	30%	\$	165,000
	SCG	25%	\$	137,500
	SDG&E	15%	\$	82,500
	Total	100%	\$	550,000

2. Brief Study Description

The study approach will include a billing analysis for customers who received measures from the ESA program during 2015. The analysis typically includes a fixed effects regression model and comparison of results with previous years’ studies. In addition, an engineering analysis may be done for any measures which cannot be estimated with the regression models. The deliverable for the study will be a written report describing the analysis and results.

3. Study Rationale and Expected Outcome

An impact evaluation of the ESA Program is periodically done to provide savings estimates that are used in cost effectiveness analyses and for program reporting. The savings estimates resulting from this study will be used in the 2018 to 2020 program cycle.

4. Study Implementation

The study will be competitively bid and awarded to an independent consulting firm. The utilities will work with the consulting firm to provide the necessary data and allow for stakeholder review and input during the course of the study. Public workshops or webinars are planned to allow stakeholders and interested parties to comment on the process. The first workshop or webinar will introduce the consulting firm and present

and discuss the research plan, and a subsequent one will discuss the draft results of the study. In addition, stakeholders and interested parties will be allowed to post comments on the CPUC's dataweb site.

The primary tasks to be completed during the study include the following:

- Development of a detailed research plan
- Data cleaning and verification
- Development of regression models
- Analysis and discussion of regression results
- Workshops or webinars for interested parties
- Final documentation and report

5. Study Budget & Timing Table

The study is expected to commence during the last quarter of 2016 and be completed in 2017. The following table provides rough estimates of time and cost based on initial planning assumptions. These may change once proposals are solicited.

Activity	Estimated Cost	Approximate Timing
Pre-study planning and contracting		4 months
Early project initiation	\$55,000	2 months
Data collection and analysis	\$275,000	6 months
Reporting and deliverables	\$165,000	2 months
Ongoing project management	\$55,000	ongoing
Total	\$550,000	14 months

Note that if timing permits and it proves to be a viable approach, the Energy Education Phase II study may overlap with applicable tasks of the Impact Assessment Study.

Low Income Needs Assessment Study
Joint Utility Study (PG&E, SCE, SDG&E, SoCalGas)

Pursuant to Ordering Paragraph 56 in D. 14-08-030, the utilities propose conducting a Low-Income Needs Assessment Study for program year 2015. The primary objectives of the study as defined in D.14-08-030 are 1) to produce estimates of remaining energy potential, 2) to provide updated assessments of energy insecurity and energy burden, 3) to assess the level of burden in providing income documentation for CARE, and 4) to identify the most beneficial program measures.

1. Overview of Budget

The proposed budget for the study is \$500,000. SDG&E’s portion is \$75,000 which represents 15% allocation of the total costs.

Study	Allocation			
Low Income Needs Assessment Study	PGE	30%	\$ 150,000	
	SCE	30%	\$ 150,000	
	SCG	25%	\$ 125,000	
	SDG&E	15%	\$ 75,000	
	Total	100%	\$ 500,000	

2. Brief Study Description

A Low Income Needs Assessment study was completed in 2007 and again in 2013. These efforts gathered data from customers during 2003 and 2013 respectively. Both of these efforts included a broad and fairly extensive scope of work with many research objectives. Given extensive knowledge gathered from these and numerous other studies over the past decade, some of which is repetitive and consistent, at this time it is not necessary to replicate the copious efforts reported in the 2007 and 2013 reports.

It is expected that the results from a new needs assessment study will complement what has been learned via prior studies while also addressing some research related gaps that have been identified over the course of executing these studies. By limiting the research objectives and targeting specific topics and/or markets, the anticipated outcomes may include data on areas that have not been well understood or well researched, as well as more comprehensive data on some topics that may have been addressed in a more cursory way in prior needs assessment studies. The study may, for example, consider an examination of the needs, and extent to which the needs are being met, of some sub-markets that previous evaluations offered little data on (e.g., non-English/Non Spanish speaking low income customers).

The study will likely include primary data collection with customers on relevant topics. This may be obtained via internet or phone surveys, in home interviews, focus groups, or other methods to be determined during the solicitation and proposal review process. In addition, other secondary data will be used which may include public data sources such as RASS and CLASS.

3. Study Rationale and Expected Outcome

The overall purpose of the Needs Assessment study is to learn more about the nature and needs of California’s low income customers in service of identifying ways to better serve them and potentially improve the CARE and ESA Programs. This study meets the AB 327 requirement for a triennial needs assessment study.

4. Study Implementation

The study will be competitively bid and awarded to an independent consulting firm. The utilities will work with Energy Division and the consulting firm to provide the necessary data and allow for stakeholder review and input during the course of the study. Public workshops or webinars are planned to allow stakeholders and interested parties to comment on the process. The first workshop or webinar will introduce the consulting firm and present and discuss the research plan, and a subsequent one will discuss the draft results of the study. In addition, stakeholders and interested parties will be allowed to post comments on the CPUC’s dataweb site.

