

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



FILED

05/01/18
04:59 PM

Application of Southern California Edison
Company (U 338E) for Approval of its Energy
Savings Assistance and California Alternate Rates
for Energy Programs and Budgets for Program
Years 2015-2017.

And Related Matters.

Application 14-11-007
(Filed November 18, 2014)

Application 14-11-009
Application 14-11-010
Application 14-11-011

**ANNUAL REPORT FOR FAMILY ELECTRIC RATE ASSISTANCE (FERA)
PROGRAM OF SAN DIEGO GAS & ELECTRIC COMPANY (U902M)
FOR PROGRAM YEAR 2017**

EDWARD L. HSU

Attorney for:

SAN DIEGO GAS & ELECTRIC COMPANY

555 W. 5th Street, GT14E7

Los Angeles, California 90013

Telephone: (213) 244-8197

Facsimile: (213) 629-9620

E-Mail: EHSU2@semprautilities.com

May 1, 2018

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

Application of Southern California Edison
Company (U 338E) for Approval of its Energy
Savings Assistance and California Alternate Rates
for Energy Programs and Budgets for Program
Years 2015-2017.

And Related Matters.

Application 14-11-007
(Filed November 18, 2014)

Application 14-11-009
Application 14-11-010
Application 14-11-011

**ANNUAL REPORT FOR FAMILY ELECTRIC RATE ASSISTANCE (FERA)
PROGRAM OF SAN DIEGO GAS & ELECTRIC COMPANY (U902M)
FOR PROGRAM YEAR 2017**

San Diego Gas & Electric Company (SDG&E) hereby submits its Annual Progress
Report for the Family Electric Rate Assistance (FERA) Program for the period January through
December 2017.

Respectfully Submitted
on behalf of San Diego Gas & Electric Company,

By: /s/ Edward L. Hsu
EDWARD L. HSU

Attorney for:
SOUTHERN CALIFORNIA GAS COMPANY
555 W. 5th Street, GT14E7
Los Angeles, CA 90013
Telephone: (213) 244-8197
Facsimile: (213) 629-9629
E-Mail: ehsu2@semprautilities.com

May 1, 2018



**FAMILY ELECTRIC RATE
ASSISTANCE (FERA)
PROGRAM ANNUAL REPORT**

Program Year 2017 Results

May 1, 2018

INTRODUCTION

The purpose of this annual report is to provide information on San Diego Gas & Electric Company's (SDG&E) Family Electric Rate Assistance (FERA) Program¹ and to report on the administrative and subsidy costs incurred by the Program. The California Public Utilities Commission (Commission or CPUC) in Decision (D.) 04-02-057, dated February 26, 2004, adopted the FERA Program, whereby qualifying lower-middle income large household participants were charged Tier 2 (101% - 130% of baseline) electric rates for their Tier 3 (131% - 200% of baseline) usage. The FERA Program is available to households of three or more persons with total household annual gross income levels between 200% (plus \$1) and 250% of the Federal Poverty Guidelines (FPG) in accordance with D.05-10-044.² These income levels are subject to revision pursuant to the Commission's communication of its updated annual income guidelines, which are issued no later than April 1 of each year and become effective June 1 of each year.

D.15-07-001, among other things, revised the FERA Program to provide qualified households with a 12% line item discount (instead of the prior benefit of billing Tier 3 usage at the Tier 2 rates). Pursuant to D.15-07-001, SDG&E filed Advice Letter 2783-E to implement the 2015 residential rate design reform (including the revision of the FERA line item discount) to become effective October 1, 2015. Pursuant to D.15-07-001, SDG&E also filed Advice Letter 2861-E-A to implement the glide path for the Tier consolidation which became effective July 1, 2016 for Tier 1 (up to 130% of Baseline) and Tier 2 (above 130% of Baseline) usage.

¹ FERA was originally referred to in Decision (D.) 04-02-057 as the Middle Income Large Household Program.

² See D.05-10-044, Ordering Paragraph 3.

SDG&E's FERA Report
January 1, – December 31, 2017

SDG&E's FERA Program implementation plan utilizes the existing procedures already developed and adopted by the Commission for the California Alternate Rates for Energy (CARE) Program. These existing protocols and procedures relate to outreach practices, enrollment, verification, and recertification activities. SDG&E uses a dual application form for the CARE and FERA Programs.

The following summarizes SDG&E's FERA Program activities for 2017.

**SAN DIEGO GAS & ELECTRIC COMPANY'S
FAMILY ELECTRIC RATE ASSISTANCE (FERA) PROGRAM**

January 1, 2017 through December 31, 2017

I. Participant Information

- A. Provide the total number of FERA customers by month, for the reporting period.**

TABLE 1		
2017	FERA Enrolled³	FERA Receiving Tier 3 Benefit⁴
January	7,390	N/A
February	7,538	N/A
March	7,637	N/A
April	7,726	N/A
May	7,743	N/A
June	7,810	N/A
July	7,878	N/A
August	7,978	N/A
September	8,004	N/A
October	8,006	N/A
November	7,988	N/A
December	7,962	N/A

³ D.15-07-001 approved the restructuring of the FERA discount to be an average effective discount of 12%. The FERA enrolled reflects those customers that received the discount. FERA enrolled excludes submeter accounts.

