

**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

**MONTHLY REPORT OF SAN DIEGO GAS & ELECTRIC COMPANY (U 902 M) ON
LOW-INCOME ASSISTANCE PROGRAMS FOR OCTOBER 2018**

EDWARD L. HSU
JOHNNY Q. TRAN

Attorneys for:

SAN DIEGO GAS & ELECTRIC COMPANY
555 West 5th Street, GT14E7
Los Angeles CA 90013
Telephone: (213) 244-8197
Facsimile: (213) 629-9620
E-Mail: ehsu2@semprautilities.com

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San Diego Gas & Electric Company

Energy Savings Assistance Program (ESA)

Program

And

California Alternate Rates for Energy (CARE)

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ENERGY SAVINGS ASSISTANCE PROGRAM MONTHLY REPORT

1. ESA PROGRAM EXECUTIVE SUMMARY

1.1 ESA Program Overview

1.1.1 Provide a summary of the ESA Program elements as approved in Decision (D.) 16-11-022.

ESA Program Summary through September 2018			
	2018 Authorized / Planning Assumptions	Actual to Date¹	%
Budget ²	\$34,839,223	\$17,939,275	51%
Homes Treated ³	21,332	13,595	64%
kWh Saved	6,866,075	3,446,138	50%
kW Demand Reduced	2,148	1,435	67%
Therms Saved	292,308	132,072	45%
GHG Emissions Reduced (Tons)	5,486	2,668	49%

1.2 ESA Program Customer Outreach and Enrollment Update

1.2.1 Provide a summary of the ESA Program outreach and enrollment strategies deployed this month.

Below is a summary of ESA Program specific efforts conducted in October. Joint CARE and ESA Programs marketing, education and outreach efforts are provided in section 1.2.2 below.

¹ Energy, demand, emissions savings reflects total savings from program including CSD leveraging and multifamily common area measure installations. Through October, there has been no measure installations for CSD leveraging or multifamily common area.

² Budget authorized in CPUC Resolution E-4884 which reflects program budget including unspent funds.

³ Includes total homes treated including CSD leveraging. Multifamily common area properties will be tracked separately once implemented.

ESA Program Contractor Outreach

SDG&E's Outreach and Assessment (O&A) Contractors canvas targeted neighborhoods to enroll customers in the ESA Program. In October, door-to-door canvassing from SDG&E's largest O&A contractor resulted in 1,529 ESA Program leads and 1,094 enrollments. Overall, ESA Program marketing, education and outreach efforts were successful in creating 5,250 leads and 1,480 enrollments for the month of October.

Single-Family Affordable Solar Housing (SASH) Program

SDG&E works with GRID Alternatives to enroll customers in the ESA Program based on participation in the SASH Program. Once approved, contractors install all feasible ESA Program measures in the home prior to the SASH Program's installation of a solar system. The ESA Program did not receive any leads from the SASH Program during the month of October.

Additionally, D.16-11-022 required the utilities to provide GRID Alternatives with information on CARE high usage (HEU) customers who have participated in the ESA program. In June, SDG&E implemented a new system for the ESA program which caused delays in providing GRID with the list of CARE HEU customers receiving ESA. SDG&E notified GRID of the delay and initially anticipated providing a list of customers who participated in June through August in September. SDG&E continues to work on resolving the issue and expects a resolution soon.

ESA Program Multifamily Common Area Measure (CAM) Initiative

On May 30, 2018, SDG&E received approval of its ESA CAM Implementation Plan. Since the approval, SDG&E has been conducting outreach efforts utilizing SDG&E's multifamily Single Point of Contact (SPOC) and working to contract with a third party for the implementation of the program. In September, SDG&E finalized the contract with Willdan Energy, who will support ESA CAM implementation and act as a SPOC for eligible multifamily properties. SDG&E is working with Willdan Energy to establish processes and procedures for ESA Program multifamily CAM.

In October, SDG&E and Willdan Energy partnered to begin developing targeting marketing list for ESA MF CAM, which included list of re-syndication projects in SDG&E's service territory and deed restricted properties previously participating in the ESA Program, where many of the units were eligible and treated by the program. Additionally, SDG&E, Willdan and the program implementor for the Solar on Multifamily Affordable Housing Program began discussions on program leveraging activities which can help boost enrollments and provide more comprehensive solutions to multifamily properties. The discussions were also helpful in identifying opportunities for streamlining enrollment and eligibility processes. Ongoing monthly touchpoints have been scheduled for continued coordination.

Language Line

Language Line® is utilized to assist customers with limited English proficiency (LEP) to have a channel in which to communicate with ESA Program contractors in the language of their preference. In October, 2 customers were served by the Language Line.

Language	Calls
Arabic	1
Vietnamese	1
TOTAL	2

1.2.2 Customer Assistance Marketing, Education and Outreach for the CARE and ESA Programs.

Marketing, Education and Outreach activities summarized below represent joint efforts on behalf of the CARE and ESA Programs. SDG&E utilizes an integrated marketing, education and outreach strategy by connecting with customers using general awareness marketing, direct marketing, and community outreach and engagement. The 2018 campaign's intent is to make an emotional connection with customers giving them one less thing to worry about and providing monthly savings on their energy bill. The campaign--running in English, Spanish and Asian languages-- includes TV, newspaper, digital (including paid search), email, direct mail and bill inserts, as well as a robust outreach program.

General Awareness Marketing

General awareness marketing allows SDG&E to connect with its customers through mass media efforts reaching both mass audiences and hard-to-reach populations including customers in rural areas, seniors, customers with special needs and

multilingual/multicultural customers. The tactics for October are summarized in the following sections:

Print Advertising:

SDG&E is running in-language print advertising in Chinese, Vietnamese, Tagalog (Filipino) and Spanish language publications. English print is also running in African American publications, as well as rural community newspapers. The 2018 print campaign will continue running through December.

Online Advertising:

SDG&E continued its 2018 digital advertising campaign consisting of online banner and paid search advertising. For the month of October, SDG&E did a paid search (or search engine marketing) campaign, which is a more targeted type of online advertising as customers are specifically searching for related information. The paid search advertising garnered 100,259 impressions with 24,096 customers clicking through to the CARE/ESA Programs online enrollment process. SDG&E also used display advertising (advertising on websites or apps through banners or other ad formats) which is used for general awareness and farther reach. The display advertising garnered over 2.5 million impressions with 10,921 customers clicking through to the online application.

Social Media:

Using Facebook and Twitter channels, 4 CARE and ESA Program messages were sent by SDG&E to an audience of more than 34,000 followers. These followers

are then able to redistribute the messages to their own networks on social media. Partner agencies as well as individuals also distributed these messages to their followers.

Direct Marketing

SDG&E continues its direct marketing campaign which allows SDG&E to connect with individual customers through targeted tactics including direct mail, e-mail, live calls, and outbound calling.

Each month, direct marketing efforts are focused on a particular segment of the population. For the month of October, SDG&E primarily targeted zip codes using its propensity model which considers a variety of factors to help identify customers that are more likely to qualify for CARE and ESA Programs.

In October, direct marketing efforts included the following tactics:

Live CARE Call Campaign:

SDG&E's third-party contractor, The Harris Group (THG), called targeted customers to enroll in the CARE Program and to promote the ESA Program.⁴

The campaign provides SDG&E with a way to directly connect with customers in the low-income and hard-to-reach areas. The Harris Group provides education about the CARE and ESA Programs and assist customers in completing program application forms. Outbound call activities in October generated 1,515 CARE Program enrollments, 127 CARE Program recertifications and 203 ESA Program leads.

Email:

SDG&E sent 11,700 ESA Program promotional emails to enrolled CARE customers that are potentially eligible for the ESA Program, to introduce the customers to the program and encourage them to apply for the ESA Program online. SDG&E adjusted the creative materials for this campaign by having the email link directly to an ESA outreach contractor – customers who clicked through would be connected by telephone and/or online calling to a contractor.

This adjustment was made to help streamline the qualified lead process. Over the

⁴ THG is a Diverse Business Enterprise (DBE) vendor and a woman-owned business.

course of the month, there was an average open rate of 34% and a 3.6% click through rate⁵

Direct Mail

SDG&E sent an ESA Program promotional postcard to 1,208 recently enrolled CARE customers to inform them that they may qualify for the ESA Program.

The postcard encourages CARE customers to contact an authorized ESA Program outreach contractor for more information and/or to schedule an appointment.

Community Outreach & Engagement

Energy Solutions Partner Network:

SDG&E works closely with a network of over 250 community-based organizations (CBOs) to connect customers to the CARE and ESA Programs. These organizations represent the diversity of SDG&E's customers within its service area. A majority of these organizations are small, grassroots agencies serving customers that are multicultural/multilingual, seniors, veterans, special needs, and limited English proficient (LEP) audiences. These partners help educate and enroll customers in low-income programs utilizing a variety of tactics including: messaging through e-mail and social media channels such as Facebook,

⁵ Per the 2018 IBM Watson Marketing Cloud Benchmark Study, 2018 baseline averages for email metrics for the utility segment are: 28.4% Open Rate (recipients who open an email) and 3.2% Click Through Rate (recipients who click through to the offer).

