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

Application of San Diego Gas & Electric Company (U 902 E) for Authority to Update Electric Rate Design Regarding Residential Default Time-Of-Use Rates and Fixed Charges

Application 17-12-\_\_\_\_

APPLICATION OF SAN DIEGO GAS & ELECTRIC COMPANY (U 902 E) FOR AUTHORITY TO UPDATE ELECTRIC RATE DESIGN REGARDING RESIDENTIAL DEFAULT TIME-OF-USE RATES AND FIXED CHARGES

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**COMPANY** 

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## I. INTRODUCTION

Pursuant to Ordering Paragraph ("OP") 10 of Decision ("D.") 15-07-001 ("Rate Reform Decision"), Resolution E-4769 ("SDG&E Opt-In Pilot Resolution"), Resolution E-4848 ("SDG&E Default Pilot Resolution"), D.17-09-036 ("Section 745 Decision"), D.17-09-035 ("Fixed Charge Decision"), and the Rules of Practice and Procedure of the California Public Utilities Commission ("CPUC" or "Commission"), San Diego Gas & Electric Company ("SDG&E") hereby submits its Rate Design Window ("RDW") Application, seeking the following: (1) approval of SDG&E's proposed residential default time-of-use ("TOU") rates, effective January 1, 2019; (2) approval of SDG&E's proposed residential fixed charges and higher minimum bill, effective January 1, 2020; and (3) approval of SDG&E's default TOU migration plan, including its operational and marketing, education and outreach ("ME&O") approach. These proposals provide a framework for the direction of SDG&E's residential rates going forward and through the various changes related to imposition of default TOU rates generally.

## II. BACKGROUND

## A. Events Leading Up to R.12-06-013

To protect customers in response to the 2000-2001 energy crisis, Assembly Bill ("AB") 1X (2001) capped residential electricity rates for usage up to 130% of baseline at the then-current 2001 rate levels, meaning that rates up to this usage level could not be increased, although cost of service increased over time. As part of implementing the AB 1X rate cap, the Commission replaced the then-existing two-tiered rate structure with a multi-tiered rate structure on October 1, 2001, pursuant to D.01-09-059. Over time, however, the rates under this tiered structure increasingly departed from cost basis, resulting in rates that did not fairly reflect the cost to serve customers or provide useful price signals.

Specifically, electric rates for usage up to 130% of baseline (Tiers 1 and 2) were priced below cost and electric rates for usage above 130% of baseline (Tiers 3-5)<sup>2</sup> were priced above cost, meaning that higher-usage customers were subsidizing lower-usage customers. From January 1, 2001 to January 1, 2009, the differential between the lowest and highest non-California Alternate Rates for Energy ("CARE") tier rates increased from approximately 20% to 155%. On January 1, 2009, the lowest tier rate was approximately 30% below the residential class average rate while the highest tier rate was approximately 80% above the residential class average rate.

Recognizing a need for change, the California State Legislature enacted Senate Bill ("SB") 695 in 2009, which created a path for the Commission to examine residential electric rate design, including transitioning residential customers from tiered rates to TOU rates.

<sup>1</sup> Interim Opinion Adopting Rate Increases To Implement The Department Of Water Resources' Revenue Requirement (September 20, 2001).

<sup>&</sup>lt;sup>2</sup> SDG&E's tiered rate structure changed from five tiers to four tiers on May 1, 2008, pursuant to D.08-02-034.

Subsequently, on June 21, 2012, Order Instituting Rulemaking ("R.") 12-06-013<sup>3</sup> was opened to examine and reform the investor-owned-utilities' ("IOUs"") residential electric rates and transition to TOU rates.

Within R.12-06-013, the Commission adopted ten Rate Design Principles ("RDPs").<sup>4</sup> Table 1 below presents the RDPs in four categories (consistent with D.15-07-001): (1) cost of service; (2) affordable electricity; (3) conservation; and (4) customer acceptance.

**TABLE 1: RATE DESIGN PRINCIPLES** 

Cost of Service RDP	Affordable Electricity RDP	Conservation RDP	Customer Acceptance RDP
(2) Rates should be based on marginal cost; (3) Rates should be based on cost-causation principles; (7) Rates should generally avoid cross-subsidies, unless the cross-subsidies appropriately support explicit state policy goals; (8) Incentives should be explicit and transparent; (9) Rates should encourage economically efficient decision-	(1) Low-income and medical baseline customers should have access to enough electricity to ensure basic needs (such as health and comfort) are met at an affordable cost.	(4) Rates should encourage conservation and energy efficiency; (5) Rates should encourage reduction of both coincident and non-coincident peak demand.	(6) Rates should be stable and understandable and provide customer choice; (10) Transitions to new rate structures should emphasize customer education and outreach that enhances customer understanding and acceptance of new rates, and minimizes and appropriately considers the bill impacts associated with such transitions.

making.

<sup>&</sup>lt;sup>3</sup> Order Instituting Rulemaking on the Commission's Own Motion to Conduct a Comprehensive Examination of Investor Owned Electric Utilities' Residential Rate Structures, the Transition to Time Varying and Dynamic Rates, and Other Statutory Obligations (R.12-06-013).

<sup>&</sup>lt;sup>4</sup> D.15-07-001 at 27-28.

These principles reflect the need for Commission flexibility to approve balanced, unbundled rate design that accurately reflects how costs are incurred and through incentives that are addressed in a transparent manner.

#### B. R.12-06-013 to Date

In response to R.12-06-013, the IOUs and other parties submitted Residential Rate

Reform proposals on May 29, 2013. In its proposal, SDG&E submitted an optimal residential
rate design structure, adhering to the Commission's foregoing rate design principles.

Ultimately, on July 13, 2015, the Commission issued D.15-07-001, outlining Residential Rate
Reform for the IOUs. The decision adopted Phase 1 rate changes that reflect long-term
residential electric rate reform, directed the IOUs to plan and implement TOU pilots, and set
forth a glidepath for residential rate changes from 2015 through 2019. For 2015, D.15-07-001
allowed SDG&E to consolidate its four tiers into three. For 2016, D.15-07-001 also approved
the following glidepath for residential rates: (1) further consolidation from three tiers to two,
which included a redefinition of Tier 1 and Tier 2 usage; (2) reduction in tier differentials; (3)
reduction in baseline allowances; and (4) reduction in the CARE discount based on a glidepath
that would reduce the effective discount to 35% by 2020. In 2017, SDG&E implemented the
next step in the glidepath by further reducing the differential between the tiers and implementing
the high usage charge ("HUC").

## C. Residential Fixed Charges

California Public Utilities ("P.U.") Code §739.9 provided the Commission with authority to approve "new, or expand existing, fixed charges for the purpose of collecting a reasonable portion of the fixed costs of providing electric service to residential customers." In D.15-07-

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<sup>&</sup>lt;sup>5</sup> P.U. Code §739.9(e).

001, the Commission considered IOU proposals for new or increased fixed charges designed to collect certain fixed costs of providing service to all residential customers.<sup>6</sup> The Commission unanimously concluded that "[a] well-designed fixed charge representing a portion of the fixed customer-related costs to serve the individual residential customer could be reasonable," but that "[a]dopting a fixed charge at the same time as customers are also facing significant rate impacts associated with tier flattening would be inconsistent with our statutory duty to ensure reasonable rates." Ultimately, the Commission determined that "[a] fixed charge should not be implemented until after the tier collapse is complete and after default TOU has been implemented."

Subsequently, the Commission concluded that the determination of categories of fixed costs eligible for inclusion in a proposed fixed charge should be legislated within the Pacific Gas and Electric Company ("PG&E") General Rate Case GRC Phase 2 ("GRC P2") proceeding (A.16-06-013). As stated in D.15-07-001, the appropriateness and approval of any proposed fixed charges would then be considered in the IOUs' consolidated 2018 Residential RDW proceeding, along with the implementation of default residential TOU.

In 2017, the Commission issued D.17-09-035,<sup>10</sup> which determined "that a fixed charge should include revenue cycle services costs with certain exclusions, all meter capital costs, and minimum service drop and final line transformer costs calculated by using the minimum observed cost for the residential class."<sup>11</sup> P.U. Code Section 739.9(e) limited fixed charges at \$10 per month for residential customers not enrolled in the CARE program and at \$5 per month

<sup>&</sup>lt;sup>6</sup> D.15-07-001 at 189.

<sup>&</sup>lt;sup>7</sup> *Id.* at Conclusion of Law ("COL") 16.

<sup>&</sup>lt;sup>8</sup> *Id.* at COL 17.

<sup>&</sup>lt;sup>9</sup> *Id.* at COL 18

<sup>&</sup>lt;sup>10</sup> Decision Identifying Fixed Cost Categories to be Included in a Fixed Charge (September 28, 2017).

<sup>&</sup>lt;sup>11</sup> D.17-09-035 at 2.

for customers enrolled in the CARE program and authorizes the Commission to adjust this maximum allowable fixed charge no more than the annual percentage increase in the Consumer Price Index for the prior calendar year. P.U. Code Section 739.9(f) states that "[t]his subdivision applies to any default rate schedule, at least one optional tiered rate schedule, and at least one optional time variant rate schedule." Per D.17-09-035, SDG&E is required to include calculations of these costs under four different methodologies.

#### D. Residential TOU Pilots

Pursuant to D.15-07-001, SDG&E began two pilots: (1) the Opt-In TOU Pilot was approved by Resolution E-4769 and began on June 1, 2016; and (2) the Default TOU Pilot Plan was approved, with modifications, by Resolution E-4848 and will begin in March of 2018. The Opt-In TOU Pilot tested customer response to and acceptance of two TOU rates – a 3-period and a 2-period TOU rate. The Default TOU Pilot will test two default TOU rates, similar in structure to those tested in its Opt-In Pilot, and will focus on testing SDG&E's operational readiness for the full rollout of Default TOU, the impacts of different forms of ME&O on customers' awareness and engagement, as well as customer acceptance of the pilot rates. <sup>13</sup>

## E. P.U. Code §745

P.U. Code §745 excludes certain classes of customers from default TOU, and requires the IOUs to determine whether other classes would experience "unreasonable hardship"<sup>14</sup> because of default TOU. On January 23, 2017, an Assigned Commissioner and Administrative Law Judge Ruling Amending Scoping Memorandum and Ruling ("January 23, 2017 Ruling") was issued in R.12-06-013, seeking comments on a series of questions pertaining to TOU rates and P.U. Code

<sup>&</sup>lt;sup>12</sup> P.U. Code § 739.9(f).