The primary tasks to be completed during the study include the following:

- Development of a detailed research plan
- Data collection
- Analysis and development of recommendations
- Workshops or webinars for interested parties
- Final documentation and report

5. Study Budget & Timing Table

The study is expected to commence in 2015 and be completed by the end of 2016. The following table provides estimates of time and cost based on initial planning assumptions. These may change once proposals are solicited.

Activity	Estimated Cost	Approximate Timing
Pre-study planning and contracting		6 months
Early project initiation	\$50,000	2 months
Data collection and analysis	\$250,000	9 months
Reporting and deliverables	\$150,000	4 months
Ongoing project management	\$50,000	Ongoing
Total	\$500,000	21 months

Energy Education Study Phase 2
Joint Utility Study (PG&E, SCE, SDG&E, SoCalGas)

As directed in D.14-08-030, the utilities will conduct an Energy Education Phase 2 Study. This study will assess the savings potential of the energy education component of the ESA program. The Study will conduct an analysis to determine if any measureable savings can be identified and attributed to the current education offered through the program.

1. Study Budget Table

The proposed budget for the study is \$350,000. SDG&E’s portion is \$52,500 which represents 15% allocation of the total costs.

Study	Allocation			
Energy Education Study Phase 2	PGE	30%	\$	105,000
	SCE	30%	\$	105,000
	SCG	25%	\$	87,500
	SDG&E	15%	\$	52,500
	Total	100%	\$	350,000

2. Brief Study Description & Background

The Energy Education Phase 2 Study will assess potential savings associated with the education component of the ESA Program. Because all customers who receive any measures also receive education, it has not been possible to disaggregate savings of this component via billing analyses used in the impact evaluations. In addition, because the information/education is provided as part of the contractors’ overall process of providing measures to customers, any potential savings related to education are not easily disentangled from the overall savings customers receive via participation in the program. The Energy Education Phase 1 Study reported that contractors often customize their educational approach and discussion with customers according to the particular household needs and the unique issues of that home (e.g., demographic characteristics such as number of occupants in home, presence of children, if elderly are in the home, if customer has a crying baby there at the time of an assessment). Thus, identifying any common savings attributable to this effort is a difficult task. In general, the household energy savings resulting from marketing and educational programs can be challenging to detect and measure relative to energy savings resulting from widget based installation programs. Furthermore, the more holistic and integrated approach to providing education/information that the ESA Program uses, which includes site-specific in person information offered during both the assessment and installation visits, makes the measurement of savings even more challenging for this program.

Although it is expected that other possible approaches may be researched and considered in response to the RFP for this study, one possible approach may compare the energy savings of customers who receive the current educational component through the ESA Program during 2016 with those of a group of past program

participants. This approach is based on the assumption that, even though the past participants received an educational component as part of their participation, any behavior changes related to that education have since ended, thus allowing them to serve as a reasonable nonparticipant control group. The average household savings for the two groups would then be compared and any differences assessed. A potential limitation with this approach is that differences between the two groups may be underreported if the past participants adopted sustained behavioral changes as a result of the information they received from the program.

3. Study Rationale and Expected Outcome

The Study will conduct an analysis to determine if any measureable savings can be identified and attributed to the education component, and then report the difference in average household savings relative to a previous year’s cohort. Savings attributed to energy education and behavior programs in the industry have typically been low and difficult to measure without very large samples. It would be cost prohibitive to conduct an experimental design for this Study, which would require large samples for treatment and control groups. Furthermore, since all program participants receive the educational component, there is no variation within the sample of participants to allow for an estimation of savings related to education in the impact study billing analysis.

4. Study Implementation

The study will be competitively bid and awarded to an independent consulting firm. The utilities will work with the consulting firm to provide the necessary data and allow for stakeholder review and input during the course of the study. Public workshops or webinars are planned to allow stakeholders and interested parties to comment on the process. The first workshop or webinar will introduce the consulting firm and present and discuss the research plan, and a subsequent one will discuss the draft results of the study. In addition, stakeholders and interested parties will be allowed to post comments on the CPUC’s dataweb site.

The primary tasks to be completed during the study include the following:

- Development of a detailed research plan
- Data cleaning and verification
- Development of regression models
- Analysis and discussion of results
- Workshops or webinars for interested parties
- Final documentation and report

5. Study Budget & Timing Table

The study is expected to commence during the last quarter of 2016 and be completed in 2017. The following table provides estimates of time and cost based on initial planning assumptions. These may change once proposals are solicited.