⁴ No longer applicable pursuant to the effective date of SDG&E Advice Letter 2861-E-A to implement the glide path for the Tier consolidation which became effective July 1, 2016.

- B. Provide the total number of FERA-eligible households, FERA-participating households, and FERA household penetration rates by quarter.**

TABLE 2			
FERA Penetration Rate			
2017 Quarter Ending	(Estimated) FERA Eligible Households⁵	FERA Participating Households	FERA Household Penetration Rate⁶
March 31	45,124	7,637	17%
June 30	45,124	7,810	17%
September 30	45,124	8,004	18%
December 31	45,124	7,962	18%

- C. Discuss how the estimates of current FERA-eligible households were developed.**

SDG&E used a customer information system count of residential customers within its territory as the basis for estimating the number of FERA-eligible households.

The estimated number of FERA-eligible households was developed by multiplying the number of residential customers by the poverty factor in the annual eligibility update for CARE/FERA, which is 3.71% for program year 2017.

Calculation as follows:

⁵ Compliance Filing of Pacific Gas & Electric (U 39 M) on Behalf of Itself, Southern California Gas Company (U 904-G), San Diego Gas & Electric Company (U 902 M) and Southern California Edison Company (U 338-E) Regarding the Annual Estimates of CARE Eligible Customers and Related Information, filed February 10, 2017.

⁶ The FERA household penetration rate is calculated by dividing FERA participating households by FERA-eligible households. Estimated number of FERA-eligible households is 3.71% of SDG&E's residential electric customers.

$$\text{Total Residential Customers} \times \text{Poverty Factor} = \text{FERA Estimated Eligible Households.}$$
$$1,215,115 * 0.037135 = 45,124$$

D. Provide the current FERA sub-metered tenant counts at year-end.

At year-end 2017, the number of sub-metered tenants participating in FERA totaled 167. Outreach and enrollment efforts for sub-metered facilities are leveraged with CARE outreach. The majority of sub-metered tenants submitting applications during 2017 qualified for and were enrolled in the CARE Program instead of the FERA Program.

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

In 2017, SDG&E encountered a problem with FERA customers who live in sub-metered mobile home parks. Tenants did not receive 1st and 2nd recertification notices for a few weeks. SDG&E corrected the issue and recertification notices began to be mailed properly again in March of 2018.

Another issue that occurred in 2017 was that customers who failed to complete the eligibility verification process were being dropped from the FERA program after 60 days instead of the correct 90-day timeline. To correct the issue, SDG&E is manually extending the verification timeline so customers are removed at the 90-day timeline. SDG&E anticipates the system automation will be corrected during 2018 so that the manual process is not needed.

II. Program Costs

A. Discount Cost

- 1. State the average monthly FERA discount received, in dollars per FERA customer.**

2017 Average Monthly Discount per Customer = \$13.61

The average monthly discount per customer was derived by calculating the year-end discount amount divided by the total number of customers year-to-date that received the discount.

- 2. State the cumulative annual discount for all FERA customers.**

2017 Cumulative Annual Discount = \$1,288,173⁷

B. Administrative Cost

- 1. Show the FERA Program's administrative cost by category.**

See Table 3 below.

Table 3	
FERA Program Administrative Costs by Category and Benefits	
Category	Cost
Outreach	\$52,506
Processing, Certification, and Verification	\$9,881
General Administration	\$26,445
TOTAL PROGRAM COSTS	\$88,832
CUSTOMER BENEFITS	\$1,288,173
TOTAL PROGRAM COSTS & CUSTOMER BENEFITS	\$1,377,005

⁷ Customer participation increased in 2017.

2. Explain what is included in each administrative cost category.

Outreach

The cost of outreach includes capitation fee payments and letter fulfillment. Capitation fees are fees paid to partner agencies that generate enrollments for the program by cross-selling the FERA Program with other assistance programs.

Processing, Certification, and Verification

The cost of processing, certification and verification consists of the labor costs to process, certify, and verify FERA applications.

General Administration

General administration costs include the costs associated with managing, reporting, and responding to customer calls related to the FERA Program.

Customer Benefits

Customer benefits includes the value of the FERA discounts provided to customers.

3. Explain how costs of joint CARE/FERA activities are charged to each program.

The costs of distinct CARE and FERA activities are charged separately to each Program by using separate source codes. To the extent possible, the costs of CARE/FERA activities are allocated in proportion to the work that was attributable to either CARE or FERA. Since most CARE and FERA Program activities are integrated, most costs are shared between the programs.

