BEFORE THE PUBLIC UTILITIES COMMISSION
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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.	Application 14-11-007 (Filed November 18, 2014)
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MONTHLY REPORT OF SAN DIEGO GAS & ELECTRIC COMPANY (U 902 M) ON LOW-INCOME ASSISTANCE PROGRAMS FOR OCTOBER 2019

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This is the tenth monthly report for program year (PY) 2019. The purpose of this report is to consolidate activity for the California Alternate Rates for Energy (CARE) Program and Energy Savings Assistance (ESA) Program and provide the California Public Utilities Commission's (CPUC or Commission) Energy Division with all the necessary information to assist in analyzing the low-income programs.

This report presents year-to-date ESA Program and CARE Program results and expenditures through October 2019 for San Diego Gas & Electric Company (SDG&E).

Respectfully submitted,

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November 21, 2019

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 October 2019			
	2019 Authorized / Planning Assumptions	**Actual to Date[1]**	**%**
Budget[2]	$34,652,791	15,228,617	44%
Homes Treated[3]	22,641	9,710	43%
kWh Saved	6,880,000	3,098,913	45%
kW Demand Reduced	3,954	2,118	54%
Therms Saved	400,000	24,626	6%
GHG Emissions Reduced (Tons)	6,124	1,848	30%

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 California Department of Community Services and Development (CSD) leveraging and multifamily common area measure installations. Through October, there has been no invoicing for measure installations for CSD leveraging or multifamily common area.
[2] Budget authorized in CPUC approval of SDG&E Advice Letter 3250-E/2688-G dated December 27, 2018 for program years 2019 and 2020.
[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 1,263 ESA Program leads and 1,262 enrollments. Overall, ESA Program marketing, education and outreach efforts were successful in creating 5,637 leads and 1,611 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. In October, SDG&E received a list of 58 customers identified as potential ESA Program leads. SDG&E is in the process of working through the list to identify customers who could potentially benefit from ESA Program treatment.

Additionally, D.16-11-022 required the utilities to provide GRID Alternatives with information on CARE high energy usage (HEU) customers who have participated in the ESA program. A total of eight leads for September were provided to GRID Alternatives in October.

ESA Program Multifamily Common Area Measure (MF CAM) Initiative

In October 2019, SDG&E's ESA Program MF CAM implementor, Willdan, continued targeted marketing to potential ESA MF CAM properties, including re-syndication projects in SDG&E's service territory. In October, SDG&E's CAM implementer completed measure installations at one qualified property; funds spent will be billed in November and should appear in the November monthly report along with five other completed projects that were completed in September. There are a total of four properties pending Energy Assessments/Audits. In addition, Willdan Energy has identified other potential properties that have been scheduled for assessments in the month of November 2019.

For information on the MF CAM initiative, go to SDG&E's website page at https://www.sdge.com/businesses/savings-center/esa-common-area-measures-program to get a description of the MF CAM initiative, eligibility requirements, program flow, and contact information for Willdan Energy, SDG&E's implementor.

Language Line

Language Line® is utilized to make sure customers with limited English proficiency (LEP) have a channel in which to communicate with ESA Program contractors in the language of their preference. In October, 11 customers were served by the Language Line.

Language	Calls
Arabic	8
Russian	1
Vietnamese	2
TOTAL	11

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 2019 campaign's intent is to make a connection with customers in order to drive conservation and provide monthly savings on their energy bill. The campaign runs in English, Spanish and Asian languages and 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 2019 are summarized in the following sections:

Print Advertising:

SDG&E is running English print in rural communities and African-American publications. In-language print in Chinese, Vietnamese, Tagalog (Filipino) and Spanish language publications began in March. The 2019 print campaign will continue running through December 2019.

Online Advertising:

In 2019, SDG&E continued its digital advertising campaign. In October, paid search advertising garnered 64,412 impressions with 13,895 customers clicking through to the CARE/ESA Programs online enrollment application. Banner ads contributed 3,219,036 impressions with 9,327 clicks. Paid social media garnered 306,562 impressions with 2,404 clicks. Pre-roll video contributed 201,648 impressions with 623 clicks.