<sup>&</sup>lt;sup>13</sup> Resolution E-4848 at 3.

<sup>&</sup>lt;sup>14</sup> PU Code §745(c)(1), §745(c)(2), §745(d).

§745. Parties submitted testimony in response to these questions, and workshops, which included limited evidentiary hearings, were held on May 18 and 22, 2017. On September 28, 2017, the Commission adopted D.17-09-036, which set forth guidelines around who is eligible to be transitioned onto the Default TOU Pilot rates in 2018. This Decision determined, among other things, that "economically vulnerable customers in hot climate zones should be excluded from the default time-of-use pilots scheduled to begin in March 2018" but that as a part of the 2018 Residential RDW applications, "the Commission will further consider whether economically vulnerable customers in hot climate zones should be excluded from the full rollout of default time-of-use rates." Accordingly, SDG&E's Default TOU Pilot will comply with the requirements outlined in D.17-09-036, including but not limited to the exclusion of CARE and Family Electric Rate Assistance ("FERA") customers within SDG&E's Hot Climate Zones. 17

#### III. SUMMARY OF RATE DESIGN PROPOSALS

This RDW Application is seeking approval of SDG&E's proposed residential default TOU rates, effective January 1, 2019; and residential fixed charges and higher minimum bill, effective January 1, 2020 (as noted below, the CARE discounts applicable under each proposal should be reflected in a line-item discount, consistent with D.15-07-001 and subject to certain exceptions). In conjunction with these specific rate design requests, SDG&E is also seeking approval of its default TOU migration plan, including its operational and ME&O approach. Each of these proposals is summarized below and further detailed in the Direct Testimony of SDG&E's witnesses.

<sup>&</sup>lt;sup>15</sup> D.17-09-036 at 2.

<sup>&</sup>lt;sup>16</sup> Id

<sup>&</sup>lt;sup>17</sup> SDG&E's Hot Climate Zone is defined as SDG&E's Desert and Mountain climate zones.

#### A. 2019 Residential Default TOU Rates

TOU pricing provides customers with a commodity price signal that informs customers of when the high cost hours for commodity services occur, and incentivizes changes in behavior that conserve or shift energy use. Due to SDG&E's system load shape, where the utility's commodity portfolio includes substantial solar generation in the local reliability area, energy is most expensive in the afternoon and evenings when fewer solar renewables are available and the majority of SDG&E's large residential population is at home. SDG&E's TOU periods were realigned in its recent GRC P2<sup>18</sup> to ensure that time differentiated price signals are occurring at the right times and are sending customers the right price signals. Accurately defined TOU periods will provide the right incentives to all customers, including those considering technology investments, whether it be investments in energy efficiency ("EE"), demand response ("DR"), or distributed energy resources ("DER").

For 2019, SDG&E proposes to offer a 3-Period Default TOU rate, which is a more cost-based rate and provides more accurate price signals. <sup>19</sup> Customers will be able to opt out of Mass TOU Default, should they wish to do so. As alternatives, SDG&E plans to offer a simpler 2-Period Opt-Out TOU rate and continue to have a Tiered Opt-Out rate available. SDG&E residential customers' default to TOU rates include bill protection to provide customers with a "risk-free" experience as they migrate to TOU rates. Accordingly, for 2019, SDG&E proposes the following rate options:

• A 3-Period tiered Default TOU rate as the Mass TOU Default rate: SDG&E's

Mass TOU Default rate (3-Period Default TOU rate) will be the same as its

<sup>&</sup>lt;sup>18</sup> D.17-08-030.

<sup>&</sup>lt;sup>19</sup> As described below, in 2020, SDG&E proposes to add a fixed charge to the 3-Period Default TOU rate, one year after the implementation of Mass TOU Default. See D.15-07-001 at 193.

Default Pilot Rate 1 in its TOU period definitions. SDG&E's Mass TOU Default rate will also include a Tier 1 adjustment credit, as the Commission has found "that the baseline credit...is an essential element of wide-scale TOU adoption for residential customers" and "that a SUE [Super User Electric] Surcharge should not be part of default TOU rates, but may be included in some optional TOU rates." SDG&E's baseline adjustment credit included in these TOU rates is set equal to the Tier 1 to Tier 2 differential of the effective tiered rates. This essentially eliminates the impact of a customer transitioning from SDG&E's tiered rates, and minimizes structural impacts to customers.

- A 2-Period tiered Opt-Out TOU rate as a simpler TOU rate option: As noted above, SDG&E will offer a 2-Period Opt-Out TOU rate for customers who do not wish to be on the 3-Period Default TOU rate and would prefer a simpler TOU rate option. The 2-Period Opt-Out TOU rate will be structurally the same in its TOU periods as Rate 2 in SDG&E's Opt-in and Default Pilots but with milder TOU differentials as reflected in the 2-Period Default Pilot rate. This simpler TOU rate will have two periods: on-peak and off-peak. It will also have reduced peak-to-off-peak differentials compared to the 3-Period Default rate, and will include a baseline credit. The rate is seasonally designed the same way as the 3-Period Default rate.
- A Tiered Opt-Out rate option: SDG&E will continue to offer its current tiered rate schedules as a Tiered Opt-Out rate for customers who do not wish to be on a TOU rate. This offering will be a two-tiered rate and include the HUC.<sup>21</sup>

<sup>&</sup>lt;sup>20</sup> D 15-07-001 at 140

<sup>&</sup>lt;sup>21</sup> HUC is also commonly referred to as the Super User Electric Surcharge ("SUE").

In addition, based on the alignment of TOU periods ordered by D.17-08-030, there is minimal difference between Schedule DR-SES (Domestic Time-Of-Use For Households With A Solar Energy System) and Schedule EV-TOU-2 (Electric Time-Of-Use For Electric Vehicle Charging). Accordingly, SDG&E proposes to close Schedule DR-SES to new customers and open the applicability of Schedule EV-TOU-2, making it available to all residential customers, to be renamed Schedule TOU-D, thus providing all residential customers with an option to select an un-tiered TOU rate. At a future date, SDG&E will seek the elimination of Schedule DR-SES, at which time these customers would be migrated to the new Schedule TOU-D. Grandfathered versions of all of SDG&E's existing rate schedules will remain available for eligible customers, in accordance with D.17-08-030.

## B. 2020 Residential Fixed Charges

Currently, for SDG&E's residential customers, the costs of utility services are recovered through an "all-in" energy, or volumetric, rate. While moving to TOU rates is a step in the right direction to provide customers with correct price signals, this all-volumetric rate structure allows some customers to bypass virtually all costs, which are shifted to other customers through an increase in rates. A residential fixed charge would promote fairness in rates, and is a critical step to provide some relief to SDG&E's high energy (cents/kWh) rates. A fixed charge may also increase the stability of many customers' bills, ensuring that each customer pays equitably for the service SDG&E provides with the benefit of reducing bill volatility. SDG&E believes it is important to note that a residential fixed charge would not be incremental; it would result in an offset in the reduction of energy (cents/kWh) rates. This is especially important for SDG&E's customers who continue to experience extremely high energy rates. Phase 1 of Residential Rate Reform was supposed to provide relief for these customers through tier consolidation and the glidepath, but SDG&E's residential population continues to experience these high rates. The

introduction of a residential fixed charge should help to provide some relief from these energy rates, where the current summer Tier 2 rate is 47 cents per kWh.<sup>22</sup>

D.15-07-001 concluded that a fixed charge or minimum bill that recovers customer-related costs would result in a more equitable rate for low usage customers such as vacation homeowners and some NEM customers, <sup>23</sup> and that a fixed charge to reflect fixed costs would send a more accurate price signal to customers. <sup>24</sup> Moving toward a more equitable system is imperative; SDG&E's customers who do not pay their fair cost of service have shifted costs to other ratepayers, increasing their rates and bills. If more balance is not introduced into SDG&E's rate structure, this inequity will persist and grow within default TOU rates as customers continue to move toward new technologies and energy production sources.

It should be noted that fixed charges are a component of many utility rates across the nation, as demonstrated in the Direct Testimony of Cynthia Fang. Indeed, in a survey of national electric IOUs, 96% have a basic residential service rate schedule that includes a fixed charge.

Moreover, in California, 77% of IOUs have a basic residential service rate schedule that includes a fixed charge rate component as of October 2017, and the average Fixed Charge was \$10.22.

## 1. Customer Survey

SDG&E recognizes that customer acceptance and understanding is a fundamental underpinning to the successful implementation of a residential fixed charge. D.15-07-001 found that "...it is very clear that customers are unlikely to understand or accept the need for fixed charges without customer education." The Commission also stated that "[a]lthough we agree...it is beyond dispute that the record in this proceeding shows substantial customer

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<sup>&</sup>lt;sup>22</sup> Summer Tier 2 rate for Schedule DR effective December 1, 2017 per AL 3130-E/E-A/E-B.

<sup>&</sup>lt;sup>23</sup> D.15-07-001, FOF 163.

<sup>&</sup>lt;sup>24</sup> D.15-07-001, FOF 175.

<sup>&</sup>lt;sup>25</sup> D.15-07-001 at 216.

hostility to fixed charges on residential bills, we disagree with CforAT's [Center for Accessible Technology] contention that customer hostility cannot be cured with customer education."<sup>26</sup> Per D.17-09-035, "[t]he Commission expects a showing on the plans for marketing, education, and outreach efforts with respect to the proposed fixed charges in relation to the TOU rates and in compliance with the directives of D.15-07-001, if and when, a utility files a proposal for a fixed charge."<sup>27</sup> SDG&E agrees that without adequate, clear communication, customers are likely to believe that a fixed charge is an incremental charge on their bills when, in reality, a residential fixed charge is designed to decrease energy rates. These issues and the results of SDG&E's customer survey are discussed in greater detail in the Direct Testimony of witness Horace Tantum.

#### 2. **Fixed Charge Cost Calculation**

The distribution infrastructure components that would be recovered in SDG&E's proposed residential fixed charge would include categories of eligible customer-related fixed costs ("Eligible Fixed Costs"), as approved in D.17-09-035.<sup>28</sup> Eligible Fixed Costs include the costs of ensuring that customers are ready to receive services from the utility before they even begin to use electricity, also described as "curb to meter" services. These costs include: the cost of the meter (which provides the ability to measure a customer's energy and load); the cost of the services lines (which connect individual customers to their service transformer); the cost of the final line transformer (which steps down voltage to levels that are usable and safer); and the cost of customer services (which represents costs for such activities as customer service field, advanced metering, billing, credit and collections, branch office, customer contact center,

 $<sup>^{26}</sup>$  D.15-07-001 at 226 (internal footnote omitted).  $^{27}$  D.17-09-035 at 52.