SDG&E's FERA Report
January 1 – December 31, 2017

C. Provide the year-end December 31 balances for the FERA balancing account for both the current and prior reporting periods.

As of December 31, 2017, there were \$88,832 in FERA administrative costs in the FERA sub-account of SDG&E's Baseline Balancing Account (BBA). The FERA sub-account records applicable costs associated with the FERA Program from its inception in 2004. The forecasted year-end 2016 balance under-collection of \$59,000 was amortized in 2017 rates and recorded to the FERA sub-account. As of December 31, 2016, there were \$71,544 in FERA administrative costs in the FERA sub-account of the BBA.

Additionally, D.15-07-001 authorized the restructuring of the FERA discount effective September 1, 2015. The change resulted in the establishment of the FERA Balancing Account (FERABA), pursuant to Advice Letter 2790-E. The FERABA only records the FERA discount, whereas the FERA sub-account of the BBA records the FERA Program administrative costs. As of December 31, 2017, there were \$1,288,173 in FERA discounts in the FERABA compared to \$967,388 in 2016.

III. Outreach

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

General Awareness

In 2017, SDG&E launched a new creative campaign that focused on letting qualified customers know they can save on their energy bill. The campaign intended to connect with customers by giving them one less thing to worry about.

The campaign ran in English, Spanish and Asian languages, and included streaming television (TV), newspaper, digital (including paid search), email, direct mail and bill inserts.

Print Campaigns

SDG&E continued to run print advertising in ethnic (African-American, Asian, and Hispanic) and rural publications. In 2017, SDG&E refreshed the print creative with a new campaign look. Samples of the new print creative are included in the Appendix 1.

Streaming TV

SDG&E launched a new TV commercial campaign through streaming TV media. The 15-second spots, promoting a bill discount, ran on streaming (on-demand) TV with placement on Hulu (NBC), CBS.com, Fox.com, ABC.com, CW.com and many others. Streaming TV is very flexible, allowing us to target our customer segments more deeply and optimize performance throughout the campaign.

SDG&E's FERA Report
January 1 – December 31, 2017

Additionally, through streaming TV, viewers cannot fast forward through the commercials. SDG&E ran three English and two Spanish versions of its TV commercial campaign throughout most of the year. The videos are available to view at:

English:

<https://www.youtube.com/watch?v=yuRDrAkYkQQ>

<https://www.youtube.com/watch?v=tgLmsGCxOSc>

<https://www.youtube.com/watch?v=VnHbkW0ee1k>

Spanish:

<https://www.youtube.com/watch?v=28L92DuNR7s>

<https://www.youtube.com/watch?v=Ri59IyOJiZ8>

Digital

SDG&E used an integrated online strategy of increasing awareness for the programs and driving online submissions using paid search, display ads and video ads.

Ethnic Marketing

SDG&E reached numerous ethnicities throughout the year with a variety of mass media tactics. Latino, African American, Chinese, Vietnamese, and Filipino audiences were targeted by print and digital campaigns.

Direct Marketing

SDG&E used direct mail to geographically target audience segments using Athens Research and SDG&E segmentation to identify areas with mid to high propensity for program participation. SDG&E conducted 18 direct mail campaigns in 2017 (12 for CARE program and 6 for Energy Savings Assistance (ESA) program). The direct mail postcard encouraged recipients to call SDG&E's toll-free enrollment number or to apply through SDG&E's online application.

Email Campaigns

In 2017, in addition to refreshing emails with the new creative campaign, SDG&E began to utilize a Nurture Campaign model. The Nurture Campaigns send a series of pre-written messages over a period of time in an automated fashion which move customers closer to conversion.

Contacts receive messages based on behavioral triggers including:

- Visits to a web-page
- Clicking of a link
- Receiving an email
- Taking no action at all

The Nurture Campaign model allows us to move customers to specific message tracks based on behavior:

- Opened an email

SDG&E's FERA Report
January 1 – December 31, 2017

- Did not open an email
- Clicked on a link within an email
- Visited a web-page
- Clicked on a link within a web-page

Customers may receive up to five messages (including reminders) over a 30-day period, depending on engagement level. This type of campaign can eliminate redundant messages or over marketing and increase customer engagement.

Email campaigns were designed in tandem with the corresponding awareness campaigns that featured the new creative for 2017 to reinforce messaging and generate familiarity amongst customers. The campaigns contained integrated messaging, directing customers to the online application process. Throughout the campaign, subject lines and content were modified based on customer behavior. See Appendix 2 for a sample of email creative.

Bill Inserts

The mandated annual CARE bilingual notification took place in July and November. All non-CARE customers who receive paper bills received the bilingual application in their SDG&E bill, while paperless bill customers received a link to view their monthly bill inserts. The bill insert promoted both the CARE and FERA programs and provided detailed information regarding income guidelines and requirements. In addition, a bilingual bill insert promoting the payment assistance and no cost home improvements was distributed in March

through the monthly bill. Examples of the bill inserts can be found in the Appendix 3.