Twitter, and Instagram, posting information on their websites, providing booth space at events, and hosting enrollment day fairs at their locations. In October, partner outreach activities resulted in 29 ESA Program leads and 2 CARE Program enrollments and 19 CARE Program recertifications.

Partner Spotlight:

In October, the SDG&E Customer Solutions Outreach Team participated in 59 events, presentations and trainings/workshops that featured information and enrollment in energy solutions programs, services and tools. Outreach activities were focused around engaging customers with solutions such as the CARE and ESA Programs.

In October, SDG&E's Outreach team along with five San Ysidro Health Center WIC offices participated in a CARE enrollment campaign. The five WIC offices generated 15 CARE Program enrollments and 17 CARE Program recertifications. These WIC offices are very active and excellent with enrolling customers in CARE. The office with the highest enrollments was recognized.



Multicultural Outreach:

To continue efforts to reduce potential barriers for customers in the rural, multicultural/multilingual and special needs customer segments, as well as to increase education and program enrollments, SDG&E employs multicultural contractors with employees that are fluent in various languages to help at staff events and presentations. These contractors provide staff that are fluent in the following languages: Spanish, Vietnamese, Chinese, Tagalog, Aramaic/Arabic, American Sign Language, and other languages as requested. During October, SDG&E completed 11 outreach activities. A summary of these activities is listed below:

Date	Address	Partner	Event Title
10/5/2018	1391 3rd Ave. Chula Vista, CA 91911	Episcopal Community Services	ECS Resource Fair
10/10/2018	4060 Fairmount Ave. San Diego, CA 92105	La Maestra	Binational Health Month
10/11/2018	Grocery Outlet 444 E San Ysidro Blvd, San Diego, CA 92173	San Ysidro Health	National Latino AIDS Awareness Day
10/13/2018	Jacob Center	Deaf Community	Deaf Festival

Date	Address	Partner	Event Title
	404 Euclid Ave. San Diego, CA 92114	Services	
10/13/2018	Memorial Park in Chula Vista 373 Parkway Chula Vista, CA 91910	Kalusugan	Vim & Vigor Art and Wellness Festival
10/19/2018	200 E Main St. El Cajon, CA 92020	City of El Cajon Recreation Department	HauntFest
10/20/2018	600 Christmas Circle Dr. Borrego Springs, CA 92004	Borrego Chamber	Borrego Days
10/20/2018	Harborside Elementary School 681 Naples St. Chula Vista, CA 91911	HHSA	Grandparents Raising Grandchildren
10/27/2018	Town & Country 500 Hotel Circle N San Diego, CA 92108	San Diego Union Tribune	Successful Aging Expo
10/27/2018	Fallbrook Community Center 341 Heald Ln Fallbrook, CA 92028	Fallbrook Community Center	Halloween Festival
10/30/2018	Walmart #5338 4840 Shawline Street San Diego, CA 92123	San Diego Fire Rescue Foundation	Halloween Safety Fair

Other Customer Engagement Efforts

SDG&E has several other customer engagement efforts to educate, enroll, and provide direct service to its customers. These efforts include direct service from SDG&E's Customer Contact Center and Payment Offices, as well as the distribution of materials through other SDG&E customer-facing groups/programs and field services teams.

SDG&E Customer Contact Center (CCC), Branch Offices and Payment Offices

SDG&E's CCC, Branch Offices and Payment Offices promote and offer the CARE and ESA Programs to potentially-eligible customers. SDG&E also promotes these customer assistance solutions at its Authorized Payment Locations (APLs). Additionally, customer engagement events called Customer Solutions Tailgates are held at the Branch Office locations on a quarterly basis to help enroll customers.

In D.16-06-054,⁶ SDG&E received Commission authorization for its CCC's Energy Service Specialists (ESSs) to enroll customers directly into the CARE Program over the telephone.

In October, SDG&E's CCC generated 87 CARE Program enrollments and 24 ESA Program leads. The Branch Offices generated 312 CARE Program enrollments and 76 ESA Program leads.

1.3 Leveraging Success Evaluation, Including CSD

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

SDG&E has been working closely with local Low-Income Home Energy Assistance Program (LIHEAP) agencies to improve leveraging opportunities between CSD's LIHEAP and the ESA Program. In July of 2017, SDG&E signed contracts with two local agencies offering Outreach and Assessments services. Previously, these organizations only contracted for the installation of weatherization measures. The agencies are leveraging LIHEAP payment assistance customers as the leads for ESA Program treatment and retreatment efforts.

Over the course of 2017 and continuing into 2018, SDG&E worked with CSD to finalize Non-Disclosure Agreements to provide customer usage information for customers treated by CSD⁷. In December 2017, SDG&E received the first data request from CSD for usage data. SDG&E compiled the data and submitted it to CSD on January 30, 2018. The data sharing activity frequency will be bi-annual and will be submitted by CSD. SDG&E is currently in discussion with CSD on developing an application-programming interface (API), which would automate the data exchange process between SDG&E and CSD and allow for greater frequency of the data exchange. A cost benefit analysis will need to be conducted to determine the feasibility of the API. CSD and the utilities continue to work towards developing processes for sharing weatherization data and on leveraging ESA Program funds for the installation of Low-Income Weatherization Program (LIWP) measures.⁸

As a result of the drought emergency that impacted California in 2015-2016, SDG&E collaborated with the San Diego County Water Authority (SDCWA) to distribute SDCWA's supplemental water conservation educational materials

⁶ Decision Addressing the General Rate Cases of San Diego Gas & Electric Company and Southern California Gas Company and the Proposed Settlements, dated July 1, 2016.

⁷ D.17-12-009, OP 140.

⁸ Measures installed through LIWP effort will be reflected in the monthly reporting tables, Table 2A. Through October, no activity has occurred.

entitled “Save Every Way, Every Day” with its education packet to all ESA Program enrollees.

In June 2018, the SDCWA and SDG&E entered into an agreement to implement a residential low-income water-energy collaboration. This effort will allow SDCWA to augment ESA Program funding for certain measures that save both energy and water, thereby expanding the number of customers served and the amount of energy and water saved. Additionally, SDG&E and SDCWA will leverage outreach opportunities to raise awareness of their respective programs. SDCWA will promote the ESA Program as part of their customer education efforts, while SDG&E will continue to include SDCWA water saving educational materials as part of the In-Home Education process under the ESA Program. This collaboration will continue through December 31, 2020. SDG&E will work with other water agencies within its service territory to explore other opportunities for leveraging.

In September, SDG&E also entered into an agreement with Moulten Nigel Water District (MNWD) in an effort to leverage installation of water saving measures. Efforts with MNWD will be similar to those identified with SDCWA.

In October, SDG&E began working with MNWD to develop education collateral materials to be included in SDG&E’s ESA Program In-Home Education workbook.

1.4 Workforce Education & Training (WE&T)

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

The ESA Program continues to identify opportunities to coordinated with the WE&T department to provide a training for ESA Program contractors. SDG&E plans on offering a second training class on Natural Gas Appliance Testing (NGAT) by the end of 2018 for those contractors that were unable to attend the original training.

1.5 Miscellaneous

1.5.1 ESA Program Studies

The current Low-Income Needs Assessment (LINA) must be completed by December 31, 2019, according to legislative mandate. A competitive solicitation for a consultant to conduct the statewide study was completed in January 2018. Research Into Action was selected as the winning bidder. A project initiation meeting with the consultant and the study team took place on February 14, 2018. The draft research plan was presented in a public webinar on May 29th. The final research plan was completed in June, and the study is now in the data collection phase.

The current Impact Evaluation Study for the ESA Program has been underway since January 2017. Phase 1 results were delivered on March 31, 2018 and revised on June 6, 2018. Energy Division directed the IOUs to use the Phase 1 results for the midcycle filing. The study will continue with additional data analysis in Phase 2 after which a public workshop to present the results will be scheduled and a final report will be provided in 2019.

A competitive solicitation for the Non-Energy Benefits Study was initiated in March 2018. The work scope was approved by the statewide study team and the ESA Cost Effectiveness Working Group. The study objectives are to update the non-energy benefit values used in ESA cost effectiveness analyses and to provide a workbook with the calculations. Skumatz Economic Research Associates (SERA) was selected to conduct the study, and the kickoff meeting was held on August 24th. The Study Team met biweekly during September and October to discuss status on the research and to plan a webinar to present the draft research plan. The webinar took place on October 12th. Study results are due in Q1 2019 and another webinar will be scheduled during that time to present the results and the draft report.