<sup>&</sup>lt;sup>28</sup> D.17-09-035 at 33.

residential customer services, commercial and industrial services, communications, and customer programs).

Pursuant to D.17-09-035, the Eligible Fixed Costs calculated by SDG&E are based on the costs and methodologies presented in SDG&E's most recent GRC P2 proceeding. SDG&E proposes to use the final rental economic carrying charge ("RECC") Method costs from its Test Year ("TY") 2016 GRC P2 proceeding, escalated to the year of implementation. As shown in Attachment B of the Direct Testimony of William Saxe, the total Eligible Fixed Costs for SDG&E calculated by this method total \$10.02, when illustratively escalated to 2020 dollars. Recognizing the AB 327 limit of \$10 for the implementation of a residential fixed charge, SDG&E proposes a residential fixed charge of \$10 for non-CARE customers and \$5 for CARE, FERA and medical baseline customers as presented in the Direct Testimony of Jeffrey Shaughnessy.

## 3. Minimum Threshold of Service

As an IOU, SDG&E is the provider of last resort. This means that the utility is required to provide a minimum level of service to every customer, regardless of whether that customer actually uses energy provided by SDG&E. Although the recent decision about fixed charges determined that limited categories of customer costs are eligible for recovery in a fixed charge, SDG&E's infrastructure investment required to provide a minimum level of service to its customers runs the entire length of the grid, from the most direct customer-based costs, where customers receive electricity from the wires connected to their houses, to its generation capacity costs, built to meet SDG&E's system needs in a reliable and safe way. Without each of these classes of assets, SDG&E would not be able to provide service to its customers. Moreover, in

D.15-07-001, the Commission also stated: "We therefore find that the fixed charge caps do not apply to minimum bills." The Commission also stated that:

...it follows that Section 739.9(a) refers exclusively to non-volumetric charges that apply based on demand or the mere existence of a customer account. A minimum bill is neither. Rather, a minimum bill is "based on the applicable volumetric rate," unless "volumetric usage is so low that the resulting bill would be less than the minimum bill.<sup>30</sup>

Accordingly, as explained in the Direct Testimony of Mr. Shaughnessy, SDG&E proposes the implementation of a higher minimum bill amount based on a minimum level of service requirement: \$37.25 for non-CARE and \$18.62 for CARE, FERA, and medical baseline customers. SDG&E defines the minimum level of service requirement as the minimum observable value for customer related costs and a 1kW equivalent for all costs not driven by energy usage. The minimum bill would ensure that all customers pay for their minimum threshold of service provided by SDG&E, even if they are departing load or DER customers.

## 4. Composite Tier Methodology

D.15-07-001 determined that the IOUs must utilize the composite tier methodology (i.e., including the fixed charge amount as part of the Tier 1 rate for purposes of calculating the tier differential) when proposing a fixed charge in order to establish an appropriate gradual differential between rates for the respective blocks of usage.<sup>31</sup> Under this methodology, all revenues collected from the fixed charge must be used to reduce Tier 1 rates. Because of this requirement, the introduction of a fixed charge will provide no real relief for upper tier rates. Accordingly, SDG&E seeks reconsideration of the requirement that the composite tier methodology be used when calculating the tier differential in conjunction with a fixed charge.

<sup>&</sup>lt;sup>29</sup> D.15-07-001 at 225.

<sup>&</sup>lt;sup>30</sup> D.15-07-001 at 222.

<sup>&</sup>lt;sup>31</sup> D.15-07-001 COL 11.

## 5. Higher Fixed Charge Option

Under the current tiered rate structure, residential customers can see significant bill volatility from changes in energy usage from month to month. Even with a flat energy rate, customers can still see significant bill volatility from a rate design that recovers the majority of costs through energy rates. An optional rate with higher fixed charge and lower energy rates will provide an option for customers who value predictability and are seeking greater monthly bill stability. Based on D.17-08-030's approval of a higher fixed charge un-tiered TOU optional rate for residential customers, <sup>32</sup> SDG&E is proposing a higher fixed charge option to recover the average residential costs that are unrelated to energy usage and make this rate available to non-Master Meter residential customers. As explained in the Direct Testimony of Ms. Fang, this higher fixed charge option would be based on the total calculated fixed costs for the average residential service, which is \$67.30.

## C. Discounts for CARE Customers

D.15-07-001 adopted SDG&E's proposal to move its CARE discount out of volumetric rates and into a line-item discount, with the exception of the exemption from the Department of Water Resources Bond Charge ("DWR-BC"), California Solar Initiative ("CSI") and CARE Discount charges.<sup>33</sup> In addition, beginning on January 1, 2017, CARE customers are also exempt from paying Vehicle Grid Integration ("VGI") program costs.<sup>34</sup> In approving this approach, D.15-07-001 noted that parties are encouraged to "consider this approach for the other utilities in Phase 3 or in future proceedings." SDG&E continues to feel that a line-item discount is the best approach for providing customers with the CARE discount, as it is simple for

<sup>&</sup>lt;sup>32</sup> D.17-08-030 at 34.

<sup>&</sup>lt;sup>33</sup> D.15-07-001 at 237.

<sup>&</sup>lt;sup>34</sup> D.16-01-045, COL 38.

<sup>&</sup>lt;sup>35</sup> D.15-07-001 at 237.

SDG&E to explain, easy for customers to understand, and an equitable method for providing a discount to all of SDG&E's CARE-enrolled customers. As such, SDG&E supports the Commission's prior recommendation that this discount structure be considered for implementation by PG&E and Southern California Edison Company ("SCE").

## D. Mass TOU Default Migration Plan

SDG&E's Mass TOU Default will result in the migration of approximately 750,000 eligible residential customers onto TOU rates over a ten-month period in 2019. In the Direct Testimony of Chris Bender and Horace Tantum, SDG&E presents its migration plan, including its operational and ME&O approach to implementing this plan. Such planning is critical to ensuring a successful roll out of Mass TOU Default. Among other things, the migration plan builds upon findings in two residential TOU pilots designed to assess customer experience, evaluate a variety of rate designs, and test operational readiness.

## IV. SUMMARY OF DIRECT TESTIMONY

This RDW Application, including the foregoing proposals is supported by the Direct Testimony of the following SDG&E witnesses.

## • Chapter 1: Policy – Cynthia Fang

Ms. Fang presents background information regarding Residential Rate Reform issues and explains how SDG&E's proposals are consistent with Commission policy and recent decisions related to residential rate design.

## • Chapter 2: Rate Design – Jeffrey Shaughnessy

Mr. Shaughnessy presents the details of SDG&E's electric rate design proposals and the customer bill impacts of these proposals, as well as various PU Code Section 745 requirements.

## • Chapter 3: GHG Compliance Requirement – Ben Montoya

Mr. Montoya presents GHG reduction analysis and potential energy savings.

• Chapter 4: Pilot Results – Leslie Willoughby

Ms. Willoughby presents the load impact results of SDG&E's Opt-In TOU Pilot.

• Chapter 5: Marginal Distribution Customer Costs – William Saxe

Mr. Saxe presents distribution customer cost study analysis to support SDG&E's proposal to introduce a residential fixed charge.

• **Chapter 6**: Implementation Plan – Chris Bender

Mr. Bender presents SDG&E's Mass TOU Default migration plan.

• **Chapter 7**: ME&O – Horace Tantum

Mr. Tantum presents SDG&E's intentions for ME&O related to SDG&E's Mass TOU Default and other residential rate proposals in this filing.

## V. STATUTORY AND PROCEDURAL REQUIREMENT

## A. Rule 2.1 (a) - (c)

In accordance with Rule 2.1 (a) - (c) of the Commission's Rules of Practice and Procedure, SDG&E provides the following information.

## 1. **Rule 2.1 (a) - Legal Name**

SDG&E is a corporation organized and existing under the laws of the State of California. SDG&E is engaged in the business of providing electric service in a portion of Orange County and electric and gas service in San Diego County. SDG&E's principal place of business is 8330 Century Park Court, San Diego, California 92123. SDG&E's attorney in this matter is John A. Pacheco.

## 2. Rule 2.1 (b) - Correspondence

Correspondence or communications regarding this Application, including discovery requests, should be addressed to:

Michelle Somerville Regulatory Case Manager San Diego Gas & Electric Company 8330 Century Park Court, CP 32 San Diego, California 92123 Telephone: (858) 654-6356 Facsimile: (858) 654-1879 msomerville@semprautilities.com

with copies to:

John A. Pacheco Attorney for: San Diego Gas & Electric Company 8330 Century Park Court, CP32 San Diego, CA 92123 Telephone: (858) 654-1761

Facsimile: (619) 699-5027 jpacheco@semprautilities.com

## 3. Rule 2.1 (c)

## a. Proposed Category of Proceeding

In accordance with Rule 7.1, SDG&E requests that this Application be categorized as ratesetting because the rate design changes that are the subject of this RDW Application will impact the rates of certain customer groups.

## b. Need for Hearings

SDG&E does not believe that approval of this Application will require hearings. SDG&E has provided ample supporting testimony, analysis and documentation that provide the Commission with a sufficient record upon which to grant the relief requested.

#### c. Issues to be Considered

The issues to be considered are described in this Application and the accompanying Direct Testimony, including the attached appendices. Regarding safety considerations, based on current information, SDG&E's rate design proposals will not result in any adverse safety impacts on the facilities or operations of SDG&E.

## d. Proposed Schedule

SDG&E proposes the following schedule:

<u>ACTION</u>	<b>DATE</b>
Application filed	December 13, 2017
ORA/Intervenor Testimony	May 2018
SDG&E Rebuttal Testimony	June 2018
Hearings (if necessary)	July 2018
Concurrent Briefs	August 2018
ALJ Proposed Decision	October 2018
Final Decision	December 2018

## B. Rule 2.2 – Articles of Incorporation

A copy of SDG&E's Restated Articles of Incorporation as last amended, presently in effect and certified by the California Secretary of State, was filed with the Commission on September 10, 2014 in connection with SDG&E's Application No. 14-09-008, and is incorporated herein by reference.