Door-to-Door

SDG&E's outreach efforts with third-party contractors involved reaching out to multicultural/multilingual, low-income, and/or disabled customers who are eligible for the FERA discount programs utilizing a door to door strategy. This strategy is developed by looking at data analysis of the new CARE/FERA prospects and selecting areas where geographically a door-to-door representative would be most effective. In order to target these customers effectively with the best resources, SDG&E collaborated with The Harris Group (THG), a third party Diverse Business Enterprise (DBE) vendor, to implement this door-to-door campaign. THG canvassed these neighborhoods to directly interact with customers, in-language when necessary, to enroll them in the FERA program. There were 116 new FERA enrollments.

Outbound Calling

In its Live Call Campaign, THG utilized the data from the new CARE/FERA prospect list to successfully enroll qualified FERA customers. In 2017, THG had 1,828 FERA enrollments.

Community Outreach & Engagement

Community outreach allows SDG&E to connect and directly engage customers in energy savings solutions in the communities where they work and live. These

outreach activities provide information about our FERA Program to the customers that are eligible. Tactics utilized by SDG&E in this area include partnerships with social service agencies and nonprofit organizations, presentations, workshops/trainings, and participation at community events. These efforts lead to 400 FERA enrollments.

CARE Partners (Capitation Agencies)

SDG&E partners with social service community organizations that serve low-income and in-need clients every day. Agencies such as Women, Infants, and Children (WIC) can enroll customers through their intake process using the Commission adopted categorical qualifications for enrollment. Often the intake agencies provide a single point of contact for client information required by the Commission adopted categorical programs such as CalFresh/Supplemental Nutrition Assistance Program (SNAP), National School Lunch Program, Low-Income Home Energy Assistance Program (LIHEAP), Medicaid/Medi-Cal for Families A & B, etc., to enroll customers into program. In 2017, SDG&E worked closely with 19 partner agencies to enroll customers in the CARE and FERA Programs. These partners contributed to 17 FERA Program enrollments in 2017.

Energy Solutions Partner Network

SDG&E continues to work with an established network of more than 250 nonprofit and community-based organizations, collectively called the Energy Solutions Partner Network. This network helps coordinate enhanced outreach

efforts, including customized messaging, social media (Facebook, Twitter, Pinterest, Instagram, LinkedIn and YouTube) posts, special events and promotions. Largely grassroots, multicultural, and neighborhood centric, these organizations are diverse and provide direct services to populations including seniors, special needs/disabled, low-income and young families. In 2017, 1,560 activities were coordinated through this partner network to promote the CARE and FERA Programs.

Community Events & Presentations

SDG&E coordinates participation at hundreds of community events and presentations throughout its service area. Many of the partnerships established through Community Based Organizations host events to help the community with social services such as high blood pressure checks, free flu shots and dental check-ups. SDG&E believes it is an excellent opportunity for SDG&E to participate since the events often bring low-income and fixed income audiences. These events were for families with children, seniors, and disabled or special needs population. These community events also service our rural, native American and harder to reach populations. While these events and presentations may not bring in large volumes of program enrollments, it serves a greater need of educating and engaging customers. In 2017, SDG&E attended 1,156 presentations and events where CARE/FERA Programs were promoted.

Integration Efforts

SDG&E's FERA Report
January 1 – December 31, 2017

Integration efforts represent the combined efforts of internal resources to raise program awareness and create a positive customer experience. In 2017, SDG&E leveraged the following to help promote FERA: energy efficiency programs, interactive voice response (IVR) system, Energy Service Specialists (ESS) at its branch offices and Customer Contact Center, field collectors, collection calls, and informational brochures.

Customer Contact Center

SDG&E's Customer Contact Center assists thousands of customers with a variety of energy inquiries. In 2017, SDG&E's ESS added the ability to enroll customers who qualify for the CARE/FERA discount. This process helps to streamline the enrollment process while providing excellent customer service. Beginning in April 2017, the Customer Contact Center contributed to 16 FERA Program enrollments for 2017.

Branch Offices

SDG&E's Customer Assistance outreach team collaborates with its branch office staff and bill payment locations to provide training and presentations on the CARE, FERA and ESA Programs. In 2017, the outreach team and branch offices executed 18 customer engagement fairs that were held at branch office locations in SDG&E's service territory (Chula Vista, El Cajon, Market Creek, National City, Escondido) on high traffic days to help customers enroll in CARE/FERA & ESA programs. In 2017, the branch offices completed 32 applications and contributed to 29 new enrollments yielding a conversion rate of 91%.

Field Collection

SDG&E field collectors deliver notices to customers facing disconnection due to non-payment. Collectors are educated about the CARE and FERA Programs and advise customers to contact the Customer Contact Center for information.