Social Media:

Using e-newsletters, website posts and social media channels, the Energy Solutions Partner Network shared 32 CARE and ESA Program messages to an audience of more than 36,000 followers. SDG&E's social media profile also posts messaging to an audience of more than 48,000 followers. These followers are then able to redistribute the messages to their own networks on social media.

San Diego Futures @sdfutures · Oct 1

Find out if you qualify for SDG&E's 30% energy bill discount through the CARE program. Visit ow.ly/i9fm50wyJVN. #CARE **#espsdge** #energyhelp

United Way San Diego @UnitedWaySD · Oct 26

30% off your energy bill can help you rest a little easier. Our partners at @SDGE are aligned with our goal to support the families of our region by creating a bill-relief program. Find out if you qualify at sdge.com/CARE. #sdgesaturdays **#energytips4U** #sdge

1 1

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.

In October 2019, 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 2019 generated the following numbers:

The Harris Group	
ESA Leads	0
CARE Enrollments	3,898
CARE Recertifications	812

Email:

SDG&E sent 8,866 ESA Program promotional emails to potential ESA-eligible customers enrolled in CARE to introduce the customers to the ESA Program and encourage them to apply online. SDG&E adjusted the creative materials for

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

this campaign by having the email link directly to an ESA Program 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 course of the month, there was an average open rate of 43% and a 4% click through rate[5].

Direct Mail

SDG&E sent an ESA Program promotional postcard to 1,153 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 190 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

[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).

including messaging through e-mail and social media channels such as Facebook, Twitter, and Instagram, posting information on their websites, providing booth space at events, and hosting enrollment day fairs at their locations. In October 2019, SDG&E's partner outreach activities resulted in the following activities:

Energy Solutions Partner Network	
ESA Leads	19
CARE Enrollments	27
CARE Recertifications	32

Partner Spotlight:

In October 2019, the SDG&E Customer Solutions Outreach Team participated in 65 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.

On October 1, a presentation on CARE, ESA, Medical Baseline and various SDG&E programs was given to a group of teachers from the San Diego Council On Literacy (SDCOL); an organization whose mission is to unite the community to support literacy. These teachers work with various schools throughout the

SDG&E territory. This group was very interested to learn about the low-income programs in an effort to educate and suggest parents to enroll in the programs.

On October 13, Outreach presented low-income programs and services to residents of the Town & Country Apartments in San Diego. Some of the attendees/residents are currently CARE and Medical Baseline customers but still had many questions on how to save energy and what other programs are available. Others were interested in CARE as well as Level Pay Plan once understanding the program details.

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 pairs multicultural contractors with employees that are fluent in various languages to help staff events and presentations. These contractors are fluent in the following languages: Spanish, Vietnamese, Chinese, Tagalog, Aramaic/Arabic, American Sign Language, and other languages as requested. During October 2019, SDG&E completed 45 outreach events. A summary of these activities is listed below:

Date	Location	Partner / Hosting Organization	Event Title
10/1/2019	4060 Fairmount Ave. San Diego CA 92105	La Maestra Community Health Centers	Breast Cancer Awareness Kickoff Fair
10/2/2019	1912 Arnold Way Alpine, CA 91901	Feeding San Diego	Food Distribution
10/2/2019	Educational Cultural Complex 4343 Ocean View Blvd San Diego, CA 92113	SDCEats	Community Health Event
10/4/2019	4S Ranch Sports Park 16118 4S Ranch Parkway San Diego 92127	Movies in the Park	Mary Poppins Returns