1.5.2 ESA Program Pilot

On May 3, 2018, SDG&E received approval of Advice Letter 3197-E/2655-G (AL) for the Programmable Communicating Thermostat (PCT or smart thermostat) Time-of-Use (TOU) Pilot, ordered in D.17-12-009. The goal of the

pilot is to explore and evaluate whether a PCT paired with a mobile application impacts the behavior of high usage customers as they transition to TOU. The Pilot will have a Treatment Group, which will receive a smart thermostat and transition to TOU, and a control group, which will transition to TOU but will not receive the thermostat. All customers will receive three surveys and will be compensated for their participation in the pilot.

SDG&E has begun recruitment efforts, which included email campaigns and direct mail to CARE and FERA customers with higher energy use. Customers responding to the campaigns are receiving a follow-up call to confirm their interest and to enroll them in the Pilot. Initial recruitment efforts have not yielded the results SDG&E anticipated, therefore SDG&E continued recruitment efforts through part of October. Additionally, the contract for the statewide pilot evaluator was executed in late September. SDG&E is currently working on a non-disclosure agreement and cybersecurity review for the evaluator, which is anticipated to delay the initial data delivery date. Based on this, Pacific Gas and Electric Company, Southern California Edison Company, and SDG&E submitted an extension of time to commence implementation from October 31, 2018 to

January 1, 2019.⁹ The Executive Director approved the IOUs extension request. SDG&E continues to work towards implementing a successful pilot.

2. CARE EXECUTIVE SUMMARY

2.1 CARE Program Summary

2.1.1 Please provide CARE Program summary costs.

CARE Budget Categories	Authorized Budget ¹⁰	Actual Expenses to Date	% of Budget Spent
Outreach	3,327,551	1,780,502	54%
Proc., Certification and Verification	507,020	492,101	97%
Post Enrollment Verification	356,501	210,912	59%
Information Tech./Programming	1,661,365	928,360	56%
Pilots-CHANGES	262,500	198,427	76%
Regulatory Compliance	247,184	270,855	110%
General Administration	819,769	501,521	61%
CPUC Energy Division Staff	56,712	34,395	61%
Cooling Centers	43,069	24,850	58%
Total Expenses	7,281,672	4,441,923	61%
Subsidies and Benefits	73,102,151	108,408,800	148%
Total Program Costs and Discounts	80,383,823	112,850,723	140%

⁹ Extension requested submitted to Commission Executive Director on October 23, 2018.

¹⁰ Reflects the authorized funding per year in D.17-12-009 and updated via Resolution E-4884 addressing conforming Advice Letter 3065-E/2568-G and 3065-E-A/2568-G-A.

2.1.2 Provide the CARE Program penetration rate to date.

CARE Penetration		
Participants Enrolled	Eligible Participants¹¹	Penetration rate
284,884	321,323	89%

2.2 Outreach

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

In October 2018, marketing and outreach efforts generated 14,947 completed CARE applications, and 5,128 new enrollments and recertifications for the program. Below is a summary of CARE specific outreach efforts. A summary of SDG&E's joint CARE and ESA Program marketing, education and outreach efforts are provided in section 1.2.2.

Direct Marketing

Direct Mail

For October 2018, SDG&E continued its rate comparison campaign by mailing a comparison letter to 14,857 potential CARE customers. The letter compares a customer's yearly total 2017 bill cost to what it would have been had they been enrolled in CARE receiving an average discount of 30%. Customers are encouraged to call SDG&E's toll-free enrollment number or to apply through SDG&E's online application.

The letter contributed to 170 CARE automated phone enrollments and 2,077 online enrollments.

Email

For the month of October 2018, SDG&E continued with its Rate Comparison Nurture Campaign. The Nurture Campaign sends a series of automated, pre-written messages over a specified period to move customers closer to conversion. Contacts receive messages based on behavioral triggers and may receive up to three messages (including reminders) over a 30-day period, depending on engagement level. The October campaign was sent to 32,384 customers and generated a 32% open rate and a 5% click through rate over the course of the month.

SDG&E also sent recertification reminder emails to 2,418 CARE customers who were due to recertify within the next 60 days. SDG&E received an open rate of 62% for these emails, with a click through rate of 47%.

Community Outreach & Engagement

Community outreach & engagement efforts allow SDG&E to educate, connect and directly engage with customers in communities where they work and live. Outreach and

¹¹ On February 9, 2018, the IOUs filed the Annual Estimates of Care Eligible Customers and Related Information. This number reflects SDG&E's CARE Eligible Participants for 2018. As reflected in filing A.14-11-007, et al., Annual CARE Eligibility Estimates.

engagement activities included events, presentations, workshops, trainings, partnerships with CBOs, and customized efforts.

CARE Partners (Capitation Agencies)

SDG&E partners with 20 social services agencies such as the WIC program, refugee assimilation organizations, 2-1-1 San Diego, and others to help enroll its hardest-to-reach customers. These organizations serve high-risk, low-income individuals and families with enrollment in state and federally-funded assistance programs, including Cal Fresh, LIHEAP, Covered California, and California Lifeline. The partnering organizations are located in diverse low-income communities serving multicultural/multilingual, seniors, veterans, special needs, and limited English proficient (LEP) audiences and provide multilingual staffing. During the month of October, SDG&E's CARE Partners enrolled 224 customers in the CARE Program and generated 45 ESA Program leads.

Cool Zones

SDG&E partners with the County of San Diego's Aging & Independent Services to promote 118 county facilities that customers can visit to beat the heat in extreme hot weather conditions during the months of May through October each year. On the 6th of each month, the County provides a monthly report to SDG&E highlighting activities provided by the County. For the month of October 2018, the County handled 87 calls.

Women's Infant & Children Organizations

SDG&E's Customer Solutions team provided training to the Women's Infant & Children's (WIC) Organizations, which included training for case workers on the

CARE and FERA programs. A total of 3 WIC offices were visited in the month of October.

County Health and Human Service Agency Collaboration:

SDG&E collaborates with the County of San Diego Health and Human Services Agency (HHSA) to connect customers to programs like CARE. All field HHSA offices include a source coded CARE application in their new client intake packets. In the month of October, 153 CARE applications were submitted to SDG&E resulting in 48 CARE enrollments and 70 program recertifications. Since January, 1,580 CARE applications have been submitted resulting in 562 enrollments and 755 recertifications.

2.3 CARE Recertification Complaints

2.3.1 Report the number of customer complaints received (formal or informal, however and wherever received) about their CARE recertification efforts, with the nature of the complaints and resolution.

During October 2018, SDG&E received one customer complaint regarding CARE recertification. The customer stated they were recertified over the phone with a 3rd party vendor; however, the recertification was not received by SDG&E. The customer recertification has now been completed, and the customer was rebilled for the period in which CARE was not received.

3. CHANGES REPORTING

In compliance with requirements outlined in D.12-12-011, SDG&E has updated CARE Table 10 information for the month of September 2018. October 2018 activity for Table 10, and Table 11 activity for August 1, 2018 through October 31, 2018, will be reported in a subsequent report.¹²

4. APPENDIX – ESA AND CARE PROGRAM TABLES

ESA Program - Table 1 - Program Expenses

ESA Program - Table 1A – Program Expenses Funded from 2009-2016 Unspent ESA Program Funds

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

ESA Program - Table 2A - Program Expenses & Energy Savings by Measures Installed (CSD Leveraging)

ESA Program - Table 2B - Program Expenses & Energy Savings by Measures Installed (Multifamily Common Area Measures)

ESA Program - Table 3 - Average Bill Savings per Treated Home

ESA Program - Table 4a - Homes Treated

ESA Program - Table 4b - Homes Unwilling/Unable to Participate

ESA Program - Table 5 - Program Customer Summary

ESA Program - Table 6 - Expenditures for Pilots and Studies

ESA Program – Table 7 - Second Refrigerator, In-Home Education,
MyEnergy/MyAccount Platform

CARE Program - Table 1 - CARE Overall Program Expenses

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

CARE Program - Table 3a - CARE Post-Enrollment Verification Results (Model)

CARE Program - Table 3b - CARE Post-Enrollment Verification Results (High Usage)