Collection Call

SDG&E provides an additional outbound telephone call and a follow up letter to customers facing collection activity on their account. The letter includes information about solutions available to them including payment arrangements and information on the assistance programs. A sample letter is included in Appendix 4.

Informational Brochures

Brochures featuring other energy-saving solutions continue to include information on the customer assistance programs.

B. Discuss each of the following:

- 1. How FERA customer data and other relevant program information is shared within the utility, for example, between its Energy Savings Assistance Program and other appropriate low-income programs.**

FERA Program information is distributed in conjunction with the CARE Program. Both FERA and CARE Programs are promoted through a joint application form. All outreach efforts for FERA are combined with the CARE Program outreach. For example, all targeted direct mail and telephone campaigns promote the FERA Program through the joint application form. Customers entering income that exceeds the CARE guidelines but is within the FERA guidelines are enrolled in the FERA Program. Additionally, customer data received from the ESA Program regarding potentially eligible customers are shared with the FERA Program.

SDG&E also leverages FERA Program information with SDG&E's Middle Income Direct Install (MIDI) Program, which offers energy efficiency measures to this hard to reach customer segment. The MIDI Program leverages income verification practices, as well as FERA verification documentation, to simplify the enrollment processes for customers participating in the MIDI Program. Contractors conducting outreach for the MIDI Program also inform customers about the CARE, FERA and ESA Programs.

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

The greatest barrier to FERA participation is that customers feel reluctant to take a handout or that others are in greater need (expressed by rural customer focus group participants). FERA Program marketing, education and outreach efforts are leveraged with CARE Program efforts. CARE/FERA Program outreach is highly targeted to lower income areas with a number of tactics utilized to connect with potentially eligible customers including mass media campaigns, direct mail, email, print advertising, door-to-door canvassing, social media, events, presentations and workshops. Enrollments in the FERA Program often result from customer ineligibility in the CARE Program, with customer qualification based on household size and income eligibility within the FERA guidelines. For example, in 2017, SDG&E processed 5,714 applications, of which 5,029 were eligible and of that 4,093 were new FERA program enrollments.

SDG&E supplements FERA enrollment efforts through joint recruitment for the MIDI Program. The middle-income population is particularly hard-to-reach because they typically do not qualify for assistance programs and therefore do not seek help. In recognition of this, SDG&E utilizes different avenues as outlined in this report to target this hard-to-reach population.

IV. Processing FERA Applications⁸

A. Processing Self-Certification and Self-Recertification Applications (individual and sub-metered customers)

1. Provide the number of utility and third-party FERA self-certification and self-recertification applications provided, received, approved, denied, pending/never completed, or duplicates for the reporting period.

Table 4						
FERA Self-Certification and Self-Recertification Applications						
	Provided	Received	Approved	Denied	Pending/ Never Completed	Duplicates
Utility Capitation Other Third- Party	1,559,705	2,545	2,196	50	299	0
		77	65	2	10	0
		3149	2825	74	250	0
Total	1,559,705	5,771	5,086	126	559	0

B. Processing Random Post-Enrollment Verification Requests

1. Provide the total number of verifications requested, received, approved, denied, pending/never completed, or duplicates, for the reporting period.

	Requested	Received ⁹	Approved	Denied ¹⁰	Pending/Never Completed
Total	443	55	35	20	388

In 2017, the FERA Program began to conduct random PEV of income. The same sampling percentage that is used currently in CARE was applied to the FERA selection (the sample is 6% of the population and is done through a random selection).

⁸ The SDG&E FERA Application is a part of the Bill Discount Application that includes CARE.

V. Program Management

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

In 2017, there were no significant issues or events that affected the management of the FERA program. In accordance with D.15-07-001, SDG&E continued to provide the FERA discount to an average effective line item discount of 12% which is applicable to all tiers. SDG&E continued to work closely with its Customer Contact Center employees and outreach contractors to educate them about the changes to the FERA Program discount.

In D.15-07-001, the Commission articulated its plan to conduct a third phase of its Residential Rate Reform proceeding to include, among other things, how the FERA Program could be modified to help large households conserve energy. A workshop was held on March 29, 2016, where it was decided that the IOUs would collect and provide data to the CARE Restructuring Working Group for their review. During the fourth quarter of 2017, SDG&E provided the CARE Restructuring Working Group with a final dataset. The purpose of the CARE dataset is to determine if and how CARE should be restructured. SDG&E anticipates continuing to meet and discuss CARE Restructuring in 2018.

⁹ Received and Approved includes CARE ineligible Post Enrollment Verification Requests that are eligible for FERA.

¹⁰ Denied includes FERA ineligible Post Enrollment Verification Requests that are eligible for CARE.

B. Post Enrollment Verification (PEV) to provide proof of income.

SDG&E selects no more than 6% of the FERA-eligible customers a year for the PEV process. A probability score is applied to each account using the CISCO System Probability Model. Each month, accounts are selected based on their probability score. A lower score suggests that the customer is less likely to be eligible. A customer selected for PEV is required to provide documentation of eligibility for continued participation in the FERA Program.

