

**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 DECEMBER 2011**

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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

TABLE OF CONTENTS

Title	Page
1. Energy Savings Assistance Program Executive Summary.....	1
1.1 Energy Savings Assistance Program Overview.....	1
1.2 Whole Neighborhood Approach Evaluation.....	3
1.3 Energy Savings Assistance Program Customer Outreach and Enrollment Update.....	3
1.4 Leveraging Success Evaluation, Including CSD.....	8
1.5 Workforce Education & Training.....	8
2. CARE Executive Summary.....	9
2.1 CARE Program Summary.....	9
2.2 Outreach.....	9
2.3 CARE Recertification Complaints.....	11
3. Appendix: Energy Savings Assistance Program Tables and CARE Tables.....	12

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	\$19,619,145	\$20,516,353	105%
Homes Treated	20,384	20,835	102%
kWh Saved	8,575,260	6,831,398	80%
kW Demand Reduced	1,965	612	31%
Therms Saved	452,749	386,826	80%
GHG Emissions Reduced	7,365	6,020	82%

SDG&E enrolled 1,331 customers in the Energy Savings Assistance Program during the month of December. This brings the year-to-date total for enrollments to 21,528. Of those enrolled, 20,835 have been expensed and counted as homes treated. This is 102% of the 2011 annual goal. As a result of the enrollments and homes treated this year, SDG&E has saved 6,831,398 kWh, reduced 612 kW of demand, saved 386,826 therms and reduced 6,020 tons of green house gas (GHG) emissions.

Through marketing and outreach efforts, SDG&E generated a total of 3,463 leads for the Energy Savings Assistance Program, and is currently working to convert these leads into enrollments and homes treated.

Fund Shifting Request

On October 24, 2011, SDG&E filed a Motion to Shift Energy Savings Assistance Program Funds¹, and requested approval to shift \$6.486 million from the 2010 unspent electric department to the gas department which included \$40,000 from the 2010 electric department and \$60,000 from the Programmable Communicating Thermostat (PCT) Pilot to its In- Home Display Pilot (IHD). In an Administrative Law Judge's Ruling (ALJ Ruling) , dated November 21, 2011, the Commission authorized the majority of SDG&E's fund shifting request, but denied its request to shift funds to the IHD Pilot as outlined above. The Ruling, however, permitted SDG&E to seek further review of its IHD Pilot fund shift request if SDG&E submits an itemized report to: 1) illustrate the IHD Pilot expenditures from inception to date; 2) provide an explanation of the amount and cause of the overages; and, 3) provide the funding need projections (IHD Report) to the Energy Division. SDG&E submitted its IHD Report on December 1, 2011.²

In a subsequent ALJ Ruling dated December 30, 2011 SDG&E's fund shifting request for the IHD pilot was approved. In Ordering Paragraph 3 of the December 30th Ruling SDG&E was directed to report in its 2011 monthly and annual reports to the Energy Division all transfers made pursuant to the fund shifting request authorized in the December 30th Ruling. As authorized in the December 30th Ruling, SDG&E has shifted \$35,000 of 2011 electric funds from the PCT Pilot and \$40,000 from the 2010 unspent electric department funds to the IHD Pilot.³

¹ Motion of San Diego Gas & Electric Company (U 902 M) To Shift Energy Savings Assistance Program Funds, Dated October 24, 2011.

² Additional Support for San Diego Gas & Electric Company's Request to Shift Funds to the In Home Display Pilot, dated December 1, 2011.

³ ALJ Ruling dated 12/30/2011 authorized fund shifts from unspent electric dept funds to gas dept in following categories: gas appliances, weatherization & outreach assessment. Final Fund shifting totals will be reported in Table 19 of the 2011 Annual Report.

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 demographic information provided by Claritas called PRIZM codes⁴ to target neighborhoods with higher concentrations of income qualified customers in support of the WNA. The PRIZM codes are assigned to the customer records and allow 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 and community based organizations (CBOs) 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 December, direct marketing efforts for the Energy Savings Assistance Program included direct mail, automated voice messaging (AVM) campaigns, door-to-door canvassing and email campaigns. Below is detailed information on these activities:

⁴ 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.

