

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

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

**MONTHLY REPORT OF SAN DIEGO GAS & ELECTRIC COMPANY (U 902 M)
ON LOW-INCOME ASSISTANCE PROGRAMS FOR MARCH 2011**

KIM F. HASSAN

Attorney for
SAN DIEGO GAS & ELECTRIC COMPANY
555 West Fifth Street, GT-14E7
Los Angeles CA 90013
Telephone: (213) 244-3061
Facsimile: (213) 629-9620
E-Mail: KHassan@Semprautilities.com

April 21, 2011

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**MONTHLY REPORT OF SAN DIEGO GAS & ELECTRIC COMPANY (U 902 M)
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This is the third monthly report of program year (PY) 2011. The purpose of this report is to consolidate activity for the CARE and Energy Savings Assistance Programs and provide the Energy Division with all the necessary information to assist in analyzing the low-income programs.

This report presents year-to-date Energy Savings Assistance Program and CARE results and expenditures through March 2011 for San Diego Gas & Electric Company (SDG&E).

Respectfully Submitted,

/s/ Kim F. Hassan

KIM F. HASSAN
Attorney for
SAN DIEGO GAS & ELECTRIC COMPANY
555 West Fifth Street, GT-14E7
Los Angeles CA 90013
Telephone: (213) 244-3061
Facsimile: (213) 629-9620
E-Mail: KHassan@Semprautilities.com

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**San Diego Gas & Electric Company
Energy Savings Assistance Program
And
California Alternate Rates for Energy (CARE)
Program Monthly Report**

LOW-INCOME ASSISTANCE PROGRAM MONTHLY REPORT

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ENERGY SAVINGS ASSISTANCE PROGRAM MONTHLY REPORT

1. Energy Savings Assistance Program Executive Summary

1.1. Energy Savings Assistance Program Overview

1.1.1 Provide a summary of the Energy Savings Assistance Program elements as approved in Decision (D.) 08-11-031:

Energy Savings Assistance Program Summary for Month			
	Authorized / Planning Assumptions	Actual to Date	%
Budget	\$20,321,607	\$741,501	37%
Homes Treated	20,384	3,222	16%
kWh Saved	8,575,260	1,179,403	14%
kW Demand Reduced	1,965	112	5%
Therms Saved	452,749	70,482	16%
GHG Emissions Reduced	7,365	1,061	14%

SDG&E enrolled 1,937 customers in the Energy Savings Assistance Program during the month of March. This is 16% of the 2011 annual goal. Of those enrolled, 3,222 have been expensed and counted as homes treated. As a result of the enrollments and homes treated this year, SDG&E has saved 1,179,403 kWh, reduced 112 kW of demand, saved 70,482 therms and reduced 1,061 tons of green house gas (GHG) emissions.

Through marketing and outreach efforts, SDG&E generated a total of 3,842 leads for the Energy Savings Assistance Program in March, and is currently working to convert these leads into enrollments and homes treated.

1.2 Whole Neighborhood Approach Evaluation (WNA)

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

SDG&E continues to utilize the demographic information provided by Claritas using the PRIZM codes¹ assigned to customer records to target which allows SDG&E to target neighborhoods with higher concentrations of income qualified customers in support of the WNA.

Additionally, SDG&E will continue to coordinate its outreach efforts to city and community organizations by neighborhood. SDG&E is also expanding its outreach efforts with CARE Capitation agencies to reach deeper into neighborhoods by leveraging the relationships and individual outreach provided by our capitation partners.

1.3 Energy Savings Assistance Program Customer Outreach and Enrollment Update

1.3.1. Provide a summary of the Energy Savings Assistance Program outreach and enrollment strategies deployed this month.

Direct marketing – In March, direct marketing efforts included direct mail, automated outbound calling, email blasts and door-to-door canvassing.

Below is more detailed information on these activities.

- **Direct Mail**

During March, SDG&E mailed English and Spanish Energy Savings Assistance Program information to 8,659 households identified as having a high potential for Energy Savings Assistance Program eligibility. A total of 251 leads were generated from the March mailings, and a total of 76 households were enrolled based on previous and current direct mail efforts.

¹ Prizm codes are an area set of customer segmentation data widely used for marketing purposes in the United States. The data consist of demographic clusters that categorize every U.S. household into a segment. These segments were developed in part from the analysis of U.S. census data and categorize U.S. consumers into 14 distinct groups and 66 segments. The segments help marketers tailor content to consumers' needs and look at a variety of factors, including income, likes, dislikes, lifestyles and purchase behaviors.

Automated Outbound Calling

SDG&E contacted 29,091 households about the Energy Savings Assistance Program through bilingual automated outbound calls during March. From these calls, 900 leads were generated and 150 of the leads were converted into enrollments.