Activity	Estimated Cost	Approximate Timing
Pre-study planning and contracting		4 months
Early project initiation	\$35,000	2 months

Data collection and analysis	\$175,000	6 months
Reporting and deliverables	\$105,000	2 months
Ongoing project management	\$35,000	ongoing
Total	\$350,000	14 months

**Equity Criteria and Non-Energy Benefits Evaluation
Joint Utility Study (PG&E, SCE, SDG&E, SoCalGas)**

This study is designed to address certain recommendations listed in the Addendum to the Working Group Cost-Effectiveness White Paper that was submitted in 2013 and referenced in D.14-08-030. In particular, this study will provide information for the recommended Equity Evaluation and Non-Energy Benefits (NEBs) study that were recommended in the White Paper Addendum.

1. Study Budget Table

The proposed budget for the study is \$150,000. SDG&E’s portion is \$22,500 which represents 15% allocation of the total costs.

Study	Allocation			
	Equity Criteria & NEB Evaluation	PGE	30%	\$ 45,000
	SCE	30%	\$ 45,000	
	SCG	25%	\$ 37,500	
	SDG&E	15%	\$ 22,500	
	Total	100%	\$150,000	

2. Brief Study Description.

This study will address certain recommendations in the Cost-Effectiveness White Paper Addendum. First, an equity evaluation will be done of all program measures offered in the 2015 to 2017 cycle. Secondly, the approach for estimating NEBs will be revised. Each of these is described in more detail below.

Equity Evaluation:

The objective of the Equity Evaluation is to qualitatively assess the level of health, comfort and safety attributes resulting from each of the ESA measures. As stated in the paper, “The Equity Evaluation results are...intended to provide additional information about ESA program measures which, in conjunction with other data, could be used to better understand program impacts, make a determination about measure inclusion in the ESA program, and/or improve measure or program design.”

The Cost-Effectiveness White Paper Addendum listed four criteria by which each measure or measure group should be assessed:

- Elimination of a combustion-related safety threat;
- Elimination of a fire safety threat or improvement of home security (crime prevention) and building integrity;
- Reduction or elimination of extreme temperatures and temperature variations inside the home or improvement of customer ability to manage in-home temperatures; and
- Improvement of air quality, ventilation and/or air flow (e.g. reduction of drafts and leakage).

The White Paper's recommendation was to rate each program measure or measure group on a scale of one to five according to the extent the measure achieves each of the four criteria. The paper further described how the ratings would be assigned. For example, a rating of "5" would indicate that the measure almost always results in that particular improvement.

Non-Energy Benefits:

The objective of this part of the study is to revise the NEBs calculations used in the cost-effectiveness analysis. The Working Group recommended that, beginning with the 2015 to 2017 program cycle, the NEBs estimation be revised to include the direct calculation of three specific NEBs (water savings, reduced arrearages and reduced customer calls), and the estimation of remaining NEBs via an "adder" or factor that could be multiplied by an appropriate base. Development of the adder was particularly problematic for the Working Group as neither an appropriate base, nor a rationale for a particular percentage, were identified. In addition to updated calculations, the study will provide a new spreadsheet tool and a summary of recent research in the literature to support the revised calculations.

3. Study Rationale and Expected Outcome

The qualitative equity evaluation will provide information on how ESA measures contribute to the quality of life of its participants. Furthermore, the resulting information will support the offering of certain measures that contribute significantly to health, comfort and safety but may not provide enough energy savings to be considered resource measures.

The NEBs evaluation will provide an updated spreadsheet for estimating the NEBs and bill savings utilized in the cost-effectiveness analysis for the ESA program. The current spreadsheet was created in 2001 and has only been minimally revised and updated since that date. Furthermore, the study will provide a summary of NEBs based on recent literature.

4. Study Implementation

The equity criteria assessment will involve the following tasks:

- Review the evaluation criteria and improve and/or expand as needed.
- Develop a questionnaire that will collect the needed information to assess each measure.
- Collect the appropriate assessment information from each IOU.
- Analyze data and rate measures.
- Provide a summary of ratings and a written qualitative description of each measure or measure group.

The NEBs portion of the study will include the following tasks:

- Research and summarize the research and findings related to estimating (specific) NEBs in the recent literature and additional analyses as appropriate
- Research and develop a set of adders to estimate values for NEBs based on the measures and services provided via the ESA program;
- Provide updated inputs and calculations for three specific NEBs: water savings, reduced arrearages, and reduced customer calls; and
- Create a spreadsheet that the IOUs can use going forward to estimate NEBs and bill savings.

5. Study Budget & Timing Table

The study is expected to commence in Q4 of 2015 and be completed in 2016. The following table provides estimates of time and cost based on initial planning assumptions. These may change once proposals are solicited.

Activity	Estimated Cost	Approximate Timing
Pre-study planning and contracting		3 months
Early project initiation	\$15,000	2 months
Data collection and analysis	\$75,000	3 months
Reporting and deliverables	\$45,000	3 months
Ongoing project management	\$15,000	Ongoing
Total	\$150,000	11 months