## C. Rule 3.2 (a) - (d) - Authority to Change Rates<sup>36</sup>

In accordance with Rule 3.2 (a) - (d) of the Commission's Rules of Practice and Procedure, SDG&E provides the following information.

## 1. Rule 3.2 (a) (1) – balance sheet

SDG&E's financial statement, balance sheet and income statement for the nine-month period ending June 30, 2017 are included with this Application as Appendix A.

 $<sup>^{36}</sup>$  Note Rule 3.2(a) (9) is not applicable to this application.

## 2. Rule 3.2 (a) (2) – statement of effective rates

Appendix B to this Application is a statement (i.e., Table of Contents) of all of SDG&E's presently effective electric rates, which can also be viewed on SDG&E's website.

## 3. Rule 3.2 (a) (3) – statement of proposed changes

A statement of proposed rate changes is attached as Appendix C.

## 4. Rule 3.2 (a) (4) – description of property and equipment

SDG&E is in the business of generating, transmitting and distributing electric energy to San Diego County and part of Orange County. SDG&E also purchases, transmits and distributes natural gas to customers in San Diego County. SDG&E has electric transmission, distribution and service lines in San Diego, Orange and Imperial Counties. This includes a composite 92% ownership in the 500,000 volt Southwest Powerlink including substations and transmission lines, which run through San Diego and Imperial Counties to the Palo Verde substation in Arizona. This also includes full ownership of the 500,000-volt Sunrise Powerlink including substations and transmission lines, which run through San Diego and Imperial Counties to the Imperial Valley substation. Gas facilities consist of the Moreno gas compressor station in Riverside County and the Rainbow compressor station located in San Diego County. The gas is transmitted through high and low-pressure distribution mains and service lines.

Applicant's original cost of utility plant, together with the related reserves for depreciation and amortization for the nine-month period ending September 30, 2016, is shown on the statement of Original Cost and Depreciation Reserve attached as Appendix D.

## 5. Rule 3.2 (a) (5) and (6) – summary of earnings

A summary of SDG&E's earnings (for the total utility operations for the company) for the nine-month period ending June 30, 2017, is included as Appendix E to this Application.

## 6. Rule 3.2 (a) (7) – statement re tax depreciation

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 plan 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.

## 7. Rule 3.2 (a) (8) – proxy statement

A copy of the most recent proxy statement sent to all shareholders of SDG&E's parent company, Sempra Energy, dated March 24, 2017, was mailed to the Commission on April 10, 2017, and is incorporated herein by reference.

## 8. Rule 3.2 (a) (10) – statement re pass through to customers

The rate changes that SDG&E seeks in this Application reflect estimated costs to SDG&E, and SDG&E proposes to pass through to customers only costs that SDG&E incurs for the proposed rate design changes.

## 9. Rule 3.2 (b) – notice to state, cities and counties

In compliance with Rule 3.2 (b) of the Commission's Rules of Practice and Procedure, SDG&E will, within twenty days after the filing this Application, mail a notice to the State of

California and to the cities and counties in its service territory and to all those persons listed in Appendix F to this Application.

## 10. Rule 3.2 (c) – newspaper publication

In compliance with Rule 3.2 (c) of the Commission's Rules of Practice and Procedure, SDG&E, within twenty days after the filing of this Application, will post in its offices and publish in newspapers of general circulation in each county in its service territory notice of this Application.

## 11. Rule 3.2 (d) – bill insert notice

In compliance with Rule 3.2 (d) of the Commission's Rules of Practice and Procedure, SDG&E, within 45 days of the filing of this Application, will provide notice of this Application to all of its customers along with the regular bills sent to those customers that will generally describe the proposed revenue requirement changes addressed in this Application.

## VI. SERVICE

This is a new application. No service list has been established. Accordingly, SDG&E will serve this Application on all parties to the service lists of Order Instituting Rulemaking on the Commission's Own Motion to Conduct a Comprehensive Examination of Investor Owned Electric Utilities' Residential Rate Structures, the Transition to Time Varying and Dynamic Rates, and Other Statutory Obligations (R.12-06-013). Hard copies will be sent by overnight mail to the Assigned Administrative Law Judges in R.12-06-013, Jeanne McKinney (Assigned Dec. 18, 2015), S. Pat Tsen (Assigned June 21, 2017) and Sophia Park (Assigned Feb. 7, 2017), and the Interim Chief Administrative Law Judge, Anne Simon.

## VII. REQUESTED RELIEF

WHEREFORE, SAN DIEGO GAS & ELECTRIC COMPANY requests that the Commission:

- Approve SDG&E's proposed residential default TOU rates, effective January 1, 2019;
- 2. Approve SDG&E's proposed residential fixed charges and higher minimum bill, effective January 1, 2020; and
- 3. Approve SDG&E's proposed default TOU migration plan, including its operational and ME&O approach.

Respectfully submitted,

By: /s/ JOHN A. PACHECO

John A. Pacheco Attorney for:

SAN DIEGO GAS & ELECTRIC COMPANY

8330 Century Park Court, CP32

San Diego, CA 92123

Telephone: (858) 665-1761 Facsimile: (619) 699-5027

E-mail: jpacheco@semprautilities.com

SAN DIEGO GAS & ELECTRIC COMPANY

Scott B. Crider

San Diego Gas & Electric Company

Vice President – Customer Services

DATED at San Diego, California, this 20th day of December 2017



## **OFFICER VERIFICATION**

Scott B. Crider declares the following:

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 OF SAN DIEGO GAS & ELECTRIC COMPANY (U 902 E) FOR AUTHORITY TO UPDATE ELECTRIC RATE DESIGN REGARDING RESIDENTIAL DEFAULT TIME-OF-USE RATES AND FIXED CHARGES 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 on December 20, 2017 at San Diego, California.

Scott B. Crider

San Diego Gas & Electric Company Vice President – Customer Services

## **APPENDIX A**

# Financials, Balance Sheet, Income Statement

# SAN DIEGO GAS & ELECTRIC COMPANY BALANCE SHEET ASSETS AND OTHER DEBITS June 30, 2017

	1. UTILITY PLANT		2017
101 102	UTILITY PLANT IN SERVICE UTILITY PLANT PURCHASED OR SOLD	\$ 16	,513,440,119
104 105	UTILITY PLANT LEASED TO OTHERS PLANT HELD FOR FUTURE USE		85,194,000 5,302,629
106 107	COMPLETED CONSTRUCTION NOT CLASSIFIED CONSTRUCTION WORK IN PROGRESS	1	- ,209,833,401
108 111	ACCUMULATED PROVISION FOR DEPRECIATION OF UTILITY PLANT ACCUMULATED PROVISION FOR AMORTIZATION OF UTILITY PLANT		,077,315,986) (706,634,782)
114 115 118	ELEC PLANT ACQUISITION ADJ ACCUM PROVISION FOR AMORT OF ELECTRIC PLANT ACQUIS ADJ OTHER UTILITY PLANT	1	3,750,722 (1,375,264) ,232,930,800
119	ACCUMULATED PROVISION FOR DEPRECIATION AND AMORTIZATION OF OTHER UTILITY PLANT		(288,724,048)
120	NUCLEAR FUEL - NET		
	TOTAL NET UTILITY PLANT	\$ 12	,976,401,591
	2. OTHER PROPERTY AND INVESTMENTS		
121 122	NONUTILITY PROPERTY ACCUMULATED PROVISION FOR DEPRECIATION AND	\$	5,790,994
158	AMORTIZATION NON-CURRENT PORTION OF ALLOWANCES		(364,300) 189,839,827
123 124	INVESTMENTS IN SUBSIDIARY COMPANIES OTHER INVESTMENTS		-
125 128	SINKING FUNDS OTHER SPECIAL FUNDS	1	,028,081,830
175	LONG-TERM PORTION OF DERIVATIVE ASSETS		74,288,025
	TOTAL OTHER PROPERTY AND INVESTMENTS	\$ 1	,297,636,376

Data from SPL as of August 18, 2017

# SAN DIEGO GAS & ELECTRIC COMPANY BALANCE SHEET ASSETS AND OTHER DEBITS June 30, 2017

	3. CURRENT AND ACCRUED ASSETS	2017
131 132 134 135 136	CASH INTEREST SPECIAL DEPOSITS OTHER SPECIAL DEPOSITS WORKING FUNDS TEMPORARY CASH INVESTMENTS	\$ 2,274,181 - - 500
141 142 143 144 145 146 151	NOTES RECEIVABLE CUSTOMER ACCOUNTS RECEIVABLE OTHER ACCOUNTS RECEIVABLE ACCUMULATED PROVISION FOR UNCOLLECTIBLE ACCOUNTS NOTES RECEIVABLE FROM ASSOCIATED COMPANIES ACCOUNTS RECEIVABLE FROM ASSOCIATED COMPANIES FUEL STOCK	310,617,726 19,948,089 (3,501,255) 8,573 1,586,259 525,924
152 154 156 158 158 163 164 165	FUEL STOCK EXPENSE UNDISTRIBUTED PLANT MATERIALS AND OPERATING SUPPLIES OTHER MATERIALS AND SUPPLIES ALLOWANCES LESS: NON-CURRENT PORTION OF ALLOWANCES STORES EXPENSE UNDISTRIBUTED GAS STORED PREPAYMENTS	123,461,757 - 206,101,784 (189,839,827) 306,762 306,473 128,057,507
171 173 174 175 175	INTEREST AND DIVIDENDS RECEIVABLE ACCRUED UTILITY REVENUES MISCELLANEOUS CURRENT AND ACCRUED ASSETS DERIVATIVE INSTRUMENT ASSETS LESS: LONG -TERM PORTION OF DERIVATIVE INSTRUMENT ASSETS	716,315 60,828,000 2,294,000 102,790,995 (74,288,025)
	TOTAL CURRENT AND ACCRUED ASSETS	\$ 692,195,738
	4. DEFERRED DEBITS	
181 182 183 184 185	UNAMORTIZED DEBT EXPENSE UNRECOVERED PLANT AND OTHER REGULATORY ASSETS PRELIMINARY SURVEY & INVESTIGATION CHARGES CLEARING ACCOUNTS TEMPORARY FACILITIES	\$ 34,594,708 2,925,428,704 338,964 (294,187) 20
186 188 189 190	MISCELLANEOUS DEFERRED DEBITS RESEARCH AND DEVELOPMENT UNAMORTIZED LOSS ON REACQUIRED DEBT ACCUMULATED DEFERRED INCOME TAXES	23,171,630 - 10,395,430 318,703,002
	TOTAL DEFERRED DEBITS	\$ 3,312,338,271
	TOTAL ASSETS AND OTHER DEBITS	\$ 18,278,571,976