CARE Program - Table 4 - Self Certification and Re-Certification

CARE Program - Table 5 - Enrollment by County

CARE Program - Table 6 - Recertification Results

CARE Program - Table 7 - Capitation Contractors

CARE Program - Table 8 - Participants as of Month End

CARE Program - Table 9 - Expenditures for the CHANGES Pilot

CARE Program - Table 10 - CHANGES One-On-One Customer Assistance Sessions

CARE Program - Table 11 - CHANGES Group Customer Assistance Sessions

¹² SDG&E provides data from the previous month due to reporting delays from CHANGES which prevents SDG&E from reporting current month activity.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Energy Savings Assistance Program Table 1 - Expenses												
2	San Diego Gas & Electric												
3	October 2018												
4		Authorized Budget ^[1,2]			Current Month Expenses ^[3]			Year to Date Expenses			% of Budget Spent YTD		
5	ESA Program:	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
6	Energy Efficiency												
7	Appliances [4]	\$ 3,555,699	\$ 1,331,212	\$ 4,886,911	\$ 354,741	\$ -	\$ 354,741	\$ 1,721,178	\$ (81,639)	\$ 1,639,538	48%	-6%	34%
8	Domestic Hot Water	\$ 63,721	\$ 2,060,311	\$ 2,124,032	\$ 2,867	\$ 92,702	\$ 95,569	\$ 31,674	\$ 1,024,141	\$ 1,055,815	50%	50%	50%
9	Enclosure	\$ 1,917,114	\$ 2,966,933	\$ 4,884,047	\$ 105,381	\$ 139,691	\$ 245,073	\$ 1,442,203	\$ 1,911,758	\$ 3,353,961	75%	64%	69%
10	HVAC [4]	\$ 424,438	\$ 3,701,892	\$ 4,126,330	\$ 78,063	\$ 138,238	\$ 216,301	\$ 98,533	\$ 1,775,196	\$ 1,873,729	23%	48%	45%
11	Maintenance [4]	\$ 13,491	\$ 556,995	\$ 570,486	\$ -	\$ 21,648	\$ 21,648	\$ (13,176)	\$ 164,957	\$ 151,781	-98%	30%	27%
12	Lighting [5]	\$ 2,977,421	\$ -	\$ 2,977,421	\$ 510,604	\$ -	\$ 510,604	\$ 3,359,070	\$ -	\$ 3,359,070	113%	0%	113%
13	Miscellaneous	\$ 1,576,005	\$ -	\$ 1,576,005	\$ 82,881	\$ -	\$ 82,881	\$ 420,107	\$ -	\$ 420,107	27%	0%	27%
14	Customer Enrollment	\$ 2,150,145	\$ 2,150,145	\$ 4,300,290	\$ 466,406	\$ 466,406	\$ 932,813	\$ 1,387,826	\$ 1,387,826	\$ 2,775,652	65%	65%	65%
15	In Home Education	\$ 330,757	\$ 330,757	\$ 661,513	\$ 84,570	\$ 84,570	\$ 169,141	\$ 231,759	\$ 231,759	\$ 463,519	70%	70%	70%
16	Pilot	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
17	Fund Shifting Offset			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
18	Multi-Family Common Area Measures			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
19	Energy Efficiency TOTAL	\$ 13,008,791	\$ 13,098,244	\$ 26,107,035	\$ 1,685,514	\$ 943,257	\$ 2,628,771	\$ 8,679,175	\$ 6,413,997	\$ 15,093,172	67%	49%	58%
20													
21	Training Center	\$ 239,417	\$ 239,417	\$ 478,834	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
22	Inspections	\$ 86,707	\$ 86,707	\$ 173,414	\$ 4,908	\$ 4,908	\$ 9,816	\$ 50,135	\$ 50,135	\$ 100,270	58%	58%	58%
23	Marketing and Outreach	\$ 600,000	\$ 600,000	\$ 1,200,000	\$ 30,479	\$ 30,479	\$ 60,959	\$ 314,893	\$ 314,892	\$ 629,785	52%	52%	52%
24	Statewide Marketing Education and Outreach	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
25	Measurement and Evaluation Studies [6]	\$ 17,083	\$ 17,083	\$ 34,166	\$ 699	\$ 699	\$ 1,397	\$ 21,990	\$ 21,990	\$ 43,980	129%	129%	129%
26	Regulatory Compliance	\$ 136,982	\$ 136,982	\$ 273,964	\$ 10,299	\$ 10,299	\$ 20,597	\$ 90,336	\$ 90,336	\$ 180,672	66%	66%	66%
27	General Administration [7]	\$ 1,315,457	\$ 1,315,457	\$ 2,630,913	\$ 87,126	\$ 87,126	\$ 174,251	\$ 956,670	\$ 956,670	\$ 1,913,340	73%	73%	73%
28	CPUC Energy Division	\$ 22,950	\$ 22,950	\$ 45,900	\$ 1,556	\$ 1,556	\$ 3,112	\$ 7,370	\$ 7,370	\$ 14,741	32%	32%	32%
29	Reallocation (ME&O budget reduced from \$1.2M)	\$ 343,848	\$ 343,848	\$ 687,695	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
30													
31	TOTAL PROGRAM COSTS	\$ 15,771,234	\$ 15,860,687	\$ 31,631,921	\$ 1,820,580	\$ 1,078,323	\$ 2,898,903	\$ 10,120,568	\$ 7,855,391	\$ 17,975,959	64%	50%	57%
32	Funded Outside of ESA Program Budget												
33	Indirect Costs				\$ 74,040	\$ 70,110	\$ 144,149	\$ 398,402	\$ 388,239	\$ 786,642			
34	NGAT Costs [6]		\$ 305,000	\$ 305,000		\$ 27,917	\$ 27,917		\$ 161,374	\$ 161,374		53%	53%
35													
36	[1] Authorized budget does not include shifted funds from previous years and/or program cycles. Shifted funds, referred to as "2009-2016 Unspent ESA Program Funds", is reflected in ESA Table 1A.												
37	[2] Reflects the authorized funding in D.16-11-022 and updated via Resolution E-4884 addressing conforming Advice Letters 3065-E/2568-G and 3065-E-A/2568-G-A.												
38	[3] Current Month Expenses for Energy Efficiency Total includes October accrual and re-accrual of \$1,543,995 in the following reporting categories: Appliances \$222,148; Domestic Hot Water \$23,713; HVAC \$76,214; Misc. \$40,804; Lighting \$298,606; Maintenance \$15,537; Enclosure \$1,293; Customer Enrollment \$733,812; In Home Energy Education \$131,868.												
39	[4] Negative amounts are due to the accrual-reversals and/or adjustments for 2017 invoices posted in 2018.												
40	[5] Increased expense due to additional installation of LED measures that were not included in the original authorized												
41	[6] The budget amount of \$34,166 only reflects the 2018 portion of the total cycle budget of \$179,998. Expenditures include bills in 2018 for studies that were authorized in prior years.												
42	[7] Includes the reclassification of \$95,913 from Multi-Family Common Area Measures (previously reported in 2017 ESA Table 1A) to General Administration as directed by the CPUC's Energy Division disposition dated 5/23/18 regarding AL 3196-E/2654-G.												
43													
44	Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.												

**Energy Savings Assistance Program Table 1A - Expenses Funded From 2009-2016 Unspent ESA Program Funds
San Diego Gas & Electric
October 2018**

ESA Program:	Authorized Budget [1]			Current Month Expenses			Year to Date Expenses			% of Budget Spent YTD		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Energy Efficiency												
Multi-Family Common Area Measures [2]	\$ 989,875	\$ 1,010,125	\$ 2,000,000			\$ -	\$ (47,219)	\$ (47,219)	\$ (94,439)	-5%	-5%	-5%
In-Home Education	\$ 168,628	\$ 168,628	\$ 337,256			\$ -	\$ 23,438	\$ 23,438	\$ 46,877	14%	14%	14%
Leveraging - CSD	\$ 241,216	\$ 241,216	\$ 482,431			\$ -			\$ -	0%	0%	0%
Pilot [3]	\$ 112,500	\$ 112,500	\$ 225,000	\$ 2,293	\$ 2,293	\$ 4,586	\$ 2,293	\$ 2,293	\$ 4,586	0%	0%	2%
Measurement and Evaluation Studies [4]	\$ 30,625	\$ 30,625	\$ 61,250			\$ -			\$ -	0%	0%	0%
Regulatory Compliance	\$ -	\$ -	\$ -			\$ -			\$ -	0%	0%	0%
General Administration	\$ 50,683	\$ 50,683	\$ 101,365	\$ 393	\$ 393	\$ 786	\$ 3,146	\$ 3,146	\$ 6,292	6%	6%	6%
TOTAL UNSPENT PROGRAM COSTS	\$ 1,593,526	\$ 1,613,776	\$ 3,207,302	\$ 2,686	\$ 2,686	\$ 5,372	\$ (18,342)	\$ (18,342)	\$ (36,685)	15%	15%	17%

[1] Reflects the authorized funding in D.16-11-022 and updated via Resolution E-4884 addressing conforming Advice Letters 3065-E/2568-G and 3065-E-A/2568-G-A.

[2] Negative amount is the result of reclassifying of \$95,913 from Multi-Family Common Area Measures charged in 2017 to General Administration (ESA Table 1) as outlined in the CPUC's Energy Division disposition letter AL 3196-E/2654-G.

[3] Programmable Communicating Thermostat (PCT) Pilot budget reduced to \$450,000 (\$225,000/yr. for 2018 and 2019), from requested amount of \$500,000, effective May 2018, pursuant to CPUC's Energy Division disposition letter dated 5/3/18 regarding SDG&E AL 3197-E/2655-G.

[4] Funding authorized for Rapid Feedback Research and Analysis and Potential and Goals Study.