Direct Mail

A total of 41 leads were generated from December direct mail efforts and a total of 17 households were enrolled.

AVM Campaigns

SDG&E contacted approximately 30,079 households through automated outbound phone campaigns. From these calls, 573 leads were generated and 85 of the leads were converted into enrollments.

Door-to-Door Canvassing

SDG&E's canvassing contractor, Richard Heath & Associates (RHA), continued to canvass throughout SDG&E's service territory in December, calling on 8,835 homes. These efforts generated 622 leads and 596 enrollments for the program. Door-to-door canvassing continues to be the most successful direct marketing effort as it produces the most leads per contact and the best quality leads as demonstrated by the high conversion of leads to enrollments.

Email Campaigns

SDG&E emailed Energy Savings Assistance Program information to 98,762 households in December. The email campaigns explained the benefits of the program and how to enroll. These efforts combined for a total of 508 online leads and 18 online enrollments generated.

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

Advertising

SDG&E supported its direct marketing efforts for the CARE and Energy Savings Assistance Programs with a media campaign. Following is a more detailed description of the programs' advertising campaign:

Television

Both the CARE and Energy Savings Assistance Programs ran thirty and fifteen second commercials on English and Hispanic television channels. The commercials featured a family in a home setting, meeting SDG&E representatives and reviewing their SDG&E bill. The commercials talked about the benefits of each program and how to apply, they ran through December 11.

Community Outreach

In December, community outreach for the CARE and Energy Savings Assistance Programs consisted of participation in community events and leveraging efforts with capitation contractors, 2-1-1 San Diego, SDG&E branch offices and the multi-lingual, multi-cultural outreach project designed to reach diverse communities that might otherwise be unaware of general outreach efforts.

Multi-Cultural & Multi-Lingual Outreach

This outreach is being conducted by two contractors who have expertise in in-language and cultural services; The Harris Group (THG) and Catholic Charities (CC). Through THG efforts, a total of 162 CARE and 46 Energy Savings Assistance Program applications were collected. THG also supported SDG&E's Medical Baseline Program. CC had no activity in December. Following are THG's activities for the month of December:

Event Name/Location	Type of Event	Details of Event	Est # of Attendees
Total Deliverance Worship Center, Spring Valley	Faith Based	THG presented assistance programs information during services & was available afterwards to answer questions and assist with enrollments	400
Phillips Temple Christian Methodist Episcopal Church, San Diego	Faith Based	THG presented assistance programs and assisted with enrollments	250
Metro Workforce Development Center, San Diego	Orientation Session for Unemployed and Under-Employed	THG attended 12 orientation sessions to present assistance programs information and	240

		assist with enrollments	
Mount Hope/Helix Heights Community Meeting, San Diego	Community Meeting	THG presented assistance programs information to attendees and assisted with enrollments	unknown
South Metro Workforce Development Center, San Diego	Orientation Session for Unemployed and Under-Employed	THG attended four orientation sessions to present assistance programs information, assist with enrollments	100
Concord Medical Career College, San Diego	Orientation Session for new students	THG attended 10 orientation sessions to present assistance programs information, assist with enrollments	190

Community Events

SDG&E and its partners participated and sponsored a variety of local events in order to help educate and enroll low-income customers in its assistance programs (CARE, Energy Savings Assistance Program, Medical Baseline, etc.). In December, SDG&E participated in several community events, which resulted in 90 CARE and 37 Energy Savings Assistance Program applications collected. Following is a more detailed summary of these events:

Event Name/Location	Type of Event	Details of Event	Est # of Attendees
Feeding America San Diego (FASD) FASD's Mobile Pantry Program in northern and eastern rural towns: San Marcos, Descanso, Julian and Guatay	Food Distribution – four events in rural areas	SDG&E's Customer Assistance attended four events to offer customer assistance programs, and enrollment opportunities, to those waiting to receive food distribution from partner agency, Feeding America San Diego	50-150 per event
SD Community College New Horizons Program	Immigrant Student Resource Fair	SDG&E's customer assistance set up an informational table	400
American Red Cross, San Diego	Manager's Meeting	Presented assistance programs for enrollment strategy to be adopted and implemented in 2012	7
LED Holiday Lighting Exchange, Chula Vista and Escondido	Community Event in Hispanic Communities	SDG&E's customer assistance and energy efficiency groups partnered to promote the assistance programs to customers attending event to exchange old holiday lights for new energy efficient ones	200 per event