10/4/2019	Doyle Community Park 8175 Regents Rd, San Diego 92122	Movies in the Park	Casper
10/5/2019	34884 Lilac Ext. Rd Pala, CA 92059	Pala Fire Department	Pala Open House
10/5/2019	Intersection of Euclid, Miracle and Adams 92115	Talmadge Block Party	Talmadge Block Party
10/5/2019	Spanish Landing Park West 4300 North Harbor Dr. San Diego, 92101	San Diego Fire Rescue Foundation	San Diego Fire Rescue 5K & Kids Run
10/5/2019	Camino Ruiz and Mira Mesa Blvd San Diego, CA 92126	Mira Mesa Town Council	Mira Mesa Street Fair
10/5/2019	Santa Clara Point 1008 Santa Clara Place San Diego 92109	Movies in the Park	The Nightmare Before Christmas
10/5/2019	Sunset Room - Marina Village 1936 Quivira Way San Diego, CA 92109	Access Inc.	Esperanza: A story of hope
10/5/2019	Women's Resource Center 3385 Mission Ave Oceanside	Women's Resource Center	Thrift Shop Awareness
10/8/2019	305 W. California Ave Vista, CA 92083	Feeding San Diego	Food Distribution
10/8/2019	25925 Camino Del Avion San Juan Capistrano	City of San Juan Capistrano	Senior Health Fair
10/10/2019	Murphy Canyon Housing 3293 Santo Road San Diego Ca 92124	Armed Services YMCA	The Neighborhood Exchange Event

10/11/2019	Allied Gardens Community Park 5155 Greenbrier Ave. San Diego, CA 92120	Movies in the Park	Goosebumps 2: Haunted Halloween
10/11/2019	Waterfront Park 1600 Pacific Highway, San Diego CA 92101	Movies in the Park	The Nightmare Before Christmas
10/12/2019	719 Cesar E. Chavez Parkway, San Diego, CA 92113	Calvary Baptist Church	Annual Church and Community Prayer Breakfast
10/12/2019	Jacobs Center 404 Euclid St San Diego, CA 92114	Deaf Community Services	San Diego DEAF Festival
10/12/2019	Hellhole Canyon County Preserve 19324 Santee Lane Valley Center 92082	Movies in the Park	How to Train Your Dragon: The Hidden World
10/12/2019	2425 Dusk Drive San Diego CA 92139	Filamfest	Filipino American Arts & Culture Festival
10/12/2019	Balboa Park (grass area) Park Blvd at Presidents Way Lawn, San Diego, 92101	SHARP Health Care	Disaster Preparedness EXPO
10/12/2019	1030 Calle Negocio, San Clemente, CA 92673	Family Ministries of Orange County	Food Bank
10/13/2019	Living Coast Discovery Center 1000 Gunpowder Point Drive Chula Vista, CA 91910	Living Coast Discovery Center	Animals on the Bay Day
10/13/2019	Logan Heights Family Health Center	FHCSD	Vive tu Vida
10/13/2019	South Crest Recreation Center Park 4149 Newton Ave San Diego, CA 92113	Herencia Hispana San Diego	Hispanic Heritage Parade and Festival

10/15/2019	Reading Cinemas at Grossmont Mall 5500 Grossmont Center Drive, Ste.169 La Mesa, CA 91942	Oasis	Tech Fair for 50+
10/17/2019	Grocery Outlet Bargain Market 444 E. San Ysidro Blvd., San Ysidro , CA 92173	San Ysidro Health	National Latino AIDS Awareness day
10/17/2019	St Augustine High School - 3266 Nutmeg St. San Diego, CA 92104	ABC Youth Foundation	The Main Event
10/18/2019	Viejas Tribal Recreation Center 1B Viejas Grade Rd. Alpine 91901	Viejas Tribal Council	Viejas Wellness Event
10/18/2019	Flinn Springs County Park 14787 Olde Hwy 80 El Cajon, CA 92021	Movies in the Park	Hocus Pocus
10/19/2019	Oceanside Station 7 3350 Mission Ave Oceanside 92058	Oceanside Fire Department	Open House
10/19/2019	Norman P. Murray Community Center 24932 Veterans Way Mission Viejo CA	City of Mission Viejo	South Orange County Disaster Preparedness EXPO
10/19/2019	Otay Lakes County Park 2270 Wueste Road Chula Vista, CA 91915	Movies in the Park	Beetlejuice
10/19/2019	San Diego City College 1313 Park Blvd. San Diego CA 92101	Urban League	Wealth Building Resource Fair
10/19/2019	Christmas Circle Borrego Springs	Borrego Chamber	Borrego Days Festival
10/20/2019	Christmas Circle Borrego Springs	Borrego Chamber	Borrego Days Festival