## SAN DIEGO GAS & ELECTRIC COMPANY BALANCE SHEET LIABILITIES AND OTHER CREDITS June 30, 2017

	5. PROPRIETARY CAPITAL	2017
201 204 207 210	COMMON STOCK ISSUED PREFERRED STOCK ISSUED PREMIUM ON CAPITAL STOCK GAIN ON RETIRED CAPITAL STOCK	\$ 291,458,395 - 591,282,978
211 214 216 219	MISCELLANEOUS PAID-IN CAPITAL CAPITAL STOCK CAPITAL STOCK EXPENSE UNAPPROPRIATED RETAINED EARNINGS ACCUMULATED OTHER COMPREHENSIVE INCOME	479,665,368 (24,605,640) 4,439,320,726 (7,260,582)
	TOTAL PROPRIETARY CAPITAL	\$ 5,769,861,245
	6. LONG-TERM DEBT	
221 223 224	BONDS ADVANCES FROM ASSOCIATED COMPANIES OTHER LONG-TERM DEBT	\$ 4,591,077,000 - -
225 226	UNAMORTIZED PREMIUM ON LONG-TERM DEBT UNAMORTIZED DISCOUNT ON LONG-TERM DEBT	(12,072,563
	TOTAL LONG-TERM DEBT	\$ 4,579,004,437
	7. OTHER NONCURRENT LIABILITIES	
228.3	OBLIGATIONS UNDER CAPITAL LEASES - NONCURRENT ACCUMULATED PROVISION FOR INJURIES AND DAMAGES ACCUMULATED PROVISION FOR PENSIONS AND BENEFITS ACCUMULATED MISCELLANEOUS OPERATING PROVISIONS LONG TERM PORTION OF DERIVATIVE LIABILITIES	\$ 1,059,813,950 23,454,995 247,807,441 - 174,994,502
230	ASSET RETIREMENT OBLIGATIONS  TOTAL OTHER NONCURRENT LIABILITIES	\$39,206,532 \$2,345,277,420

## SAN DIEGO GAS & ELECTRIC COMPANY BALANCE SHEET LIABILITIES AND OTHER CREDITS June 30, 2017

	8. CURRENT AND ACCRUED LIABILITES	2017
231 232 233 234 235 236 237 238 241 242 243 244 244 245	NOTES PAYABLE ACCOUNTS PAYABLE NOTES PAYABLE TO ASSOCIATED COMPANIES ACCOUNTS PAYABLE TO ASSOCIATED COMPANIES CUSTOMER DEPOSITS TAXES ACCRUED INTEREST ACCRUED DIVIDENDS DECLARED TAX COLLECTIONS PAYABLE MISCELLANEOUS CURRENT AND ACCRUED LIABILITIES OBLIGATIONS UNDER CAPITAL LEASES - CURRENT DERIVATIVE INSTRUMENT LIABILITIES LESS: LONG-TERM PORTION OF DERIVATIVE LIABILITIES DERIVATIVE INSTRUMENT LIABILITIES - HEDGES	\$ 4,599,706 473,954,108 - 26,226,170 77,486,341 1,536,337 45,728,091 - 2,776,345 111,890,445 50,892,477 223,733,662 (174,994,502)
	TOTAL CURRENT AND ACCRUED LIABILITIES	\$ 843,829,180
	9. DEFERRED CREDITS	
252 253 254 255 257 281 282 283	CUSTOMER ADVANCES FOR CONSTRUCTION OTHER DEFERRED CREDITS OTHER REGULATORY LIABILITIES ACCUMULATED DEFERRED INVESTMENT TAX CREDITS UNAMORTIZED GAIN ON REACQUIRED DEBT ACCUMULATED DEFERRED INCOME TAXES - ACCELERATED ACCUMULATED DEFERRED INCOME TAXES - PROPERTY ACCUMULATED DEFERRED INCOME TAXES - OTHER	\$ 58,925,476 381,335,924 1,018,973,062 16,797,674 - - 2,366,486,504 898,081,054
	TOTAL DEFERRED CREDITS	\$ 4,740,599,694
	TOTAL LIABILITIES AND OTHER CREDITS	\$ 18,278,571,976
		\$4,740,599,694

Data from SPL as of August 18, 2017

### SAN DIEGO GAS & ELECTRIC COMPANY FINANCIAL STATEMENT June 30,2017

(a)	Amounts and Kinds of Stock Authorized:			
	Common Stock	255,000,000	shares	Without Par Value
	Amounts and Kinds of Stock Outstanding:			
	Common Stock	116,583,358	shares	291,458,395

## (b) **Brief Description of Mortgage:**

Full information as to this item is given in Application Nos. 93-09-069,04-01-009, 06-05-015, 08-07-029, 10-10-023, 12-03-005, and 15-08-011 to which references are hereby made.

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

	Nominal	Par Value		
				Interest Paid
	Date of	Authorized		(updated in Q4' 20xx)
First Mortgage Bonds:	Issue	and Issued	Outstanding	as of Q4' 2016
Var% Series OO, due 2027	12-01-92	0	0	2,625,00
5.875% Series VV, due 2034	06-17-04	43,615,000	43,615,000	2,562,34
5.875% Series WW, due 2034	06-17-04	40,000,000	40,000,000	2,350,00
5.875% Series XX, due 2034	06-17-04	35,000,000	35,000,000	2,056,2
5.875% Series YY, due 2034	06-17-04	24,000,000	24,000,000	1,410,0
5.875% Series ZZ, due 2034	06-17-04	33,650,000	33,650,000	1,976,9
4.00% Series AAA, due 2039	06-17-04	75,000,000	75,000,000	3,000,0
5.35% Series BBB, due 2035	05-19-05	250,000,000	250,000,000	13,375,0
6.00% Series DDD. due 2026	06-08-06	250,000,000	250,000,000	15,000,0
1.65% Series EEE, due 2018	09-21-06	161,240,000	161,240,000	2,660,4
6.125% Series FFF, due 2037	09-20-07	250,000,000	250,000,000	15,312,5
6.00% Series GGG, due 2039	05-14-09	300,000,000	300,000,000	18,000,0
5.35% Series HHH, due 2040	05-13-10	250,000,000	250,000,000	13,375,0
4.50% Series III, due 2040	08-26-10	500,000,000	500,000,000	22,500,0
3.00% Series JJJ, due 2021	08-18-11	350,000,000	350,000,000	10,500,0
3.95% Series LLL, due 2041	11-17-11	250,000,000	250,000,000	9,875,0
4.30% Series MMM, due 2042	03-22-12	250,000,000	250,000,000	10,750,0
3.60% Series NNN, due 2023	09-09-13	450,000,000	450,000,000	16,200,0
Variable Series OOO, due 2017	03-12-15	0	0	1,210,9
1.9140% Series PPP, due 2022	03-12-15	66,600,519	66,600,519	4,272,3
2.50% Series QQQ, due 2026	05-19-16	500,000,000	500,000,000	6,111,1
3.75% Series RRR, due 2047	06-08-17	400,000,000	400,000,000	
Total 1st. Mortgage Bonds:	•		4,479,105,519	175,122,8
Total Bonds:				175,122,8

TOTAL LONG-TERM DEBT		4,479,105,519	

## SAN DIEGO GAS & ELECTRIC COMPANY FINANCIAL STATEMENT

June 30, 2017

Other Indebtedness:	Date of Issue	Date of Maturity	Interest Rate	Outstanding	Interest Paid 2017
Commercial Paper & ST Bank	Various	Various	Various	4,599,706	\$1,149,047

## Amounts and Rates of Dividends Declared:

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

Preferred Stock	Shares Outstanding	2013	2014	2015	2016	2017
5.00%	-	\$281,250	-	-	-	-
4.50%	-	202,500	-	-	-	-
4.40%	-	214,500	-	-	-	-
4.60%	-	257,901	-	-	-	-
1.70%	-	1,785,000	-	-	-	-
1.82%	-	873,600	-	-	-	-
Total	-	\$3,614,751	-	•	-	-

Common Stock	2013	2014	2015	2016	2017
[1]	-	\$200,000,000	300,000,000	175,000,000	175,000,000

## NOTE 11 PREFERRED STOCK 10K:

On October 15, 2013, SDG&E redeemed all six series of its outstanding shares of contingently redeemable preferred stock for \$82 million, including a \$3 million early call premium.

A balance sheet and a statement of income and retained earnings of applicant for the six months ended June 30, 2017 are attached hereto.

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

# SAN DIEGO GAS & ELECTRIC COMPANY STATEMENT OF INCOME AND RETAINED EARNINGS Six Months Ended June 30, 2017

## 1. UTILITY OPERATING INCOME

400 401 402 403-7 408.1 409.1 410.1 411.1 411.4 411.6	OPERATING REVENUES OPERATING EXPENSES MAINTENANCE EXPENSES DEPRECIATION AND AMORTIZATION EXPENSES TAXES OTHER THAN INCOME TAXES INCOME TAXES PROVISION FOR DEFERRED INCOME TAXES PROVISION FOR DEFERRED INCOME TAXES - CREDIT INVESTMENT TAX CREDIT ADJUSTMENTS GAIN FROM DISPOSITION OF UTILITY PLANT	\$	1,345,039,484 71,067,061 314,453,375 64,105,315 45,744,462 108,315,692 (14,216,365) 762,402		2,299,314,811
	TOTAL OPERATING REVENUE DEDUCTIONS				1,935,271,426
	NET OPERATING INCOME			\$	364,043,385
	2. OTHER INCOME AND DEDUCTIONS				
415 417 417.1 418 418.1 419 419.1 421 421.1	REVENUE FROM MERCHANDISING, JOBBING AND CONTRACT WORK REVENUES OF NONUTILITY OPERATIONS EXPENSES OF NONUTILITY OPERATIONS NONOPERATING RENTAL INCOME EQUITY IN EARNINGS OF SUBSIDIARIES INTEREST AND DIVIDEND INCOME ALLOWANCE FOR OTHER FUNDS USED DURING CONSTRUCTION MISCELLANEOUS NONOPERATING INCOME GAIN ON DISPOSITION OF PROPERTY	\$	14,588 - 16,448 - 3,757,665 30,734,726 158,110 - 34,681,537		
	TOTAL OTTLEN MOOME	Ψ	01,001,007		
421.2 425 426	LOSS ON DISPOSITION OF PROPERTY MISCELLANEOUS AMORTIZATION MISCELLANEOUS OTHER INCOME DEDUCTIONS	\$	125,024 1,725,364		
	TOTAL OTHER INCOME DEDUCTIONS	\$	1,850,388	•	
408.2 409.2 410.2 411.2	TAXES OTHER THAN INCOME TAXES INCOME TAXES PROVISION FOR DEFERRED INCOME TAXES PROVISION FOR DEFERRED INCOME TAXES - CREDIT TOTAL TAXES ON OTHER INCOME AND DEDUCTIONS	\$	326,971 362,641 24,402,273 (21,440,137) 3,651,748		
	TOTAL OTHER INCOME AND DEDUCTIONS			\$	29,179,401
	INCOME BEFORE INTEREST CHARGES EXTRAORDINARY ITEMS AFTER TAXES NET INTEREST CHARGES* NET INCOME			\$	393,222,786 233,112 89,272,789 304,183,109