- **Door-to-Door Canvassing**

SDG&E's door-to-door canvassing contractor, Richard Heath & Associates (RHA) continued to aggressively canvass the SDG&E service territory in March, calling on 9,609 low-income homes. RHA generated 763 leads and converted 751 into enrollments as a result. Door-to-door canvassing continues to be the most productive direct marketing technique for Energy Savings Assistance Program, turning out the most leads per contact and the best quality leads as demonstrated by the high conversion of leads to enrollments.

1.3.2 Customer Assistance Marketing, Education and Outreach for the CARE and Energy Savings Assistance Programs.

In March, SDG&E continued to jointly promote CARE and Energy Savings Assistance Program with advertising, public relations and community outreach.

- **Mass Media**

SDG&E launched an Online marketing campaign on March 7th. CARE and Energy Savings Assistance Programs are utilizing rich media ads and paid search ads on Google, Yahoo/Bing and Facebook. The paid search ads and key

word search will direct customers to a microsite found here:

<http://www.sdge.com/customerassistance/index.html>²

Display ads will also be located on the following websites: SignonSanDiego (Union Tribune), NBC San Diego.com, CBS8, 10news.com, Careerbuilder, Yahoo!, Valueclick NETWORK. Online marketing is scheduled to run through December 2011.

Television ads for both CARE and Energy Savings Assistance Program continued airing on English and Hispanic television stations. Traffic id's also continued on English and Hispanic radio stations. CARE and Energy Savings Assistance Programs, Television and radio advertising is scheduled to run through the end of April.

- **CARE & Energy Savings Assistance Program Community Outreach**

In March, community outreach for CARE and Energy Savings Assistance Programs included participation in community events, leveraging efforts with Capitation Contractors, 2-1-1 San Diego and the branch offices.

- **Community Events**

SDG&E and its partners participate in and sponsor a variety of local events in order to educate low-income customers about and to help them enroll in its assistance programs. SDG&E participated in nine community events in March, which resulted in 23 CARE applications and 12 Energy Savings Assistance Program interest forms.

² SDG&E's website is designed to comply with W3C accessibility guidelines.

March 3 – Community Leader’s Spotlight in Orange County

SDG&E hosted the Orange County Community Leaders’ Spotlight which brought together approximately 300 community leaders and businesses. SDG&E representatives were on site to help raise awareness of the programs SDG&E offers to low-income and special needs customers. The information was well-received by those in attendance.

March 4 - South Bay Pentecostal Church Food Distribution

South Bay Pentecostal Church is a member of the San Diego Food Bank's "Food To Nonprofits Program" and as one of the partners, Church staff and volunteers obtain fresh fruits and vegetables along with canned non-perishables from the Food Bank's warehouse. The Church distributes bags and/or boxes of food, depending on family size, to individuals and families within the Chula Vista and Bonita areas. Attendance at these monthly events is approximately 200 people.

SDG&E’s customer assistance programs (such as CARE, Energy Savings Assistance Program, FERA, and Medical Baseline) were promoted by a non-profit community-based organization and capitation agency, Casa Familiar. Casa Familiar’s mission is to allow the dignity, power and worth within individuals and families to flourish by enhancing the quality of life through education, advocacy, service programming, housing and community economic development.

March 5 - Whale of a Block Party

The Whale of a Block Party is part of the 40th Anniversary of Dana Point’s Festival of Whales celebrating the migration of gray whales past Dana Point on their annual journey from Alaska to Mexico. The festival includes ocean-themed events, music, contests, vendors with food and crafts. The customer assistance group collaborated with the Smart Meter program and staffed a table to provide

information with customers on customer assistance programs and energy efficiency. The event was attended by about 10,000 people.

March 6 - Ocean Awareness Day (Dana Point)

SDG&E participated in the City of Dana Point's Ocean Awareness Day (OAD) an event within the Festival of Whales held on March 5, 2011. OAD is an interactive community outreach event bringing different and diverse City, County, State, public and non-profit groups together at the Dana Point Harbor, to reach out to the community to educate and make aware the many different issues our oceans and its environment face and what the city is doing to protect it. SDG&E's energy efficiency and customer assistance representatives were there to promote its energy efficiency programs along with CARE, FERA, Energy Savings Assistance Programs and Medical Baseline. The event was free to the public.

March 11 - Amistad Rancho Hills Church Food Distribution

Amistad Rancho Hills Church is a member of San Diego Food Bank's "Food To Non-Profits Program" and as one of the partners, Church staff and volunteers obtain fresh fruits and vegetables along with canned non-perishables from the Food Bank's warehouse. The Church distributes bags and/or boxes of food, depending on family size, to individuals and families within the Paradise Hills, National City and Bonita zip codes the second Friday of each month.