10/24/2019	Bayview Hills Housing 1816 Sky Harbor Rd San Diego Ca 92139	Armed Services YMCA	The Neighborhood Exchange Event
10/25/2019	Heritage County Park 2454 Heritage Park Row San Diego, CA 92110	Movies in the Park	Gremlins
10/25/2019	XiMED Medical 9850 Genesee Ave, La Jolla CA.	Anthem	Resource Fair
10/26/2019	Balboa Park Visitor Center	iHeart	BALBOA PARK HALLOWEEN FAMILY DAY
10/26/2019	Lindo Lake County Park 12660 Lindo Ln, Lakeside 92040	Movies in the Park	Halloween Festival / Hotel Transylvania 3: Summer Vacation
10/26/2019	Alpine Fire Department 1364 Tavern Rd. Alpine CA 91901	Alpine Fire Protection District	Alpine Fire Open House
10/29/2019	1391 Engineer St. Vista CA 92081	Vista Irrigation District	Health, Safety, and Benefits Fair
10/31/2019	4060 Fairmount Ave. San Diego CA 92105	La Maestra Community Health Centers	Spook La Maestra

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 2019, SDG&E's CCC generated the following applications and leads:

	CCC	Branch Office
ESA Leads	11	24
CARE Enrollments	18	339
CARE Recertifications	13	35

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. SDG&E contracts with two local agencies offering Outreach and Assessments services to provide greater

leveraging opportunities and provide customers with the benefits of both programs. In October, LIHEAP organizations enrolled 78 customers in the ESA Program.

As part of SDG&E leveraging agreement with San Diego County Water Authority (SDCWA), SDCWA reimburses SDG&E for water measures installed, as part of the ESA Program, in homes where customers have an active SDCWA account. In September, SDCWA added additional funds to the SDG&E contract to make sure funds are available through December 2020. This agreement will continue until December 31, 2020 or until SDCWA's funds are exhausted.

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.

In October, SDG&E offered Natural Gas Appliance Testing (NGAT) training to all contractors interested in participating. A total of 7 contractor employees participated in the 3-day training.

1.5 Miscellaneous

1.5.1 ESA Program Studies

According to the legislative mandate, the current Low-Income Needs Assessment (LINA) is scheduled to be completed by December 31, 2019. A competitive solicitation for a consultant to conduct the statewide study was completed in January 2018. Research Into Action is the consultant selected to undertake the

evaluation. The draft research plan was presented in a public webinar on May 29, 2018, and the final research plan was completed in June 2018. During the subsequent months, the study team developed and refined data collection instruments, conducted customer and contractor surveys and interviews, and began analysis of the data. A draft report was provided to the study team to review on August 15, 2019 and is currently under review. A webinar is scheduled for November 14 to present the draft results to interested stakeholders. A review and comment period will follow the webinar and the report will be finalized and posted in December.

The Impact Evaluation Study for the ESA Program began in January 2017. Phase 1 results were delivered on March 31, 2018 and revised on June 6, 2018. Energy Division directed the investor-owned utilities (IOUs) to use the Phase 1 results for the Low-Income Mid-cycle filing.

Additional analysis was completed during phase 2, which involved adding additional data and refining the analysis. Results were presented in a webinar on April 8, 2019 and the study is now complete. The results were used to develop new ex ante savings estimates for program measures.

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 24, 2018. Draft deliverables were provided by the consultant at the end of April 2019, and the IOUs provided extensive comments and edits on these deliverables throughout multiple revisions from May to July. A stakeholder webinar was held on August 2 to present the draft report. The final report, along with stakeholder comments, was posted on August 30, 2019. The study is now complete.

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. The current Control group contains 89 customers and 48 customers in the Treatment group.