\*NET OF ALLOWANCE FOR BORROWED FUNDS USED DURING CONSTRUCTION, (\$9,812,680)

### SAN DIEGO GAS & ELECTRIC COMPANY STATEMENT OF INCOME AND RETAINED EARNINGS Six Months Ended June 30, 2017

3. RETAINED EARNINGS	
RETAINED EARNINGS AT BEGINNING OF PERIOD, AS PREVIOUSLY REPORTED	\$ 4,310,137,617
NET INCOME (FROM PRECEDING PAGE)	304,183,109
DIVIDEND TO PARENT COMPANY	-
DIVIDENDS DECLARED - PREFERRED STOCK	0
DIVIDENDS DECLARED - COMMON STOCK	(175,000,000)
OTHER RETAINED EARNINGS ADJUSTMENTS	0
RETAINED EARNINGS AT END OF PERIOD	\$ 4,439,320,726

## **APPENDIX B**

## Statement of Presently Effective Electric Rates



Revised

Cal. P.U.C. Sheet No.

29795-E

Canceling R

Revised

Cal. P.U.C. Sheet No.

Cal. P.U.C. Sheet No

28386-E Sheet 1

Τ

### **TABLE OF CONTENTS**

The following sheets contain all the effective rates and rules affecting rates, service and information relating thereto, in effect on the date indicated herein.

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II. Balancing Accounts	
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San Diego, California

Canceling Revised Cal. P.U.C. Sheet No.

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TCRE	Customer Renewable Energy	20882, 20883-E
NEM-V	Virtual Net Metering for Multi-Tenant and Meter	23222, 22934, 23333, 23334, 23965-E
	Properties	23966, 23967, 29409-E
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RES-BCT	Renewable Energy Self-Generation Bill Credit Transfer	29722, 29724, 22584, 22585, 222586-E
ECO	Energy Credit Option	21280, 21281, 21282, 21283-E
SPSS	Station Power Self Supply	21625, 21626, 21627, 21628-E
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GHG-ARR	Greenhouse Gas Allowance Rate Return	27051, 28823, 27052-E
BIOMAT	Bioenergy Market Adjusting Tariff	29234-37, 28286-88, 26834, 29238-E
DIOW!/ (1	Bloomergy Market Adjusting Tarin	26836-38, 29239-40,28290-93,29241-E
ECR	Enhanced Community Renewables	28786, 28267, 28787, 28269, 28270-E
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GT	Green Tariff	28273, 28274, 28275, 28276, 28277-E
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EECC-TOU-A-P	Electric Commodity Cost – Time of Use Plus	29672, 29745, 29443, 26536-7, 29444-E 29746, 29849-E
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EECC-TBS	EECC – Transitional Bundled Service	22903, 22904, 16432, 19750-E
EECC-CPP-D	EECC Critical Peak Pricing Default	29749, 29750, 29451, 25514, 29452-E
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10C5		Issued by Date Filed	Nov 3, 2017

10C5Issued byDate FiledNov 3, 2017Advice Ltr. No.3142-EDan SkopecEffectiveNov 3, 2017Vice President<br/>Decision No.Regulatory AffairsResolution No.



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28859-E

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SAMPL	F F	RMS
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F NI .	Data	A see Historia A see a see a la Constant to	Cal. P.U.C.
Form No.	<u>Date</u>	Applications, Agreements and Contracts	Sheet No.
142-05216	04-06	Notice to Add, Change or Terminate Third Party Marketer for BIP	22976-E
142-05218	07-14	Demand Bidding Program Contract	25222-E
142-05218-N	07-14	Demand Bidding Program Day Ahead (Navy Only) Contract	26373-E
142-05300	10-06	Capacity Bidding Program Customer Contract	19664-E
142-05301	10-06	Aggregator Agreement for Capacity Bidding Program (CBP)	26161-E
142-05302	10-06	Notice to Add, Change, or Terminate Aggregator for Capacity Bidding	
	40.00	Program	26162-E
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		(3 <sup>rd</sup> Party Inadvertent Export)	
142-0543	06-17	Generating Facility Interconnection Agreement(3 <sup>rd</sup> Party Non-Exporting)	29059-E
142-0544	06-17	Generating Facility Interconnection Agreement	29060-E
142-0044	00-17	(Inadvertent Export)	23000-L
142-0545	06-06	Generating Facility Interconnection Agreement (Continuous Export)	19323-E
142-0546	05-10	Generation Bill Credit Transfer Allocation Request Form	21852-E
142-0600	06-13	Joint IOU Standard Form Re-Mat Power Purchase Agreement	23603-E
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	00-13		3542-E
143-359		Resident's Agreement for Water Heater Switch Credit	3342-⊏
143-00212		Service Agreement between the Customer and	11854-E
440.050		SDG&E for Optional UDC Meter Services	
143-359		Resident's Agreement for Water Heater Switch Credit	3542-E
143-459		Resident's Agreement for Air Conditioner or	2542 5
440 550		Water Heater Switch	3543-E
143-559		Owner's Agreement for Air Conditioner or	0544.5
440.050		Water Heater Switch Payment	3544-E
143-659	40.07	Owner's Agreement for Air Conditioner or Water Heater Switch	3545-E
143-759	12-97	Owner's Agreement for Air Conditioner Switch Payment	3699-E
143-859	1-99	Occupant's Agreement for Air Conditioner Switch Payment	3700-E
143-01212		Letter of Understanding between the Customer's	
		Authorized Meter Supplier and SDG&E for	44055 5
440 44500	40.07	Optional UDC Meter Services	11855-E
143-1459B	12-97	Thermal Energy Storage Agreement	5505-E
143-01759	12-97	Meter Data and Communications Request	11004-E
143-01859	2-99	Energy Service Provider Service Agreement	10572-E
143-01959	8-98	Request for the Hourly PX Rate Option Service Agreement	11005-E
143-01959/1	2-99	Request for the Hourly PX Rate Option (Spanish)	11888-E
143-02059	12-99	Direct Access Service Request (DASR)	13196-E
143-02159	12-97	Termination of Direct Access (English)	11889-E
143-02159/1	12-97	Termination of Direct Access (Spanish)	11890-E
143-2259	12-97	Departing Load Competition Transition Charge Agreement	10629-E
143-02359	12-97	Customer Request for SDG&E to Perform	
		Telecommunication Service	11007-E
143-02459	12-97	ESP Request for SDG&E to Perform ESP Meter Services	11008-E
143-02659	3-98	ESP Request to Receive Meter Installation/Maintenance Charges	11175-E
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143-02760	12-12	Six Month Notice to Return to Direct Access Service	23319-E
143-02761	01-12	Six Month Notice to Return to Bundled Portfolio Service	22730-E
143-02762 143-02763	02-13 04-10	Direct Access Customer Assignment Affidavit	23432-E 21709-E
143-02763	04-10	Motioe of intent to Translet to DA Duffing OEW	Z1/09-E
		(Oti	
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11C5 Date Filed Jun 30, 2017 Issued by Dan Skopec Advice Ltr. No. 3094-E Effective Jul 30, 2017 Vice President Regulatory Affairs Decision No. 14-12-035 Resolution No.



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144-0811	03-09	Capacity Reservation Election	21133-E
144-0812	08-13	Event Notification Form	23703-E
144-0813	08-13	Future Communications Contact Information Form	23704-E
144-0820	01-16	CISR-DRP	27106-E
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165-1001	06-09	Aggregator Agreement for Participating Load Pilot	21272-E
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165-1002	06-09	Notice to Add, Change or Terminate Aggregator for PLP	21273-E
165-1002/1	06-10	Notice to Add, Change or Terminate Aggregator for DRWMP	22049-E
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107 1000	04.45	Authorization to Release Customer Information	26941-E
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189-2000	11-14	Mobilehome Park Utility Upgrade Application	25559-E
190-1000	10-15	Bioenergy Market Adjusting Tariff Power Purchase Agreement	26846-E
190-2000	10-15	Green Tariff Shared Renewables (GTSR) Enhanced Community	
		Renewables (ECR) Program Project Development Tariff Rider and	00074 F
		Amendment	26874-E
195-1000	05-17	Station Power -Agreement for Energy Storage Devices	28966-E
200-1000	09/17	Declaration of Eligibility for Foodbank Discount	29285-E
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144-0813	03-09	Critical Peak Pricing - Future Communications Contact Information Form	21135-E
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101-363	04-98	Guarantor's Statement	20604-E
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103-1750-E	03-68	Return of Customer Deposit	2500-E
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100 010::	00 11	Residential Meter Re-Read Verification	24576-E
108-01214	03-14	Form of Bill - General, Domestic, Power, and Lighting Service -	24070-E
110-00432	11-16	Opening, Closing, and Regular Monthly Statements	20256 5
		Form of Bill - Past Due Format	28256-E
110-00432/2	07-16	LVIII VI DIII - FASLIDIE FUIIIAL	27837-E

(Continued)

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 Issued by
 Date Filed
 Oct 11, 2017

 Advice Ltr. No.
 3128-E
 Dan Skopec
 Effective
 Dec 1, 2017

 Vice President Decision No.
 17-08-030
 Regulatory Affairs
 Resolution No.