The customer may satisfy this requirement by providing the following:

- Proof of earnings as determined by household member count and household income.
-

Customers are given 90 days to respond to verification before they are removed from the program. As long as the customer provides acceptable documentation (even if responding after the deadline), they can remain enrolled or be re-enrolled in the program.

APPENDIX 1-4


FERA Program

APPENDIX

FERA Program:

- 1. Sample Print Ads**
- 2. Sample Email Campaign**
- 3. Sample Bill Insert**
- 4. Sample Credit and Collections Notices**

Appendix 1 - Sample English Print Ads



30% BILL SAVINGS

Means one less thing to worry about.



Get started now.

If you're on a limited income, or you have financial challenges, we want to help. You may qualify for a monthly bill discount of 30% or even more. We can also help you become more energy efficient with free home upgrades.

To learn more about our assistance programs visit us at sdge.com/billsavings. Or call 1-877-646-5525.

SDGE
A Sanpra Energy utility

High energy use could result in removal from the program.
These programs are funded by California utility customers and administered by San Diego Gas & Electric under the auspices of the California Public Utilities Commission.

  ©2017 San Diego Gas & Electric Company. Trademarks are the property of their respective owners. All rights reserved.

Appendix 1 - Sample English Print Ads



30% BILL SAVINGS

Means one less thing to worry about.

Get started now.

If you're on a limited income, or you have financial challenges, we want to help. You may qualify for a monthly bill discount of 30% or even more. We can also help you become more energy efficient with free home upgrades.

To learn more about our assistance programs visit us at sdge.com/billsavings. Or call 1-877-646-5525.



High energy use could result in removal from the program.
These programs are funded by California utility customers and administered by San Diego Gas & Electric under the auspices of the California Public Utilities Commission.



©2017 San Diego Gas & Electric Company. Trademarks are the property of their respective owners. All rights reserved.

Appendix 1 - Sample Spanish Print Ad



30% *DE AHORRO
EN LA FACTURA*

*Significa una
preocupación
menos.*

**Empiece ahora
mismo.**

Si tiene un ingreso limitado o atraviesa dificultades económicas, queremos ayudar. Puede tener derecho a recibir un descuento en la factura mensual de 30% o hasta más. También podemos ayudarle a volverse más eficiente en energía con mejoras gratuitas en el hogar.

Si desea conocer más acerca de nuestros programas de asistencia, visítenos en sdge.com/ahorro. O llame al 1-877-646-5525.



El consumo elevado de energía podría dar como resultado el que se le retire del programa.

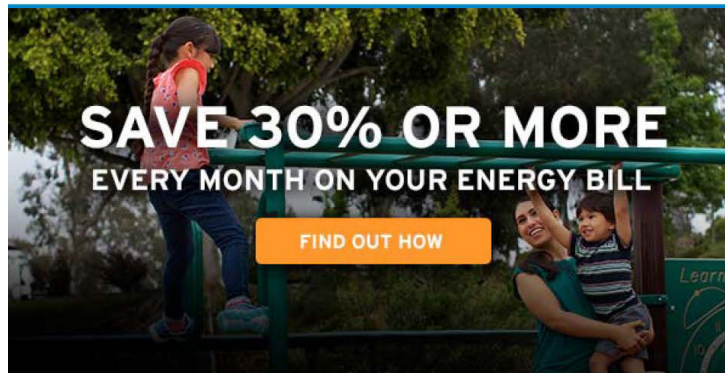
Estos programas están financiados por los clientes de las empresas de servicios públicos de California y administrados por San Diego Gas & Electric, bajo los auspicios de la Comisión de Servicios Públicos de California.



©2017 San Diego Gas & Electric Company. Las marcas registradas son propiedad de sus respectivos dueños. Todos los derechos reservados.

Appendix 2 – Sample Email

Need some extra help with your energy bill? [See if you qualify for CARE](#)



Appendix 2 – Sample Email

See if you qualify for the CARE discount



If you're on a limited income you may qualify for the CARE discount.

This monthly bill discount can save you 30% or more. Simply fill out our form to see if you are eligible.

APPLY TODAY

To learn more about our assistance programs [visit us online](#) or call 1-877-646-5525.



If you're not already paying your bill online, you can set this up in [My Account](#).



Qualification for CARE is based on household income guidelines. High energy use could result in removal from the program. These programs are funded by California utility customers and administered by San Diego Gas & Electric under the auspices of the California Public Utilities Commission.

This email has been sent to smoyer@semprautilities.com as a promotional communication. To unsubscribe from emails like this, please [click here](#). To manage your email subscriptions please [click here](#). SDG&E® values your privacy, view our [privacy policy](#) and [privacy notice](#).

Having trouble seeing images, [click here](#) to view the web-version.