In July, SDG&E received a draft of the second survey which will be issued to customers during September or October. The later survey date is due to milder

temperatures than expected in July. The evaluator and utilities believe that allowing the customer to experience warmer temperatures prior to the survey will may yield more valuable results as they would have experienced a greater impact of the TOU rate.

In early August, SDG&E PCT vendor, Ecobee, notified SDG&E that the smart thermostats installed as part of this PCT pilot were not operating with the Peak Relief functionality designed to help customers optimize the TOU rates. While issues were identified during the installation of the thermostats, resolutions appeared to be identified and SDG&E believed the thermostats were operating with Peak Relief, as intended. However, in mid-July it was determined that there were issues and Ecobee began pushing request to customers to update the thermostat firmware to Eco+. The notification occurred through the thermostats as well as through email notifications. Additional notifications were sent in August to customers who had not upgraded their devices with the new firmware. The final number of customers who updated to the Eco+ firmware was 39 of the 49 thermostats installed.

SDG&E and the IOUs have been working with the pilot evaluator to adjusted survey questions to address the PCT issues. The survey is currently under review by the IOUs and is expected to be sent to customers at the end of November, with final surveys towards the end of 2019, or early 2020.

2. CARE EXECUTIVE SUMMARY

2.1 CARE Program Summary

2.1.1 Please provide CARE Program summary costs.

CARE Budget Categories	Authorized Budget[6]	Actual Expenses to Date	% of Budget Spent
Outreach	3,221,952	2,164,924	67%
Proc., Certification and Verification	512,090	529,424	103%
Post Enrollment Verification	360,066	215,785	60%
Information Tech./Programming	1,638,000	905,399	55%
Pilots-CHANGES	265,103	253,128	95%
Regulatory Compliance	348,031	167,974	48%
General Administration	781,092	393,699	50%
CPUC Energy Division Staff	57,279	55,959	98%
Cooling Centers	43,500	16,123	37%
Total Expenses	**7,227,114**	**4,702,415**	**65%**
Subsidies and Benefits	73,833,173	98,580,510	134%
Total Program Costs and Discounts	**81,060,287**	**103,282,925**	**127%**

2.1.2 Provide the CARE Program penetration rate to date.

CARE Penetration		
Participants Enrolled	Eligible Participants[7]	Penetration rate
298,972	319,125	94%

[6] Budget authorized in CPUC approval of SDG&E Advice Letter 3250-E/2688-G dated December 27, 2018 for program years 2019 and 2020

[7] On February 12, 2019, Pacific Gas and Electric Company (PG&E), on behalf of the IOUs filed the Annual Estimates of CARE Eligible Customers and Related Information. This number reflects SDG&E's CARE Eligible Participants for 2019. As reflected in filing A.14-11-007, et al., Annual CARE Eligibility Estimates.

2.2 Outreach

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

In October 2019, marketing and outreach efforts generated 6,596 completed CARE applications, and 2,590 new enrollments/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

In October 2019, SDG&E continued its rate comparison campaign by mailing a comparison letter to 5,384 potential CARE customers. The letter compares a customer's yearly total 2018 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 2,590 CARE automated phone enrollments and online enrollments.

Email

In October 2019, 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. In October, the campaign was sent to 50,231 customers and generated a 41% open rate and a 10% click through rate over the course of the month.

SDG&E also sent recertification reminder emails to 4,334 CARE customers who were due to recertify within the next 60 days. SDG&E received an open rate of 58% for these emails, with a click through rate of 42%.

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

CARE Partners (Capitation Agencies)

SDG&E partners with 19 social service 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 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, the following numbers were generated by the Capitation Agencies:

Capitation Agencies	
ESA Leads	188
CARE Enrollments	278
CARE Recerts	192

Cool Zones

SDG&E partners with the County of San Diego's Aging & Independent Services to promote 116 county facilities that customers can visit to beat the heat in extreme hot weather conditions during the months of May through October each year. In October, the last month of the Cool Zone Season, there were 16 informational events reaching over 600 people. The County of San Diego's Aging & Independent Services handled 278 Cool Zone calls and distributed 192 fans.