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101-00752	04-11	Final Notice Before Disconnect (delivered)	22324-E
101-00753	03-14	Back of Urgent Notice Applicable to Forms	0.4570 5
404 00750/4	04.44	101-00753/1 through 101-00753/11	24579-E
101-00753/1	04-11	Urgent Notice Payment Request Security Deposit to Establish Credit	22325-E
101-00753/2	03-05	Urgent Notice Payment Request Security Deposit to Re-Establish Credit.	18084-E
101-00753/3	04-11	Urgent Notice Payment Request for Past Due Security Deposit	22326-E
101-00753/4	04-11	Urgent Notice Payment Request for Past Due Bill	22327-E
101-00753/5	02-04	Urgent Notice Payment Request for Returned Payment	16948-E
101-00753/6	02-04	Urgent Notice Payment Request for Final Bill.	16949-E
101-00753/7	02-04	Urgent - Sign Up Notice for Service	16950-E
101-00753/8	02-04	Reminder Notice – Payment Request for Past Due Bill	16951-E
101-00753/9	02-04	Closing Bill Transfer Notification	16952-E
101-00753/10	03-14	Payment Agreement Confirmation	24580-E
101-00753/11	02-04	ESP Reminder Notice – Payment Request for Past Due Bill	16954-E
101-00754	03-14	Final Notice Before Disconnection (mailed), Notice of Past Due Closing	24581-E
101-01071	04-11	Bill, and Notice of Past Due Closing Bill Final Notice	22330-E
101-01072	08-14	Notice of Disconnect (delivered)	25420-E
101-01073	05-14	Notice of Shut-off (Mailed)	24851-E
101-02171	05-10	Notice to Landlord - Termination of Tenant's Gas/Electric Service	
		(two or more units)	21885-E
101-02172	03-14	Notice of Disconnect (MDTs)	24582-E
101-2452G	02-04	Notice to Tenants - Request for Termination of Gas and Electric	
		Service Customer Payment Notification	16959-E
		Operation Notices	
404 0074	44.05	N. A N. C	0000 =
101-2371	11-95	No Access Notice	8826-E
101-3052B	3-69	Temporary "After Hour" Turn On Notice	2512-E
101-15152B	3-69	Door Knob Meter Reading Card	2515-E
107-04212	4-99	Notice of Temporary Electric Service Interruption	12055 5
115-00363/2	9-00	(English & Spanish)	12055-E   13905-E
		Sorry We Missed You	
115-002363	9-00	Electric Meter Test	13906-E
115-7152A		Access Problem Notice	3694-E
124-70A		No Service Tag	2514-E

13C6		Issued by	Date Filed	Apr 28, 2015
Advice Ltr. No.	2734-E	Lee Schavrien	Effective	May 1, 2015
		Senior Vice President		-
Decision No.	D.14-05-016	Regulatory Affairs	Resolution No.	

Decision No. D.14-05-016

## **APPENDIX C**

# **Statement of Proposed Rate Increases**

### SAN DIEGO GAS & ELECTRIC 2018 RATE DESIGN WINDOW APPLICATION

### **RULE 3.2(A)(3) STATEMENT OF PROPOSED RATE CHANGES**

This application complies with CPUC's requirement that all three major gas and electric utilities in California (PG&E, Southern California Edison and San Diego Gas & Electric) propose a plan for transitioning to Time-of-Use rate plans. Additionally, this application will include several residential rate options designed to be more energy efficient and have less impact on the environment.

In 2015, the CPUC launched its residential rate reform efforts to address concerns about customer bill impacts and volatility caused by the five-tiered rate structure that was put into place after the California Energy Crisis. This 2018 RDW proceeding is the next step in the CPUC's process of residential electric rate reform for all of California's major utilities.

The State of California is taking steps to create a cleaner and more reliable energy grid by encouraging energy usage when demand is lower and renewable energy is more plentiful. Based on lessons learned from other customer classes (such as commercial and agricultural) being on Time-of-Use rate plans, the CPUC has determined that more residential customers should be moved to Time-of-Use rate plans. Time-of-Use rate plans can help bring down the overall cost of electricity, make better use of clean renewable energy such as solar, and support the needs of the electric grid. Customers will always have a choice of rate plans, meaning Time-of-Use is not mandatory. The first year will be risk-free, with bill protection, and an individualized rate comparison for all customers.

This application includes the following:

- Plan to transition many residential customers to a Time-of-Use rate plan, meaning the cost of electricity depends on the time of day it is used.
- Options of three core rate plans for customers to choose from, designed to meet a variety of customer needs.
- Future fixed monthly charge to reduce bill volatility and better align customer bills with cost of service. Implementing a fixed charge will decrease the price per kilowatt hour and helps reduce the impact of customer bill volatility.

The transition to Time-of-Use rate plans is being piloted statewide to gain important lessons before full transition. SDG&E's application proposes to start this transition on January 1, 2019, after all pilots are complete and lessons learned from pilot programs have been reflected in implementation plans.

<sup>&</sup>lt;sup>1</sup> Cal. Pub. Util. Code Section 745 (b).

<sup>&</sup>lt;sup>2</sup> Cal. Pub. Util. Code Section 745 (c)(4).

### **IMPACT ON RATES**

There is no direct request to increase rates in this application. However, the proposed implementation plan will eventually impact rates as rate design changes are implemented. Specific impacts to rates have not been determined at this time. Requests to increase rates will be made in future rate increase applications and information about rate impacts will be provided at that time. This application is intended to give customers more control over their bill amounts. The majority of customers will either see a reduction in their total bill amount or see a small annual increase, depending on how much energy they are able to shift to off-peak hours when prices are lower.

## **APPENDIX D**

## **Original Cost and Depreciation**

### SAN DIEGO GAS & ELECTRIC COMPANY

## COST OF PROPERTY AND DEPRECIATION RESERVE APPLICABLE THERETO AS OF JUNE 30, 2017

No.	<u>Account</u>	Original Cost	Reserve for Depreciation and <u>Amortization</u>
ELECT	RIC DEPARTMENT		
302 303	Franchises and Consents Misc. Intangible Plant	222,841.36 156,628,784.90	202,900.30 94,800,672.81
	TOTAL INTANGIBLE PLANT	156,851,626.26	95,003,573.11
310.1 310.2 311 312 314 315 316	Land Land Rights Structures and Improvements Boiler Plant Equipment Turbogenerator Units Accessory Electric Equipment Miscellaneous Power Plant Equipment Steam Production Decommissioning	14,526,518.29 0.00 96,334,558.86 169,331,217.70 138,276,524.45 85,742,414.73 47,957,663.34 0.00	46,518.29 0.00 44,862,417.28 75,963,449.80 52,081,765.18 37,651,783.18 12,032,960.20 0.00
	TOTAL STEAM PRODUCTION	552,168,897.37	222,638,893.93
320.1 320.2 321 322 323 324 325 101	Land Land Rights Structures and Improvements Boiler Plant Equipment Turbogenerator Units Accessory Electric Equipment Miscellaneous Power Plant Equipment SONGS PLANT CLOSURE GROSS PLANT-	0.00 0.00 27,285,711.08 243,225,717.06 26,982,364.66 10,878,214.63 166,754,468.81 (475,126,476.33)	0.00 0.00 2,658,162.87 21,662,290.99 2,370,893.39 1,458,232.53 48,807,803.51 (76,957,383.29)
	TOTAL NUCLEAR PRODUCTION	(0.09)	0.00
340.1 340.2 341 342 343 344 345 346	Land Land Rights Structures and Improvements Fuel Holders, Producers & Accessories Prime Movers Generators Accessory Electric Equipment Miscellaneous Power Plant Equipment	224,368.91 56,032.61 22,998,121.16 21,324,500.79 94,574,417.87 362,782,673.34 32,510,919.85 26,443,313.62	0.00 10,212.85 7,679,414.56 7,007,859.59 36,327,625.63 140,496,193.64 13,289,015.40 13,771,538.14
	TOTAL OTHER PRODUCTION	560,914,348.15	218,581,859.81
	TOTAL ELECTRIC PRODUCTION	1,113,083,245.43	441,220,753.74

		Original	Reserve for Depreciation and
No.	Account	Cost	<u>Amortization</u>
350.1	Land	72,524,698.96	0.00
350.2	Land Rights	160,619,278.55	21,371,427.72
352	Structures and Improvements	488,608,585.04	68,304,700.17
353	Station Equipment	1,510,349,481.65	291,715,644.87
354	Towers and Fixtures	895,095,669.89	166,170,633.30
355	Poles and Fixtures	471,267,279.29	101,037,242.10
356	Overhead Conductors and Devices	579,975,944.07	228,020,077.14
357	Underground Conduit	357,850,703.14	57,184,149.68
358	Underground Conductors and Devices	375,148,181.36	56,371,465.21
359	Roads and Trails	310,745,361.46	30,776,041.82
101	SONGS PLANT CLOSURE GROSS PLANT-	0.00	0.00
	TOTAL TRANSMISSION	5,222,185,183.41	1,020,951,382.01
360.1	Land	16,176,227.80	0.00
360.2	Land Rights	85,981,546.92	41,657,301.79
361	Structures and Improvements	4,650,797.97	1,797,870.83
362	Station Equipment	502,258,710.13	176,956,070.89
363	Storage Battery Equipment	114,543,154.82	11,035,235.80
364	Poles, Towers and Fixtures	689,774,048.87	270,474,444.15
365	Overhead Conductors and Devices	643,306,044.00	208,629,931.03
366	Underground Conduit	1,195,423,500.04	475,715,123.40
367	Underground Conductors and Devices	1,502,679,315.60	901,240,612.16
368.1	Line Transformers	609,320,047.17	150,126,700.43
368.2	Protective Devices and Capacitors	35,444,236.93	5,627,535.11
369.1	Services Overhead	153,915,548.66	119,842,009.73
369.2	Services Underground	346,628,155.70	245,380,312.12
370.1	Meters	191,398,908.77	83,779,656.60
370.2	Meter Installations	56,021,946.63	21,923,796.19
371	Installations on Customers' Premises	8,963,349.06	10,328,326.53
373.1	St. Lighting & Signal SysTransformers	0.00	0.00
373.2	Street Lighting & Signal Systems	29,842,566.03	18,963,966.64
	TOTAL DISTRIBUTION PLANT	6,186,328,105.10	2,743,478,893.40
389.1	Land	7,312,142.54	0.00
389.2	Land Rights	0.00	0.00
390	Structures and Improvements	34,826,629.88	24,572,335.14
392.1	Transportation Equipment - Autos	0.00	49,884.21
392.2	Transportation Equipment - Trailers	58,145.67	14,831.41
393	Stores Equipment Portable Tools	8,545.97	8,372.62
394.1 394.2		26,342,331.91	9,121,753.55
	Shop Equipment	341,135.67	259,010.20
395 306	Laboratory Equipment	5,152,106.01	589,188.43
396 397	Power Operated Equipment	60,528.93 277,874,435.92	117,501.67
397 398	Communication Equipment		110,051,000.90
390	Miscellaneous Equipment	6,863,576.90	1,180,137.60
	TOTAL GENERAL PLANT	358,839,579.40	145,964,015.73
101	TOTAL ELECTRIC PLANT	13,037,287,739.60	4,446,618,617.99