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

**Energy Savings Assistance Program Table 2A
San Diego Gas & Electric
October 2018**

Measures	Units	ESA Program - CSD Leveraging					
		Year-To-Date Completed & Expensed Installation					
		Quantity Installed	kWh[3] (Annual)	kW[3] (Annual)	Therms[3] (Annual)	Expenses (\$)	% of Expenditure
Appliances							
High Efficiency Clothes Washer	Each	-	-	-	-	\$ -	0.0%
Refrigerators	Each	-	-	-	-	\$ -	0.0%
Microwaves [4]	Each	-	-	-	-	\$ -	0.0%
Domestic Hot Water							
Water Heater Blanket	Home	-	-	-	-	\$ -	0.0%
Low Flow Shower Head	Home	-	-	-	-	\$ -	0.0%
Water Heater Pipe Insulation	Home	-	-	-	-	\$ -	0.0%
Faucet Aerator	Home	-	-	-	-	\$ -	0.0%
Water Heater Repair/Replacement	Each	-	-	-	-	\$ -	0.0%
Thermostatic Shower Valve	Each	-	-	-	-	\$ -	0.0%
New - Combined Showerhead/TSV	Each	-	-	-	-	\$ -	0.0%
New - Heat Pump Water Heater	Each	-	-	-	-	\$ -	0.0%
New - Tub Diverter/ Tub Spout	Each	-	-	-	-	\$ -	0.0%
New - Thermostat-controlled Shower Valve	Each	-	-	-	-	\$ -	0.0%
Enclosure							
Air Sealing / Envelope [1]	Home	-	-	-	-	\$ -	0.0%
Caulking	Home	-	-	-	-	\$ -	0.0%
Attic Insulation	Home	-	-	-	-	\$ -	0.0%
HVAC							
FAU Standing Pilot Conversion	Each	-	-	-	-	\$ -	0.0%
Furnace Repair/Replacement	Each	-	-	-	-	\$ -	0.0%
Room A/C Replacement	Each	-	-	-	-	\$ -	0.0%
Central A/C replacement	Each	-	-	-	-	\$ -	0.0%
Heat Pump Replacement	Each	-	-	-	-	\$ -	0.0%
Evaporative Cooler (Replacement)	Each	-	-	-	-	\$ -	0.0%
Evaporative Cooler (Installation)	Each	-	-	-	-	\$ -	0.0%
Duct Testing and Sealing	Home	-	-	-	-	\$ -	0.0%
New - Energy Efficient Fan Control	Home	-	-	-	-	\$ -	0.0%
New - Prescriptive Duct Sealing	Home	-	-	-	-	\$ -	0.0%
New - High Efficiency Forced Air Unit (HE FAU)	Home	-	-	-	-	\$ -	0.0%
New - A/C Time Delay	Home	-	-	-	-	\$ -	0.0%
Maintenance							
Furnace Clean and Tune	Home	-	-	-	-	\$ -	0.0%
Central A/C Tune up	Home	-	-	-	-	\$ -	0.0%
Lighting							
Interior Hard wired LED fixtures	Each	-	-	-	-	\$ -	0.0%
Exterior Hard wired LED fixtures	Each	-	-	-	-	\$ -	0.0%
Torchiere LED	Each	-	-	-	-	\$ -	0.0%
Occupancy Sensor	Each	-	-	-	-	\$ -	0.0%
LED Night Lights	Each	-	-	-	-	\$ -	0.0%
New - LED Diffuse Bulb (60W Replacement)	Each	-	-	-	-	\$ -	0.0%
New - LED Reflector Bulb	Each	-	-	-	-	\$ -	0.0%
New - LED Reflector Downlight Retrofit Kits	Each	-	-	-	-	\$ -	0.0%
New - LED A-Lamps	Each	-	-	-	-	\$ -	0.0%
Miscellaneous							
Pool Pumps	Each	-	-	-	-	\$ -	0.0%
Smart Power Strips - Tier 1	Each	-	-	-	-	\$ -	0.0%
New - Smart Power Strips - Tier 2	Each	-	-	-	-	\$ -	0.0%
Pilots							
Customer Enrollment							
Outreach & Assessment	Home	-	-	-	-	\$ -	0.0%
In-Home Education	Home	-	-	-	-	\$ -	0.0%
Total Savings/Expenditures							
						\$ -	0.0%
Total Households Weatherized [2]							
CSD MF Buildings Treated							
			Total				
			-				
- Multifamily			-				

[1] Envelope and Air Sealing Measures may include outlet cover plate gaskets, attic access weatherization, weatherstripping - door, caulking and minor home repairs. Minor home repairs predominantly are door jamb repair / replacement, door repair, and window putty.

[2] Weatherization may consist of attic insulation, attic access weatherization, weatherstripping - door, caulking, & minor home repairs.

[3] All savings are calculated based on the following sources:

Evergreen Economics "Impact Evaluation of the 2011 CA Low Income Energy Efficiency Program, Final Report." August 30, 2013.

[4] Microwave savings are from ECONorthWest Study received in December of 2011.

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

**Energy Savings Assistance Program Table 2B
San Diego Gas & Electric
October 2018**

*ESA Program - Multifamily Common Area							
Measures	Units	Year-To-Date Completed & Expensed Installation					
		Quantity Installed	kWh[3] (Annual)	kW[3] (Annual)	Therms[3] (Annual)	Expenses (\$)	% of Expenditure
Appliances							
High Efficiency Clothes Washer	Each						0.0%
Refrigerators	Each						0.0%
Microwaves	Each						0.0%
Domestic Hot Water							
Water Heater Blanket	Home						0.0%
Low Flow Shower Head	Home						0.0%
Water Heater Pipe Insulation	Home						0.0%
Faucet Aerator	Home						0.0%
Water Heater Repair/Replacement	Each						0.0%
Thermostatic Shower Valve	Each						0.0%
New - Combined Showerhead/TSV	Each						0.0%
New - Heat Pump Water Heater	Each						0.0%
New - Tub Diverter/ Tub Spout	Each						0.0%
New - Thermostat-controlled Shower Valve	Each						0.0%
Enclosure							
Air Sealing / Envelope [1]	Home						0.0%
Caulking	Home						0.0%
Attic Insulation	Home						0.0%
HVAC							
FAU Standing Pilot Conversion	Each						0.0%
Furnace Repair/Replacement	Each						0.0%
Room A/C Replacement	Each						0.0%
Central A/C replacement	Each						0.0%
Heat Pump Replacement	Each						0.0%
Evaporative Cooler (Replacement)	Each						0.0%
Evaporative Cooler (Installation)	Each						0.0%
Duct Testing and Sealing	Home						0.0%
New - Energy Efficient Fan Control	Home						0.0%
New - Prescriptive Duct Sealing	Home						0.0%
New - High Efficiency Forced Air Unit (HE FAU)	Home						0.0%
New - A/C Time Delay	Home						0.0%
Maintenance							
Furnace Clean and Tune	Home						0.0%
Central A/C Tune up	Home						0.0%
Lighting							
Interior Hard wired LED fixtures	Each						0.0%
Exterior Hard wired LED fixtures	Each						0.0%
Torchiere LED	Each						0.0%
Occupancy Sensor	Each						0.0%
LED Night Lights	Each						0.0%
New - LED Diffuse Bulb (60W Replacement)	Each						0.0%
New - LED Reflector Bulb	Each						0.0%
New - LED Reflector Downlight Retrofit Kits	Each						0.0%
New - LED A-Lamps	Each						0.0%
Miscellaneous							
Pool Pumps	Each						0.0%
Smart Power Strips - Tier 1	Each						0.0%
New - Smart Power Strips - Tier 2	Each						0.0%
Ancillary Services							
Commissioning [5]	Home						0.0%
Audit	Home						0.0%
Administration [4]	Home						0.0%
Pilots							
Customer Enrollment							
Outreach & Assessment	Home					\$ -	0.0%
In-Home Education	Home					\$ -	0.0%
Total Savings/Expenditures							
			-	-	-	\$ -	0.0%
Total Multifamily Buildings Weatherized [2]							
Multifamily Buildings Treated							
	Total						
- Multifamily	0						

[1] Envelope and Air Sealing Measures may include outlet cover plate gaskets, attic access weatherization, weatherstripping - door, caulking and minor home repairs. Minor home repairs predominantly are door jamb repair / replacement, door repair, and window putty.

[2] Weatherization may consist of attic insulation, attic access weatherization, weatherstripping - door, caulking, & minor home repairs.

[3] All savings are calculated based on the following sources:

Evergreen Economics "Impact Evaluation of the 2011 CA Low Income Energy Efficiency Program, Final Report." August 30, 2013.

[4] Per D.16-11-022 at p.210, the CPUC imposes a cap of 10% of ESA Program funds for administrative activities and a ceiling of 20% for direct implementation non-incentive costs.