Women's Infant & Children Organizations

Although there were no WIC events in October, SDG&E's Customer Solutions team works with the WIC organizations to provide training, which included training for case workers on the CARE and FERA programs.

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 October 2019, the following applications were received:

HHSA	October	YTD
ESA Leads	0	0
CARE Enrollments	35	427
CARE Recerts	44	526

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.

In October 2019, SDG&E did not receive any customer complaints regarding CARE recertification.

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 2019 and Table 11 information for the month of August and September 2019. October 2019 activity for Table 10 and Table 11 will be reported in a subsequent report.[8]

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

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

Energy Savings Assistance Program Table 1 - Expenses
SDG&E
October 2019

	Authorized Budget [1] [2]			Current Month Expenses [3]			Year to Date Expenses			% of Budget Spent YTD		
ESA Program:	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**
Energy Efficiency												
Appliances	$ 882,134	$ 330,261	$ 1,212,395	$ 146,606	$ -	$ 146,606	$ 1,025,219	$ -	$ 1,025,219	116%	0%	85%
Domestic Hot Water	$ 63,436	$ 2,051,084	$ 2,114,520	$ 2,874	$ 92,931	$ 95,805	$ 28,116	$ 909,088	$ 937,204	44%	44%	44%
Enclosure	$ 2,462,449	$ 3,264,177	$ 5,726,626	$ 114,241	$ 151,436	$ 265,677	$ 1,234,579	$ 1,636,535	$ 2,871,114	50%	50%	50%
HVAC	$ 408,617	$ 3,563,903	$ 3,972,520	$ 83,748	$ 92,770	$ 176,518	$ 386,930	$ 1,289,969	$ 1,676,899	95%	36%	42%
Maintenance	$ 6,793	$ 280,466	$ 287,259	$ -	$ 31,210	$ 31,210	$ -	$ 211,969	$ 211,969	0%	76%	74%
Lighting	$ 4,465,300	$ -	$ 4,465,300	$ 226,988	$ -	$ 226,988	$ 2,423,756	$ -	$ 2,423,756	54%	0%	54%
Miscellaneous	$ 1,699,780	$ -	$ 1,699,780	$ 46,921	$ -	$ 46,921	$ 329,805	$ -	$ 329,805	19%	0%	19%
Customer Enrollment	$ 2,091,279	$ 2,091,279	$ 4,182,557	$ 166,637	$ 166,637	$ 333,274	$ 864,277	$ 864,277	$ 1,728,554	41%	41%	41%
In Home Education	$ 331,856	$ 331,856	$ 663,712	$ 29,507	$ 29,507	$ 59,014	$ 158,264	$ 158,264	$ 316,529	48%	48%	48%
Pilot	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
			$ -	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
			$ -	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
Energy Efficiency TOTAL	**$ 12,411,644**	**$ 11,913,026**	**$ 24,324,670**	**$ 817,521**	**$ 564,491**	**$ 1,382,011**	**$ 6,450,946**	**$ 5,070,102**	**$ 11,521,049**	52%	43%	47%
Training Center	$ 244,205	$ 244,205	$ 488,411	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
Inspections	$ 88,441	$ 88,441	$ 176,882	$ 8,851	$ 8,851	$ 17,701	$ 57,329	$ 57,329	$ 114,658	65%	65%	65%
Marketing and Outreach	$ 600,000	$ 600,000	$ 1,200,000	$ 5,582	$ 5,582	$ 11,164	$ 383,914	$ 383,914	$ 767,828	64%	64%	64%
Statewide Marketing Education and Outreach	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
Studies	$ 17,083	$ 17,083	$ 34,166	$ -	$ -	$ -	$ 24,228	$ 24,228	$ 48,455	142%	142%	142%
Regulatory Compliance	$ 165,472	$ 165,472	$ 330,943	$ 9,977	$ 9,977	$ 19,953	$ 110,219	$ 110,219	$ 220,438	67%	67%	67%
General Administration	$ 1,341,766	$ 1,341,766	$ 2,683,531	$ 83,715	$ 83,715	$ 167,430	$ 975,580	$ 975,579	$ 1,951,159	73%	73%	73%
CPUC Energy Division	$ 23,409	$ 23,409	$ 46,818	$ 2,786	$ 2,786	$ 5,573	$ 11,991	$ 11,991	$ 23,983	51%	51%	51%
	$ 343,848	$ 343,848	$ 687,695	$ -	$ -	$ -			$ -	0%	0%	0%
TOTAL PROGRAM COSTS	**$ 15,235,867**	**$ 14,737,249**	**$ 29,973,116**	**$ 928,432**	**$ 675,401**	**$ 1,603,833**	**$ 8,014,208**	**$ 6,633,362**	**$ 14,647,570**	**53%**	**45%**	**49%**
Funded Outside of ESA Program Budget												
Indirect Costs				$ 46,120	$ 44,736	$ 90,856	$ 401,414	$ 394,429	$ 795,843			
NGAT Costs		$ 288,000	$ 288,000		$ 23,589	$ 23,589		$ 166,160	$ 166,160		58%	58%