Approximately 95% of the participants of the Amistad Rancho Hills Church food distribution are members of the Filipino Community. Approximately 300 people attended this event.

SDG&E's customer assistance programs were also promoted by partner community based organization Union of Pan Asian Communities (UPAC). UPAC is a nationally recognized non-profit organization, offering multicultural, multilingual, comprehensive health and human services to Asian, Pacific Islander and other ethnic communities. UPAC continues to strengthen low to moderate

English proficient individuals, immigrant, refugee and American born children and youth, adults, families and communities in 27 languages and dialects.

March 17 - Senior Wellness Fair and Mammogram Day Mountain Health and Community Services

Mountain Health & Community Services (MHCS) is a private, non-profit community health center organization providing comprehensive primary health care, health education, and social services to residents throughout San Diego County. The roots of MHCS lie in San Diego's Mountain Empire region, where the organization was initiated 35 years ago to bring health care services to this 950 square-mile region. The mission of MHCS is to improve the health and well being of the whole person.

This Senior Wellness Fair & Mammogram Day is an annual event sponsored by Mountain Health & Community Services (MHCS). It provides free mammograms, breast exams, breast health educations and health screenings. There are health educations booths and senior services including Medicare made available along with various other health sponsors who attend this event offering information and services. There are opportunity drawings for prizes and gift certificates, a free lunch and gift bag for the ladies. The customer assistance representatives collaborated with the Smart Meter program and had a table to share information with customers on customer assistance programs and energy efficiency.

March 19 – Community Health Fair – Familias Sanas y Activas

The purpose of the Health Fair was to share health related resources with community residents in Chula Vista. SDG&E representatives were there promoting the customer assistance programs and offering enrollment opportunity to the over 100 participants. SDG&E partnered with community based

organization San Ysidro Health Center-WIC. The Mission of San Ysidro Health Center is to improve the health and well being of our community's traditionally underserved and culturally diverse people in the South Bay.

March 22 and 25 Community Cares Program - Put Pride Aside Campaign

The Community Cares Program and The Put Pride Aside Campaign is a partnership between the San Diego Food Bank and over 30 health and human service organizations. The program operates as a “one-stop-shop” at distribution sites selected by the Food Bank. At these events, non-profit partner organizations host information tables advising people on their eligibility for programs including: low-cost healthcare, food assistance, assistance for the elderly, disabled and mentally ill, and foreclosure counseling. SDG&E partnered with community based organization Neighborhood Healthcare. Neighborhood Healthcare provides quality health care and promotes wellness to communities in need. Attendance at these events ranges from 150-300 people. For the month of March, SDG&E’s participation included events at the New Seasons Church and Samoa Independent Church.

March 26 – Annual Resource Fair Greater Apostolic Faith Temple

The Greater Apostolic Faith Temple held a resource fair for their senior community. Approximately 40 customers attended to receive information from various vendors. SDG&E representatives were on hand to promote the customer assistance programs and offer enrollment opportunity.

- **Capitation Contractors**

SDG&E leverages the resources of community-based organizations (CBOs) and agencies called Capitation Contractors to enroll customers in the CARE and Energy Savings Assistance Programs. These organizations leverage existing relationships with low-income clients to extend CARE and Energy Savings Assistance Program benefits as part of their total assistance offering. As an

incentive, SDG&E provides CARE and Energy Savings Assistance Program Capitation Contractors with a fee for each enrollment generated.

In an effort to maintain relationships with these organizations and keep the Energy Savings Assistance Program and the CARE program a priority, SDG&E visits most agency sites each week. In March SDG&E made 190 visits to 50 different agencies, which resulted in 283 CARE enrollments and 103 Energy Savings Assistance Program interest forms.

- **2-1-1 San Diego**

2-1-1 San Diego is a community disaster, health and human services resource center providing information and referrals to households that need assistance. SDG&E leverages the resources of 2-1-1 San Diego to promote CARE, Energy Savings Assistance Program and Medical Baseline.

Through referrals in March, 2-1-1 provided SDG&E with 267 CARE enrollments 242 Energy Savings Assistance Program interest forms and mailed 163 Medical Baseline program applications.

- **Other Integration and Leveraging Efforts**

Bill package::

CARE was promoted on the SDG&E bill in March with a message that read, *“You could receive up to 35% on your SDG&E bill. Call 1-877-646-5525 to enroll in the CARE program or visit sdge.com/care”*

My Account :

Beginning this month, the landing page of the online bill payment service, My Account, was revised to include SDG&E program information. Customers logging into My Account will now see information on the CARE program in one of the side panels. Also provided in the information panel is a link to the online CARE application.