[5] Refers to optimizing the installation of the measure installed such as retrofitting pipes, etc.

* Note: Applicable to Deed-Restricted, government and non-profit owned multi-family buildings described in D.16-11-022 where 65% of tenants are income eligible based on CPUC income requirements of at or below 200% of the Federal Poverty Guidelines.

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

Note: Implementation of the MF CAM Initiative AL 3196-E-A_2654-G-A was approved effective 5/30/2018.

	A	B
1	Energy Savings Assistance Program Table 3 - Energy Savings and Average Bill Savings per Treated Home/Common Area	
2	San Diego Gas & Electric	
3	October 2018	
4		
5	ESA Program	
6	Annual kWh Savings	3,446,138
7	Annual Therm Savings	132,072
8	Lifecycle kWh Savings	40,318,605
9	Lifecycle Therm Savings	1,408,948
10	Current kWh Rate	\$ 0.17
11	Current Therm Rate	\$ 0.63
12	Average 1st Year Bill Savings / Treated households	\$ 48.93
13	Average Lifecycle Bill Savings / Treated Household	\$ 515.95
14		
15		
16	ESA Program - CSD Leveraging	
17	Annual kWh Savings	-
18	Annual Therm Savings	-
19	Lifecycle kWh Savings	-
20	Lifecycle Therm Savings	-
21	Current kWh Rate	\$ -
22	Current Therm Rate	\$ -
23	Average 1st Year Bill Savings / Treated Households	\$ -
24	Average Lifecycle Bill Savings / Treated Household	\$ -
25		
26		
27	ESA Program - Multifamily Common Area	
28	Annual kWh Savings	-
29	Annual Therm Savings	-
30	Lifecycle kWh Savings	-
31	Lifecycle Therm Savings	-
32	Current kWh Rate	\$ -
33	Current Therm Rate	\$ -
34	Average 1st Year Bill Savings / Treated Buildings	\$ -
35	Average Lifecycle Bill Savings / Treated Buildings	\$ -
36		
37		
38	Summary - ESA Program/CSD Leveraging/ Multifamily Common Area [1]	
39	Annual kWh Savings	3,446,138
40	Annual Therm Savings	132,072
41	Lifecycle kWh Savings	40,318,605
42	Lifecycle Therm Savings	1,408,948
43	Current kWh Rate	\$ 0.17
44	Current Therm Rate	\$ 0.63
45	Average 1st Year Bill Savings / Treated households and Buildings	\$ 48.93
46	Average Lifecycle Bill Savings / Treated Household and Buildings	\$ 515.95
47		
48	[1] Summary is the sum of ESA Program + CSD Leveraging + Multifamily Common Area.	

	A	B	C	D	E	F	G
1	Energy Savings Assistance Program Table 4A - Homes/Buildings Treated						
2	San Diego Gas & Electric						
3	October 2018						
4							
5	ESA Program						
6	Eligible Households			Households Treated YTD			
7	County	Rural [1]	Urban	Total	Rural	Urban	Total
8	ORANGE	0	19,358	19,358	0	820	820
9	SAN DIEGO	7,533	305,205	312,738	407	12,368	12,775
10	Total	7,533	324,563	332,096	407	13,188	13,595
11							
12							
13	ESA Program - CSD Leveraging						
14					Households Treated YTD		
15	County				Rural	Urban	Total
16							0
17							0
18	Total				0	0	0
19							
20							
21	ESA Program - Multifamily Common Area						
22					Buildings Treated YTD		
23	County				Rural	Urban	Total
24							0
25							0
26	Total				0	0	0
27							
28	[1] For IOU low income-related and Energy Efficiency reporting and analysis, the Goldsmith definition is applied.						
29	Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.						

**Energy Savings Assistance Program Table 4B - Homes Unwilling / Unable to Participate
San Diego Gas & Electric
October 2018**

ESA Program		Reason Provided					
County	Customer Unwilling/Declined Program Measures	Customer Unavailable - Scheduling Conflicts	Hazardous Environment (unsafe/unclean)	Landlord Refused to Authorize Participation	Household Exceeds Allowable Limits	Unable to Provide Required Documentation	Other Infeasible/ Ineligible
SAN DIEGO	23,032	238	0	0	8,154	744	292
ORANGE	346	4	0	0	365	1	6
Total	23,378	242	0	0	8,519	745	298

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	Energy Savings Assistance Program Table 5 - Energy Savings Assistance Program Customer Summary																
2	San Diego Gas & Electric																
3	October 2018																
4	ESA Program																
5		Gas & Electric				Gas Only				Electric Only				Total			
6		# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Annual)		
7	Month		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW
8	January	60	4,507	118,496	98	-	-	-	-	21	-	12,111	2	81	4,507	130,607	100
9	February	1,874	21,876	383,674	206	-	-	-	-	202	-	52,921	12	2,076	21,876	436,594	218
10	March	2,135	26,553	471,716	289	-	-	-	-	237	-	56,700	16	2,372	26,553	528,417	305
11	April	1,871	22,578	438,121	288	-	-	-	-	240	-	51,971	15	2,111	22,578	490,092	303
12	May	2,089	23,075	522,932	356	-	-	-	-	125	-	30,414	6	2,214	23,075	553,346	363
13	June	47	2,728	132,697	16	-	-	-	-	9	-	7,009	1	56	2,728	139,707	17
14	July	532	5,512	226,992	26	-	-	-	-	35	-	12,705	2	567	5,512	239,697	28
15	August	501	4,990	242,119	27	-	-	-	-	124	-	16,736	1	625	4,990	258,855	28
16	September	441	2,396	269,573	28	-	-	-	-	33	-	8,603	1	474	2,396	278,176	29
17	October	2,903	17,859	371,152	43	-	-	-	-	116	-	19,497	2	3,019	17,859	390,649	44
18	November	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
19	December	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
20	YTD	12,453	132,072	3,177,471	1,377	-	-	-	-	1,142	-	268,667	57	13,595	132,072	3,446,138	1,435
21																	
22	YTD Total Energy Impacts for all fuel types should equal YTD energy impacts that are reported every month Table 2.																
23	Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.																
24																	
25																	
26	ESA Program - CSD Leveraging																
27		Gas & Electric				Gas Only				Electric Only				Total			
28		# of Buildings Treated by Month	(Annual)			# of Buildings Treated by Month	(Annual)			# of Buildings Treated by Month	(Annual)			# of Buildings Treated by Month	(Annual)		
29	Month		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW
30	January	0															
31	February	0															
32	March	0															
33	April	0															
34	May	0															
35	June	0															
36	July	0															
37	August	0															
38	September	0															
39	October																
40	November																
41	December																
42	YTD	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0
43																	
44																	
45	YTD Total Energy Impacts for all fuel types should equal YTD energy impacts that are reported every month Table 2A.																
46	Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.																
47																	
48	ESA Program - Multifamily Common Area																
49		Gas & Electric				Gas Only				Electric Only				Total			
50		# of Buildings Treated by Month	(Annual)			# of Buildings Treated by Month	(Annual)			# of Buildings Treated by Month	(Annual)			# of Buildings Treated by Month	(Annual)		
51	Month		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW
52	January	0															
53	February	0															
54	March	0															
55	April	0															
56	May	0															
57	June	0															
58	July	0															
59	August	0															
60	September	0															
61	October																
62	November																
63	December																
64	YTD	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0
65																	
66	YTD Total Energy Impacts for all fuel types should equal YTD energy impacts that are reported every month Table 2B.																
67	Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.																

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Energy Savings Assistance Program Table 6 - Expenditures for Pilots and Studies												
2	San Diego Gas & Electric												
3	October 2018												
4		Authorized 2018 Funding [1]			Current Month Expenses			Expenses Since January 1, 2018			% of Budget Expended		
5		Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
6	Pilots												
7	Programmable Communicating Thermostat (PCT)	\$ 112,500	\$ 112,500	\$225,000	\$0	\$0	\$0	\$0	\$0	\$0	0%	0%	0%
8													
9													
10	Total Pilots	\$112,500	\$112,500	\$225,000	\$0	\$0	\$0	\$0	\$0	\$0	0%	0%	0%
11													
12													
13	Studies												
14													
15	Rapid Feedback Research and Analysis [2]	\$3,750	\$3,750	\$7,500			\$0			\$0	0%	0%	0%
16	Low Income Needs Assessment (LINA)	\$9,375	\$9,375	\$18,750			\$0			\$0	0%	0%	0%
17	Load Impact Evaluation Study [3]	\$10,313	\$10,313	\$20,625	\$699	\$699	\$1,397	\$21,990	\$21,990	\$43,980	213%	213%	213%
18	2017 Potential and Goals Study [2]	\$9,375	\$9,375	\$18,750			\$0			\$0	0%	0%	0%
19	Equity Criteria and Non Energy Benefits Evaluation (NEB's)	\$2,813	\$2,813	\$5,625			\$0			\$0	0%	0%	0%
20	Unallocated Funds [4]	\$6,563	\$6,563	\$13,125			\$0			\$0	0%	0%	0%
21													
22													
23	Total Studies [2]	\$42,188	\$42,188	\$84,375	\$699	\$699	\$1,397	\$21,990	\$21,990	\$43,980	52%	52%	52%
24													
25	[1] Budget authorized in D.16-11-022.												
26	[2] D.16-11-022 directed the budget to be allocated from unspent 2009-2016 ESA program funds.												
27	[3] The budget amount of \$20,625 only reflects one-fourth of 2017-2020 cycle budget of \$82,500. Expenditures include bills in 2018 for studies that were authorized in prior years.												
28	[4] Unallocated funds represent the amount of funds originally requested for the Energy Education Phase II Study which was subsequently not authorized in D.16-11-022, however the budget was authorized and is now unallocated to any specific study.												
29	Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.												