[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", are reflected in ESA Table 1A.
[2] Reflects the authorized funding approved in the CPUC Energy Division Disposition Letter dated 12/27/2018 approving SDG&E Advice Letter 3250-E/2688-G.
[3] Current Month Expenses for Energy Efficiency Total includes October accrual and/or re-accrual of $ 688,754 in the following reporting categories: Appliances $10,189; Domestic Hot Water $27,125; HVAC $98,190; Misc. $40,507; Lighting $132,831; Maintenance $32,302; Enclosure $102; Customer Enrollment $295,150; In Home Energy Education $52,358.

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

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Energy Savings Assistance Program Table 1A - Expenses Funded From 2009-2016 "Unspent ESA Program Funds"
SDG&E
October 2019

	Authorized Budget [2]			Current Month Expenses			Year to Date Expenses			% of Budget Spent YTD		
ESA Program [1]:	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**
Energy Efficiency												
Multi-Family Common Area Measures	$ 1,817,500	$ 1,817,500	$ 3,635,000	$ 41,916	$ 41,916	$ 83,833	$ 191,254	$ 191,254	$ 382,508	11%	11%	11%
In-Home Education	$ 177,060	$ 177,060	$ 354,119	$ -	$ -	$ -	$ 69,145	$ 69,145	$ 138,289	39%	39%	39%
Leveraging - CSD [3]	$ 241,216	$ 241,216	$ 482,431	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
Pilot [4]	$ 50,000	$ 50,000	$ 100,000	$ -	$ -	$ -	$ 10,256	$ 10,256	$ 20,511	21%	21%	21%
Studies [5]	$ 30,625	$ 30,625	$ 61,250	$ (30)	$ (30)	$ (60)	$ 19,453	$ 19,453	$ 38,906	64%	64%	64%
Regulatory Compliance	$ 23,438	$ 23,438	$ 46,875	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
General Administration	$ -	$ -	$ -	$ -	$ -	$ -	$ 417	$ 417	$ 833	0%	0%	0%
TOTAL PROGRAM BUDGET/EXPENSES	**$ 2,339,838**	**$ 2,339,838**	**$ 4,679,675**	**$ 41,886**	**$ 41,886**	**$ 83,773**	**$ 290,524**	**$ 290,524**	**$ 581,047**	**12%**	**12%**	**12%**

[1] Add additional categories if relevant to your utility
[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. Budgets updated and approved via AL 3250-E/2688-G.
[3] Refers to budget spent supporting CSD's LIWP program
[4] Funding authorized for Programmable Communicating Thermostat (PCT) Pilot.
[5] 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 2