Resident Meeting – San Diego	SD Housing Commission – Low Income Housing Residents	Presentation of SDG&E customer assistance programs by SDG&E staff	120
Community Cares Program, Fallbrook	Food Distribution by SD Food Bank	SDG&E's Customer Assistance attends events to offer customer assistance programs, and enrollment opportunities, to those waiting to receive food distribution	200

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 CARE Program and Energy Savings Assistance Program as a priority, SDG&E visits most agency sites each week. In December, SDG&E made 125 visits to over 50 different agencies, which resulted in 802 CARE applications with 304 of them converting to enrollments and 13 Energy Savings Assistance Program applications.

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 the CARE Program, Energy Savings Assistance Program and Medical Baseline Program. Through referrals in December, 2-1-1 provided SDG&E with 148 CARE enrollments and 46 Energy Savings Assistance Program interest forms. The center also mailed out several Medical Baseline Program applications.

Integration and Leveraging Efforts

SDG&E Payment Offices

Branch offices are visited weekly by SDG&E's outreach team to encourage customer service representatives to promote the CARE and Energy Savings Assistance Programs to customers using the branch services. In December, 334 CARE applications and 282 Energy Savings Assistance Program interest forms were collected by branch offices representatives.

Energy Efficiency

SDG&E's Residential Lighting Program contains CARE Program information on all monthly postcards mailed to communities where a lighting exchange event will take place. In addition, all CARE customers accepted into the program receive an acceptance letter with information on the Home Energy Survey. The Customer Assistance fact sheet, an informational sheet on all SDG&E assistance programs, also contains information on the Energy Efficiency Rebate programs. The CARE application contains information on Energy Efficient Rebate programs and the Home Energy Survey.

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 activity with CSD during the month of December.

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 was no activity with WE&T in the month of December.

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	\$1,817,774	105%
Proc., Certification and Verification	\$230,015	\$253,704	110%
Information Tech./Programming	\$452,687	\$236,731	52%
Pilots	N/A	N/A	N/A
Measurement and Evaluation	\$4,326	\$13,350	309%
Regulatory Compliance	\$196,401	\$149,290	76%
General Administration	\$423,927	\$378,039	89%
CPUC Energy Division Staff	\$102,900	\$31,620	31%
Cooling Centers	N/A	N/A	N/A
Total Expenses	\$3,144,517	\$2,880,507	92%
Subsidies and Benefits	\$49,919,937	\$63,577,305	127%
Total Program Costs and Discounts	\$53,064,454	\$66,457,812	125%

2.1.2 Please provide the CARE program penetration rate to date

CARE Penetration		
Participants Enrolled	Eligible Participants	Penetration rate
308,596	362,551	85.1%

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)

Direct Marketing

In December, direct marketing efforts for the CARE Program included automated voice messaging (AVM), an email campaign and a bill insert. Below is detailed information on these activities:

AVM Campaigns

In December SDG&E contacted over 52,000 households through AVM campaigns and enrolled 2,073. In addition, approximately 7,000 customers were contacted to recertify and an estimated 1,000, chose to recertify using the AVM process.

Email Campaign

SDG&E emailed CARE program information to approximately 23,000 households in December. The email explained the benefits of the program and how to enroll. Customers were encouraged to visit the program application online or call the IVR number to enroll. A total of 1,479 online enrollments and 502 IVR enrollments occurred in December.

Bill Insert

In December, SDG&E included a CARE bill insert with all residential customer (those not already enrolled) bills. The English/Spanish bill insert encouraged customers to go online or call the IVR to enroll in the program.

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

2.3. CARE Recertification Complaints

There were no CARE recertification complaints in December

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