Copyright © 2017, San Diego Gas & Electric, All rights reserved.
8330 Century Park Court, San Diego, CA 92123

SDG&E's FERA Report January 1 – December 31, 2017

Appendix 3 – Sample Bill Insert

**NO POSTAGE
NECESSARY
IF MAILED
IN THE
UNITED STATES**

BUSINESS REPLY MAIL
FIRST CLASS PERMIT NO. 4000 SAN DIEGO, CA 92112-9985

ATTN: CARE PROGRAM
SAN DIEGO GAS & ELECTRIC
PO BOX 124831
SAN DIEGO CA 92112-9985

SDG&E® - General Information
1-800-487-7343
sdge.com

Save energy
Energy Savings Assistance Program
Free energy-saving home improvements
1-800-487-7343
sdge.com/energyassistance

Energy Savings Assistance Program
Home - electric
Residential energy-efficient products for your home
1-800-444-6333
sdge.com/energy

My energy savings
Free online analysis can show you ways to save
1-800-444-6333
sdge.com/energy

Get extra help
Level your energy bill payments every month
1-800-487-7343
sdge.com/levelpay

Bill payment assistance and other community resources
Near "211"
211and.org
LINEAP
State administered bill payment assistance and weatherization services.
Call the Department of Community Services and Development 1-866-475-6423 or call 211 for referral to a local agency.

California LifeLine
Discounted telephone service. Call your service provider.
cpcac.gov

© 2016 San Diego Gas & Electric Company. All rights reserved and trademarks clearly marked. FORM 100-17-03-0014 10/17 03A0001014 07/16 07/16

SDG&E® - Información general
1-800-338-7343
sdge.com/espanol

Ahorre energía
Energy Savings Assistance Program
Mejoras gratuitas que ahorran energía en el hogar
1-800-487-7343
sdge.com/energia

Energy Savings Assistance Program
Reembolsos para el hogar
Reembolsos en productos eficientes en energía para su hogar
1-800-444-6333
sdge.com/reembolsos

Analisis de mi Consumo de Energía
Lláme al 1-800-444-6333 para obtener más información.

Obtenga ayuda adicional
Nivela sus pagos mensuales de su factura de energía
Lláme al 1-800-338-7343 y pida que el Plan de Pago Nivelado (Lvl Pay Plan) asista para el pago de la factura y otros recursos de la comunidad.

Morosa "211"
211and.org
LINEAP
Servicios de asistencia para pago de la factura para impermeabilización, administrado por el estado. Llame al Departamento de Servicios y Desarrollo de la Comunidad al 1-866-475-6423 o llame al 211 para que le remita a una agencia de la localidad.

California LifeLine
Servicio telefónico con descuento. Llame a su proveedor de servicios.
cpcac.gov

SDG&E®
A Sempra Energy unity®

Save on your SDG&E® bill
Residential Rate Assistance

Ahorre en la factura de SDG&E
Asistencia Tarifal Residencial

Application/Formulario de Solicitud



It's easy to apply for SDG&E assistance programs. We offer two programs that may lower your monthly bill.

- California Alternative Rates for Energy (CARE): The CARE program offers a monthly discount on SDG&E bills for qualifying households. Qualification is based on total gross income of everyone living in the home (See the income guidelines below).
- Family Electric Rate Assistance (FERA): If you do not qualify for the CARE program, you may still qualify for the FERA program, which offers a monthly discount on electric bills for households of 3 or more people with a slightly higher income than required for CARE. See the FERA income guidelines below.

Rules for CARE and FERA participation

- You must notify SDG&E if you're no longer qualify.
- You may be asked to verify your income.
- Unacceptable energy usage levels could result in removal from the program.
- You must remain your enrollment when requested.
- You may not be claimed on another person's income tax return other than your spouse.
- The SDG&E you must be in your name and the address must be your primary residence.
- Your total current household income before deductions must be within the income levels in the chart for your household size. Your household is made up of everyone living in the home, including anyone who is claimed on your tax return.

Other ways to apply: sdge.com/apply or call 211. If you have questions or would like more information please email bill@sdge.com. For speech or hearing impaired customers, TDD/TTY is available at 1-877-688-7343.

INCOME QUALIFICATION FOR CARE & FERA PROGRAMS		
Household Size	CARE	FERA
1 or 2	\$15,440	\$16,440
3	\$19,440	\$20,440
4	\$23,440	\$24,440
5	\$27,440	\$28,440
6	\$31,440	\$32,440
7	\$35,440	\$36,440
8	\$39,440	\$40,440

*Effective June 1, 2016. May 31, 2017

Es fácil presentar una solicitud para los programas de asistencia de SDG&E. Ofrecemos dos programas que pueden reducir su factura mensual.