Energy Savings Assistance Program Table 7 (Second Refrigerators, In-Home Education, MyEnergy/My Account Platform)

**San Diego Gas & Electric
October 2018**

Measures	Units	Received Refrigerator	Not eligible for Refrigerator due to Less than Six Occupants
Second Refrigerators	Each	1	3

Measures	Units	Households that Only Received Energy Education
In-Home Education	Home	0

Households for My Energy/My Account Platform		
Opt-Out	Already Enrolled	Opt-In
7,475	1,790	110

CARE Table 2 - Enrollment, Recertification, Attrition, & Penetration⁵
San Diego Gas & Electric
October 2018

Month	New Enrollment										Recertification				Attrition (Drop Offs)				Enrollment		Total CARE Participants	Estimated CARE Eligible ⁵	Penetration Rate % (W/X)		
	Automatic Enrollment				Self-Certification (Income or Categorical)						Total New Enrollment (E+J)	Scheduled	Non-Scheduled (Duplicates)	Automatic	Total Recertification (L+M+N)	No Response ⁴	Failed PEV	Failed Recertification	Other	Total Attrition (P+Q+R+S)				Gross (K+O)	Net Adjusted (K-T)
	Inter-Utility ¹	Intra-Utility ²	Leveraging ³	Combined (B+C+D)	Online	Paper	Phone	Capitation	Combined (F+G+H+I)																
January	1	301	0	302	4,613	226	275	882	5,996	6,298	2,971	3,445	4,121	10,537	2,948	66	77	3,787	6,878	16,835	-580	281,648	321,323	88%	
February	0	260	0	260	3,640	1,461	203	303	5,607	5,867	2,477	2,707	3,200	8,384	1,924	126	106	3,664	5,820	14,251	47	281,695	321,323	88%	
March	0	226	0	226	3,667	1,071	322	217	5,277	5,503	1,951	2,573	4,158	8,682	1,819	55	80	2,297	4,251	14,185	1,252	282,947	321,323	88%	
April	0	227	0	227	3,368	943	262	186	4,759	4,986	2,289	2,154	3,354	7,797	648	44	66	4,685	5,443	12,783	-457	282,490	321,323	88%	
May	0	179	0	179	4,198	1,197	330	240	5,965	6,144	2,620	2,037	4,400	9,057	1,340	41	52	2,873	4,306	15,201	1,838	284,328	321,323	88%	
June	0	36	0	36	3,603	1,111	339	102	5,155	5,191	1,481	1,163	3,263	5,907	1,298	48	27	11,081	12,454	11,098	-7,263	277,065	321,323	86%	
July	0	27	0	27	2,681	1,065	188	109	4,043	4,070	1,196	2,583	2,353	6,132	1,285	41	63	-5,990	-4,601	10,202	8,671	285,736	321,323	89%	
August	0	74	0	74	5,793	1,727	788	260	8,568	8,642	2,140	2,688	3,079	7,907	851	62	210	5,577	6,700	16,549	1,942	287,678	321,323	90%	
September	0	133	0	133	4,072	1,203	597	231	6,103	6,236	1,557	2,728	2,685	6,970	786	53	173	2,045	3,057	13,206	3,179	290,857	321,323	91%	
October	0	320	0	320	3,741	653	199	224	4,817	5,137	2,049	4,104	3,003	9,156	2,413	49	119	6,884	9,465	14,293	-4,328	284,884	321,323	89%	
November			0	0						0				0					0	0	0				
December			0	0						0				0					0	0	0				
YTD Total	1	1,783	0	1,784	39,376	10,657	3,503	2,754	56,290	58,074	20,731	26,182	33,616	80,529	15,312	585	973	36,903	53,773	138,603	4,301	284,884	321,323	89%	

¹ Enrollments via data sharing between the IOUs.
² Enrollments via data sharing between departments and/or programs within the utility.
³ Enrollments via data sharing with programs outside the IOU that serve low-income customers.
⁴ No response includes no response to both Recertification and Verification.
⁵ As reflected in filing A.14-11-007, et al., Annual CARE Eligibility Estimates filed February 9, 2018.

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

	A	B	C	D	E	F	G	H	I
1	CARE Table 3A - Post-Enrollment Verification Results (Model)								
2	San Diego Gas & Electric								
3	October 2018								
4	Month	Total CARE Households Enrolled	Households Requested to Verify ¹	% of CARE Enrolled Requested to Verify Total	CARE Households De-enrolled (Due to no response)	CARE Households De-enrolled (Verified as Ineligible) ²	Total Households De-enrolled ³	% De-enrolled through Post Enrollment Verification ⁴	% of Total CARE Households De-enrolled
5	January	290,016	1,808	0.6%	940	54	1,047	57.9%	0.4%
6	February	288,055	1,063	0.4%	586	39	664	62.5%	0.2%
7	March	289,906	1,162	0.4%	645	33	66	5.7%	0.0%
8	April	287,654	1,029	0.3%	521	39	598	58.1%	0.2%
9	May	289,639	1,134	0.4%	631	46	723	63.8%	0.2%
10	June	289,371	1,124	0.4%	425	27	472	42.0%	0.2%
11	July	287,470	1,451	0.5%	696	30	618	42.6%	0.2%
12	August	290,328	1,472	0.5%	30	11	52	3.5%	0.0%
13	September	289,212	1,202	0.4%	10	2	13	1.1%	0.0%
14	October	284,884	1,480	0.5%	9	1	11	0.7%	0.0%
15	November								
16	December								
17	YTD Total	284,884	12,925	4.5%	4,493	282	4,264	33.0%	1.5%
18									
19	¹ Includes all customers who failed SDG&E's CARE eligibility probability model.								
20	² Includes customers verified as over income or who requested to be de-enrolled.								
21	³ Verification results are tied to the month initiated and the verification process allows customers 90 days to respond to the verification request.								
22	⁴ Percentage of customers dropped compared to the total participants requested to provide verification in that month.								
23	Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD								
24									
25	CARE Table 3B Post-Enrollment Verification Results (Electric only High Usage)								
26	San Diego Gas & Electric								
27	October 2018								
28	Month	Total CARE Households Enrolled	Households Requested to Verify ¹	% of CARE Enrolled Requested to Verify Total	CARE Households De-enrolled (Due to no response)	CARE Households De-enrolled (Verified as Ineligible) ²	Total Households De-enrolled ³	% De-enrolled through Post Enrollment Verification ⁴	% of Total CARE Households De-enrolled
29	January	281,648	1,590	0.6%	461	114	575	36.2%	0.2%
30	February	281,695	816	0.3%	290	40	330	40.4%	0.1%
31	March	282,947	965	0.3%	311	65	66	6.8%	0.0%
32	April	282,490	937	0.3%	429	65	494	52.7%	0.2%
33	May	284,328	1,013	0.4%	525	82	607	59.9%	0.2%
34	June	277,065	1,035	0.4%	276	54	330	31.9%	0.1%
35	July	285,736	1,068	0.4%	0	56	56	5.2%	0.0%
36	August	287,678	1,048	0.4%	0	14	14	1.3%	0.0%
37	September	290,857	1,056	0.4%	0	1	1	0.1%	0.0%
38	October	284,884	954	0.3%	0	0	0	0.0%	0.0%
39	November								
40	December								
41	YTD Total	284,884	10,482	3.7%	2,292	491	2,473	23.6%	0.9%
42									
43	¹ Includes all participants who were selected for high usage verification process.								
44	² Includes customers verified as over income, who requested to be de-enrolled, did not reduce usage, or did not agree to be weatherized.								
45	³ Medium (400%) and high usage (600%) customers are dropped at 60 days (2 or 3 bill cycles) for non-response to HUV (high usage income verification request). Additionally, 600% + users that have not reduced usage within the 60 day window (2 or 3 bill cycles) are removed from the program. Results may be pending due to the time permitted for a participant to respond.								
46	⁴ Percentage of customers dropped compared to the total participants requested to provide verification in that month.								
47	Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.								