Energy Notes:

Energy Notes is SDG&E's monthly newsletter inserted in all customer bills and available online for those who are paperless. An article on all of the customer assistance program offerings will be featured in customer bills during March and April. The article will provide information about SDG&E's CARE, FERA, Medical Baseline, Neighbor to Neighbor and Energy Savings Assistance Programs including an overview of each programs' benefits, the qualifications, and information on how to apply for the programs. The article will be featured in English and Spanish.

Integration with SDG&E Branch Payment Offices

Branch offices are visited weekly by SDG&E's outreach team to encourage customer service representatives to promote CARE and Energy Savings Assistance Programs to customers using the branch services. In March, 513 CARE applications and 181 Energy Savings Assistance Program interest forms were collected by branch offices representatives.

Internal Employee Event

The customer assistance outreach group conducted an internal employee event to raise awareness of the CARE/FERA, Energy Savings Assistance Programs and Medical Baseline. In partnership with the San Diego Hunger Coalition, the group held a one-hour presentation combining information on the current food insecurity in America and how employees can identify those in need to assist in enrolling in the programs. Approximately 170 employees attended this voluntary informational session; all receiving enrollment forms and fact sheets for the customer assistance programs. The information was well-received based on the 56 survey responses received, and personal feedback immediately after the session.

1.4 Leveraging Success Evaluation, Including CSD

1.4.1 Please provide a status of the leveraging effort with CSD. What new steps or programs have been implemented? What was the results in terms of new enrollments?

There was no new leveraging activity with CSD in the month of March.

1.5. Workforce Education & Training

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

There is no additional information to report this month regarding SDG&E efforts to improve and expand Energy Savings Assistance Program workforce education and training (WE&T).

2. CARE Executive Summary

2.1. CARE Program Summary

2.1.1. Please provide CARE program summary costs.

CARE Budget Categories	Authorized Budget	Actual Expenses to Date	% of Budget Spent
Outreach	\$1,734,261	\$386,339	22%
Proc., Certification and Verification	\$230,015	\$70,465	31%
Information Tech./Programming	\$452,687	\$29,988	7%
Pilots	N/A	N/A	N/A
Measurement and Evaluation	\$4,326	\$0	0%
Regulatory Compliance	\$196,401	\$47,449	24%
General Administration	\$423,927	\$58,811	14%
CPUC Energy Division Staff	\$102,900	\$15,935	15%
Cooling Centers	N/A	N/A	N/A
Total Expenses	\$3,144,517	\$608,987	19%
Subsidies and Benefits	\$49,919,937	\$17,896,756	36%
Total Program Costs and Discounts	\$53,064,454	\$18,505,743	35%

2.1.2 Please provide the CARE program penetration rate to date

CARE Penetration		
Participants Enrolled	Eligible Participants	Penetration rate
299,419	358,328	83.6%

2.2. Outreach

2.2.1 Discuss utility outreach activities and those undertaken by third parties on the utility's behalf. (For additional CARE Marketing, Education and Outreach efforts, see section 1.3.2.)

CARE Door-to-Door Canvassing

SDG&E's door-to-door canvassing contractor, Energy Save generated 1,283 CARE applications and converted 1,077 of these applications into enrollments.

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

SDG&E works with a number of agencies that offer low-income programs. For complete details on SDG&E's efforts to jointly promote CARE and Energy Savings Assistance Program through partnerships with other low-income agencies and through community events serving low-income customers, see Section 1.3.2 above.

In addition, other departments within SDG&E contribute to the success of the low-income programs. For example, SDG&E's call center provides customers with program information and referrals for the CARE and Energy Savings Assistance Programs. In March SDG&E enrolled 840 customers in CARE due to referrals from the Call Center.

2.3 CARE Recertification Complaints

There were no CARE Recertification complaints in March.

3. Appendix: Energy Savings Assistance Program Tables and CARE Tables

Energy Savings Assistance Program - Table 1- Program Expenses

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

Energy Savings Assistance Program - Table 3- Average Bill Savings per Treated Home

Energy Savings Assistance Program - Table 4- Homes Treated

Energy Savings Assistance Program - Table 5- Customer Summary

Energy Savings Assistance Program - Table 6- Expenditures for Pilots and Studies

Energy Savings Assistance Program - Table 7- Whole Neighborhood Approach

CARE- Table 1- CARE Overall Program Expenses

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

CARE- Table 3- CARE Verification

CARE- Table 4- Self Certification and Re-Certification

CARE- Table 5- Enrollment by County

CARE- Table 6- Recertification Results

CARE- Table 7- Capitation Contractors

CARE- Table 8- Participants as of Month End