No.	<u>Account</u>	Original Cost	Reserve for Depreciation and Amortization
GAS PI	, <del></del>		
OAO I I			
302 303	Franchises and Consents Miscellaneous Intangible Plant	86,104.20 0.00	86,104.20 0.00
	TOTAL INTANGIBLE PLANT	86,104.20	86,104.20
360.1	Land	0.00	0.00
361	Structures and Improvements	0.00	0.00
362.1	Gas Holders	0.00	0.00
362.2	Liquefied Natural Gas Holders	0.00	0.00
363	Purification Equipment	0.00	0.00
363.1	Liquefaction Equipment	0.00	0.00
363.2	Vaporizing Equipment	0.00	0.00
363.3	Compressor Equipment	0.00	0.00
363.4	Measuring and Regulating Equipment	0.00	0.00
363.5 363.6	Other Equipment LNG Distribution Storage Equipment	0.00 2,242,164.87	0.00 1,129,198.45
	TOTAL STORAGE PLANT	2,242,164.87	1,129,198.45
365.1	Land	4,649,143.75	0.00
365.2	Land Rights	2,232,291.80	1,408,195.74
366	Structures and Improvements	19,284,359.93	10,217,949.22
367	Mains	233,085,256.00	78,458,425.07
368	Compressor Station Equipment	90,673,807.33	69,389,421.99
369	Measuring and Regulating Equipment	23,190,739.00	16,900,829.84
371	Other Equipment	1,611,054.80	15,869.43
	TOTAL TRANSMISSION PLANT	374,726,652.61	176,390,691.29
374.1	Land	1,083,616.95	0.00
374.2	Land Rights	8,331,367.27	6,986,721.45
375	Structures and Improvements	43,446.91	61,253.10
376	Mains	1,025,192,779.17	377,126,261.81
378	Measuring & Regulating Station Equipment	18,068,909.71	8,243,192.81
380	Distribution Services	274,810,914.16	296,901,174.40
381 382	Meters and Regulators	157,350,344.06	57,747,725.22
382 385	Meter and Regulator Installations Ind. Measuring & Regulating Station Equipme	102,672,813.04 1,516,810.70	40,996,390.21 1,215,753.05
386	Other Property On Customers' Premises	0.00	0.00
387	Other Equipment	9,870,474.80	4,973,947.02
	TOTAL DISTRIBUTION PLANT	1,598,941,476.77	794,252,419.07

No.	<u>Account</u>	Original Cost	Reserve for Depreciation and <u>Amortization</u>
392.1	Transportation Equipment - Autos	0.00	25,503.00
392.2	Transportation Equipment - Trailers	44,627.10	44,627.23
394.1	Portable Tools	10,602,158.47	4,271,614.92
394.2	Shop Equipment	76,864.06	53,082.43
395	Laboratory Equipment	283,093.66	275,636.66
396	Power Operated Equipment	16,162.40	9,556.29
397	Communication Equipment	2,705,551.88	1,178,868.93
398	Miscellaneous Equipment	473,379.95	85,252.34
	TOTAL GENERAL PLANT	14,201,837.52	5,944,141.80
101	TOTAL GAS PLANT	1,990,198,235.97	977,802,554.81
СОММ	ON PLANT		
303	Miscellaneous Intangible Plant	411,631,992.20	276,570,546.85
350.1	Land	0.00	0.00
360.1	Land	0.00	0.00
389.1	Land	7,168,914.56	0.00
389.2	Land Rights	857,384.59	27,776.34
390	Structures and Improvements	389,278,337.16	153,210,933.62
391.1	Office Furniture and Equipment - Other	38,312,019.80	15,961,577.19
391.2	Office Furniture and Equipment - Computer E	52,514,351.92	34,696,791.01
392.1	Transportation Equipment - Autos	406,418.22	(285,191.36)
392.2	Transportation Equipment - Trailers	12,195.98	5,418.78
393	Stores Equipment	380,636.01	47,513.07
394.1	Portable Tools	1,454,417.13	396,222.44
394.2	Shop Equipment	191,385.80	135,484.56
394.3	Garage Equipment	1,626,443.82	284,576.94
395	Laboratory Equipment	2,095,455.34	1,031,661.54
396	Power Operated Equipment	0.00	(192,979.10)
397	Communication Equipment	188,431,411.62	82,628,661.10
398	Miscellaneous Equipment	2,464,827.17	548,065.59
118.1	TOTAL COMMON PLANT	1,096,826,191.32	565,067,058.57
	TOTAL ELECTRIC PLANT	13,037,287,739.60	4,446,618,617.99
	TOTAL GAS PLANT	1,990,198,235.97	977,802,554.81
	TOTAL COMMON PLANT	1,096,826,191.32	565,067,058.57
101 & 118.1	TOTAL _	16,124,312,166.89	5,989,488,231.37
101	PLANT IN SERV-SONGS FULLY RECOVER_	0.00	0.00
101	PLANT IN SERV-ELECTRIC NON-RECON		
	Electric	0.00	0.00
	Gas	0.00	0.00
	Common _	(7,887,821.95)	(2,272,753.20)
		(7,887,821.95)	(2,272,753.20)

No.	<u>Account</u>	Original <u>Cost</u>	Reserve for Depreciation and <u>Amortization</u>
101	PLANT IN SERV-ASSETS HELD FOR SALE		
101	Electric	0.00	0.00
	Common	0.00	0.00
		0.00	0.00
101	PLANT IN SERV-LEGACY METER RECLASS Electic	0.00	0.00
101	PLANT IN SERV-PP TO SAP OUT OF BAL Electic	0.00	0.00
118	PLANT IN SERV-COMMON NON-RECON Common - Transferred Asset Adjustment	(1,627,745.96)	(1,627,745.96)
101	Accrual for Retirements		
101	Electric	(5,196,343.24)	(5,196,343.24)
	Gas	(175,218.45)	(175,218.45)
	TOTAL PLANT IN SERV-ACCRUAL FOR RE_	(5,371,561.69)	(5,371,561.69)
102	Electric	0.00	0.00
	Gas	0.00	0.00
	TOTAL PLANT PURCHASED OR SOLD	0.00	0.00
104	Electric	85,194,000.02	15,679,524.03
	Gas	0.00	0.00
	TOTAL PLANT LEASED TO OTHERS	85,194,000.02	15,679,524.03
105	Plant Held for Future Use		
	Electric	5,302,629.50	0.00
	Gas	0.00	0.00
	TOTAL PLANT HELD FOR FUTURE USE	5,302,629.50	0.00
107	Construction Work in Progress Electric Gas Common	1,080,338,361.09 129,495,039.49 139,684,928.07	
	TOTAL CONSTRUCTION WORK IN PROGRESS	1,349,518,328.65	0.00
108	Accum. Depr SONGS Mitigation/Spent Fuel Dis	sallowance 0.00	0.00

No.	Account	Original Cost	Reserve for Depreciation and Amortization
108.5	Accumulated Nuclear Decommissioning Electric	0.00	1,027,607,504.49
	TOTAL ACCUMULATED NUCLEAR		
	DECOMMISSIONING	0.00	1,027,607,504.49
101.1	ELECTRIC CAPITAL LEASES	1,352,823,281.00	242,820,238.00
118.1	COMMON CAPITAL LEASE	21,349,549.44	20,646,165.53
		1,374,172,830.44	263,466,403.53
120	NUCLEAR FUEL FABRICATION	62,963,775.37	40,861,208.00
120	SONGS PLANT CLOSURE-NUCLEAR FUEL	(62,963,775.37)	(40,861,208.00)
143	FAS 143 ASSETS - Legal Obligation	17,240,858.67	(1,023,385,718.05)
143	SONGS Plant Closure - FAS 143 contra	0.00	0.00
	FIN 47 ASSETS - Non-Legal Obligation	84,742,931.67	35,884,951.13
143	FAS 143 ASSETS - Legal Obligation	0.00	(1,522,144,031.35)
	TOTAL FAS 143	101,983,790.34	(2,509,644,798.27)
	UTILITY PLANT TOTAL	19,025,596,616.24	4,777,324,804.30

## **APPENDIX E**

**Summary of Earnings** 

### SAN DIEGO GAS & ELECTRIC COMPANY SUMMARY OF EARNINGS Six Months Ended June 30, 2017 (\$ IN MILLIONS)

Line No.	<u>Item</u>	<u>Ar</u>	<u>Amount</u>	
1	Operating Revenue	\$	2,299	
2	Operating Expenses		1,935	
3	Net Operating Income	\$	364	
4	Weighted Average Rate Base	\$	8,232	
5	Rate of Return*		7.79%	
	*Authorized Cost of Capital			

## **APPENDIX F**

## Service List Notice to State, Cities, and Counties

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 Department of U.S. Administration General Services Administration 300 N. Los Angeles St. #3108 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 La Mesa Attn. City Clerk 8130 Allison Avenue La Mesa, CA 91941

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

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

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

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

City of San Diego Attn. Mayor 202 C Street, 11<sup>th</sup> Floor 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, 2<sup>nd</sup> Floor San Diego, CA 92101

City of Santee Attn. City Clerk 10601 Magnolia Avenue Santee, CA 92071 City of Lakeside Attn. City Clerk 9924 Vine Street Lakeside CA 92040

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

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

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

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

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

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

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

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

City of Santee Attn. City Attorney 10601 Magnolia Avenue Santee, CA 92071 City of La Mesa Attn. City Attorney 8130 Allison Avenue La Mesa, CA 91941

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

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

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

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

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

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

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

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

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

City of Vista Attn. City Clerk 200 Civic Center Drive Vista, CA 92084 Valley Center Chamber of Commerce Attn. City Clerk P.O. Box 8 Valley Center, CA 92082

City of Aliso Viejo 12 Journey Aliso Viejo, CA 92656 City of Vista Attn. City Attorney 200 Civic Center Drive, Bldg. K Vista, CA 92084