	A	B	C	D	E	F	G
1	CARE Table 4 - CARE Self-Certification and Self-Recertification Applications¹						
2							
3							
		Provided	Received	Approved	Denied	Pending/Never Completed	Duplicates
4							
5	Total (Y-T-D)		132,716	100,698	20,924	657	10,437
6	Percentage		100%	76%	16%	0%	8%
7							
8	¹ Includes sub-metered.						
9	Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.						

	A	B	C	D	E	F	G	H	I	J
1	CARE Table 5 - Enrollment by County									
2	San Diego Gas & Electric									
3	October 2018									
4	County	Estimated Eligible Households¹			Total Households Enrolled²			Penetration Rate		
5		Urban	Rural	Total	Urban	Rural	Total	Urban	Rural	Total
6	Orange	18,049	0	18,049	11,676	0	11,676	65%	0%	65%
7	San Diego	295,928	7,346	303,274	267,340	5,868	273,208	90%	80%	90%
8	Total	313,977	7,346	321,323	279,016	5,868	284,884	89%	80%	89%
9										
10	¹ As reflected in filing A.14-11-007, et al., Annual CARE Eligibility Estimates filed February 9, 2018.									
11	² Total Households Enrolled includes submeter tenants.									
12	Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.									

	A	B	C	D	E	F	G	H
1	CARE Table 6 - Recertification Results							
2	San Diego Gas & Electric							
3	October 2018							
4	Month	Total CARE Households	Households Requested to Recertify ¹	% of Households Total (C/B)	Households Recertified ²	Households De-enrolled ³	Recertification Rate % ⁴ (E/C)	% of Total Households De-enrolled (F/B)
5	January	281,648	2,970	1.1%	2,106	477	70.9%	0.2%
6	February	281,695	2,174	0.8%	1,548	359	71.2%	0.1%
7	March	282,947	3,299	1.2%	2,631	637	79.8%	0.2%
8	April	282,490	2,832	1.0%	1,990	628	70.3%	0.2%
9	May	284,328	1,954	0.7%	1,360	389	69.6%	0.1%
10	June	277,065	2,402	0.9%	1,145	82	47.7%	0.0%
11	July	285,736	2,917	1.0%	1,674	104	57.4%	0.0%
12	August	287,678	2,730	0.9%	887	54	32.5%	0.0%
13	September	290,857	2,571	0.9%	134	17	5.2%	0.0%
14	October	284,884	3,091	1.1%	439	14	14.2%	0.0%
15	November							
16	December							
17	YTD	290,857	26,940	9.3%	13,914	2,761	51.6%	0.9%
18								
19	¹ Excludes count of customers recertified through the probability model.							
20	² Recertification results are tied to the month initiated and the recertification process allows customers 90 days (3 or 4 bill cycles) to respond to the recertification request. Results may be pending due to the time permitted for a participant to respond.							
21	³ Includes customers who did not respond or who requested to be de-enrolled.							
22	⁴ Percentage of customers recertified compared to the total participants requested to recertify in that month.							
23	Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.							

	A	B	C	D	E	F	G
1	CARE Table 7 - Capitation Contractors¹						
2	San Diego Gas & Electric						
3	October 2018						
4	Contractor	Contractor Type				Total Enrollments	
5		(Check one or more if applicable)				Current	Year-to-Date
6		Private	CBO	WMDVBE	LIHEAP	Month	
7	211 SAN DIEGO (SD)		X			277	2,311
8	ALLIANCE FOR AFRICAN ASSISTANCE		X			0	9
9	AMERICAN RED CROSS WIC		X	X		11	111
10	CHULA VISTA COMM COLLABORATIVE		X			3	47
11	COMMUNITY RESOURCE CENTER - 2010		X			1	4
12	DEAF COMMUNITY SERVICES		X			0	0
13	HEARTS AND HANDS TOGETHER		X			0	7
14	INTERFAITH COMMUNITY SERVICES		X			1	6
15	LA MAESTRA FAMILY CLINIC (LMFC)		X			14	264
16	MAAC PROJECT - CARE		X		X	9	119
17	NEIGHBORHOOD HEALTH CARE		X			1	17
18	NEIGHBORHOOD HEALTH INSURANCE CENTER	X				0	1
19	NORTH COUNTY HEALTH SERVICES		X			14	205
20	SAN DIEGO STATE UNIVERSITY WIC		X			8	57
21	SAN YSIDRO HEALTH CENTERS		X			41	309
22	SCRIPPS HEALTH WIC (SHW)		X			1	20
23	UNION OF PAN ASIAN COMMUNITIES (UPAC)		X			0	0
24	VISTA COMMUNITY CLINIC		X			2	17
25	Total Enrollments					383	3,504
26	¹ All capitation contractors with current contracts are listed regardless of whether they have signed up customers or submitted invoices this year. Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.						
27							
28							

	A	B	C	D	E	F	G	H	I
1	CARE Table 8 - Households as of Month-End								
2	San Diego Gas & Electric								
3	October 2018								
4	Month	Gas and Electric	Gas Only	Electric Only	Total	Eligible Households ¹	Penetration	% Change	Total Residential Accounts ²
5	January	182,376	N/A	99,272	281,648	321,323	88%	0.1%	1,287,352
6	February	181,926	N/A	99,769	281,695	321,323	88%	0.0%	1,288,509
7	March	182,776	N/A	100,171	282,947	321,323	88%	0.4%	1,289,393
8	April	182,038	N/A	100,452	282,490	321,323	88%	-0.1%	1,291,259
9	May	183,734	N/A	100,594	284,328	321,323	88%	0.6%	1,292,452
10	June	184,136	N/A	92,929	277,065	321,323	86%	-2.3%	1,293,419
11	July	183,967	N/A	101,769	285,736	321,323	89%	2.7%	1,288,593
12	August	184,839	N/A	102,839	287,678	321,323	90%	0.6%	1,289,272
13	September	187,148	N/A	103,709	290,857	321,323	91%	1.0%	1,290,427
14	October	174,117	N/A	110,767	284,884	321,323	89%	-2.3%	1,295,377
15	November								
16	December								
17	YTD	174,117	N/A	110,767	284,884	321,323	89%	1.0%	1,295,377
18									
19	¹ As reflected in filing A.14-11-007, et al., Annual CARE Eligibility Estimates filed February 9, 2018.								
20	² Data represents total residential electric customers.								
21									
22	Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.								

	A	B	C	D	E
1	CARE Program Table 9 - Expenditures for Pilots/CHANGES Program [1]				
2	San Diego Gas & Electric				
3	October 2018				
4	2018	Authorized 2018 Budget	Current Month Expenses	Expenses Since Jan. 1, 2018	% of 2018 Budget Expended
5		Total	Total	Total	Total
6					
7					
8	CHANGES Program	\$ 262,500	\$ 21,875	\$ 198,427	76%
9					
10					
11	Total	\$ 262,500	\$ 21,875	\$ 198,427	76%
12					
13	[1] Decision 15-12-047 transitioned from CHANGES pilot to CHANGES program and funding for the effort is captured herein.				
14					
15	Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.				

CARE Table 10 CHANGES One-On-One Customer Assistance San Diego Gas & Electric	
Reporting Period September 2018¹	
No. of attendees at education sessions	339
Disputes	
Add Level Pay Plan	0
Assisted with CARE Re-Certification/Audit	0
Changed 3rd party Company/Gas Aggregation	0
Changed 3rd Party Electricity Aggregation	0
Medical Baseline Application	0
Refer to Energy Assistance Programs	6
Request Meter Service or Testing	0
Request Bill Adjustment	0
Request Customer Service Visit	0
Schedule Energy Audit	2
Payment Extension	0
Payment Plan	0
Solar	0
Stop Disconnection	2
Time of Use	0
Wildfire Related Issue	0
Total disputes	10

Needs Assistance	
Add Level Pay Plan	0
Assisted with CARE Re-Certification/Audit	1
Assisted with Changes to Account	0
Energy Efficiency Tool	0
Assisted High Energy User with CARE Doc Submission	0
Assisted with Reconnection	0
Billing Language Changed	0
Consumer Education Only	0
Electricity Aggregation	0
Energy Alerts	0
Enrolled in Demand Response Programs	0
ESAP	1
HEAP	6
Medical Baseline	0
Neighbor to Neighbor	8
REACH	0
Reported Safety Problem	0
Reported Scam	0
Set Up 3rd Party Notification	0
Set Up New Account	0
Payment Extension	0
Payment Plan	0
Wildfire Related Issue	0
Total Needs Assistance [2]	16

Education: Education sessions were held in a mix of one on one, and group sessions. Education materials are available as fact sheets on the CPUC Website: http://consumers.cpuc.ca.gov/team_and_changes/

Disputes & Needs Assistance -Support was provided in the following languages: Arabic, English, Swahili, Somail and Spanish.

[1] There is a one-month lag behind the current reporting month.

[2] Contractor is in the process of validating the total. If there is a discrepancy in the numbers reported, the numbers will be corrected in the October 2018 report.

* Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