- Tarifa Alternativa para Energía en California (CARE): El programa CARE ofrece un descuento mensual en las facturas de SDG&E a los hogares que reúnen los requisitos. Los requisitos se basan en el ingreso total de cada uno de las personas que vive en el hogar (Vea los niveles de ingresos en la parte inferior de esta solicitud de inscripción en un programa de asistencia pública que le da derecho a participar).
- Programa Familiar de Reducción de Tarifas Eléctricas (FERA): Si no reúne los requisitos para el programa CARE, tal vez sí reúna los requisitos para el Programa FERA, que ofrece un descuento mensual en las facturas eléctricas de los hogares con 3 o más personas cuyo ingreso es ligeramente más alto que el que se requiere para CARE. Vea los Niveles de Ingreso de FERA que aparecen a continuación para averiguar si reúne los requisitos.

Reglas de participación para CARE y FERA

- Debe que notificar a SDG&E si no reúne los requisitos.
- Le pueden pedir que compruebe sus ingresos.
- Niveles inadecuados de uso de energía podrían resultar en remoción del programa.
- Debe renovar su estado cuando se lo requiera.
- No puede aparecer usted en la declaración del impuesto sobre el ingreso de otra persona que no sea su cónyuge.
- La solicitud de SDG&E debe estar a su nombre y su dirección debe ser su residencia principal.
- El ingreso total actual en el hogar, antes de deducciones, debe estar dentro de los niveles de ingresos correspondientes al número de personas que vive en su casa y que aparecen en el cuadro de los hogares de ingreso de los hogares de asistencia pública indicados en el cuadro de esta solicitud.

Otros formas de solicitar: sdge.com/apply o llamando al 211. Si tiene preguntas o desea obtener más información, por favor envíe un mensaje a bill@sdge.com. Para los clientes con problemas auditivos o del habla, llame al TDD/TTY llamando al 1-877-688-7343.

REQUISITOS DE INGRESO PARA LOS PROGRAMAS CARE Y FERA		
Tamaño del hogar	CARE	FERA
1 o 2	\$15,440	\$16,440
3	\$19,440	\$20,440
4	\$23,440	\$24,440
5	\$27,440	\$28,440
6	\$31,440	\$32,440
7	\$35,440	\$36,440
8	\$39,440	\$40,440

*Efectivo el 1 de junio de 2016. El 31 de mayo de 2017

Household Information: Please complete

Full Name (Last, First, Middle Initial) _____ Date of Birth _____

Home Address, Apartment, City, Zip Code, Mailing and Care Address(es), County, Village, Postal Code _____ Email Address _____

Household Income Eligibility: (for CARE or FERA Programs)

If you are currently in your household, please check all that apply. If you are not, please check all that apply.

- ☐ Full-time employment (including seasonal)
- ☐ Part-time employment (including seasonal)
- ☐ Unemployment benefits
- ☐ Social Security
- ☐ Disability or child support
- ☐ Cash or other income

Income before deductions: \$ _____

Income after deductions: \$ _____

Declaration: (Please read and sign below)

I declare that the information provided in this application is true and correct. I agree to provide proof of income if asked, agree to inform SDG&E if no longer qualify to receive the discount, agree that if my household size changes, I will notify SDG&E, and agree to pay back the discount received, understand that SDG&E can share my information with other utilities or their agents to enroll me in their assistance programs.

Customer Signature: _____ Date: _____

SDG&E's FERA Report
January 1 – December 31, 2017

Appendix 4 – Sample Credit and Collections Notices

Account:
Date Mailed:

Service Address:

This is the final notice before your service is shut off

Your immediate attention is needed to avoid having your service shut off. Please pay \$XXX.XX before MM/DD/YY.

If your service is shut off for non-payment all past due amounts you owe must be paid before we can restore your service. You may be billed for charges to re-establish service and you may be required to pay a deposit.

You can make your payment a number of different ways:

- Online at *sdge.com/myaccount*. There's no charge to pay online.
- On the phone by calling 1-800-386-0067. With BillMatrix you can use your Visa/MasterCard, Debit/ATM Card or electronic check.
- In person at one of our authorized payment locations or branch offices. Find one online at *sdge.com/residential/payment-locations*.
- With your phone using our mobile app. Visit *sdge.com/mobileapps* to get started.

Please have your account number handy if you decide to pay online or through BillMatrix. Your account number is at the top and bottom of this letter.

This is an urgent request so we ask that you please do not mail your payment. If your payment is returned because of insufficient funds, your service is subject to immediate shut off.

You may be eligible for financial assistance, our Level Pay Plan, payment arrangements and other income-qualified programs or discounts. Our Energy Service Specialists are here to help you. You can call us at 1-800-411-7343.

Si necesita ayuda para interpretar este aviso llámenos a 1-800-311-7343.

Please note – If you made a payment for the amount referenced above within the last few days or recently made a payment arrangement with us, please disregard this notice.

ACCOUNT NUMBER: xxxxxxxxxx	DATE DUE	MM/DD/YY
--------------------------------------	-----------------	----------