SDG&E

October 2019

	ESA Program (Summary)Total							ESA Program (First Touch Homes Treated)							ESA Program (Re-Treated Homes/Go Backs)							ESA Program (Aliso Canyon - SCG & SCE) [6]						
		Year-To-Date Completed & Expensed Installation							Year-To-Date Completed & Expensed Installation							Year-To-Date Completed & Expensed Installation							Year-To-Date Completed & Expensed Installation					
Measures	Units	Quantity	kWh [4] (Annual)	kW [4]	Therms [4]	Expenses ($) [7]	% of	Units	Quantity	kWh[4]	kW[4]	Therms[4]	Expenses ($)	% of	Units	Quantity	kWh[4]	kW[4]	Therms[4]	Expenses ($)	% of	Units	Quantity	kWh[4]	kW[4]	Therms[4]	Expenses	% of
Appliances		(K+S)	(L+T)	(M+U)	(N+V)	(O+W)																						
High Efficiency Clothes Washer	Each	259	1,475	-	3,902	$ 239,174	2.2%	Each	68	615	-	983	65,185	1.6%	Each	191	860	-	2,918	173,989	2.6%	Each	-	-	-	-	$ -	0.0%
Refrigerator	Each	814	504,419	60	-	$ 726,036	6.7%	Each	178	110,330	13	-	166,019	4.2%	Each	636	394,089	47	-	$ 560,017	8.2%	Each	-	-	-	-	$ -	0.0%
Microwave	Each	592	200	0	236	$ 64,779	0.6%	Each	143	-	-	24	15,497	0.4%	Each	449	200	0	212	$ 49,283	0.7%	Each	-	-	-	-	$ -	0.0%
Domestic Hot Water																												
Water Heater Blanket	Home	125	31	0	48	$ 7,205	0.1%	Home	42	12	0	16	$ 2,421	0.1%	Home	83	20	0	32	$ 4,784	0.1%	Home	-	-	-	-	$ -	0.0%
Low Flow Showerhead	Home	5,211	571	0	3,276	$ 326,699	3.0%	Home	1,586	207	0	1,043	$ 106,445	2.7%	Home	3,625	364	0	2,233	$ 220,254	3.2%	Home	-	-	-	-	$ -	0.0%
Water Heater Pipe Insulation	Home	35	0	-	1	$ 924	0.0%	Home	21	0	-	0	$ 575	0.0%	Home	14	-	-	0	$ 350	0.0%	Home	-	-	-	-	$ -	0.0%
Faucet Aerator	Home	5,614	420	0	2,554	$ 54,715	0.5%	Home	2,234	166	0	1,063	$ 21,248	0.5%	Home	3,380	254	0	1,491	$ 33,467	0.5%	Home	-	-	-	-	$ -	0.0%
Water Heater Repair/Replacement	Each	736	-	-	5,005	$ 495,493	4.6%	Each	263	-	-	1,788	$ 138,102	3.5%	Each	473	-	-	3,216	$ 357,391	5.2%	Each	-	-	-	-	$ -	0.0%
Thermostatic Shower Valve	Each	3,419	6,127	1	6,004	$ 214,029	2.0%	Each	1,317	2,484	0	2,437	$ 82,444	2.1%	Each	2,102	3,643	0	3,566	$ 131,585	1.9%	Each	-	-	-	-	$ -	0.0%
Combined Showerhead/TSV	Each	21	82	-	199	$ 1,570	0.0%	Each	4	-	-	42	$ 341	0.0%	Each	17	82	-	157	$ 1,229	0.0%	Each	-	-	-	-	$ -	0.0%
New - Heat Pump Water Heater	Each	-	-	-	-	$ -	0.0%	Each	-					0.0%	Each	-					0.0%	Each	-	-	-	-	$ -	0.0%
New - Tub Diverter/ Tub Spout	Each	16	41	0	30	$ 1,605	0.0%	Each	13	41	0	24	$ 1,204	0.0%	Each	3	-	-	6	$ 401	0.0%	Each	-	-	-	-	$ -	0.0%
New - Thermostat-controlled Shower Valve	Each							Each							Each							Each	-	-	-	-	$ -	0.0%
Enclosure																												
Air Sealing	Home	6,349	54,620	11	9,400	$ 2,643,992	24.5%	Home	2,020	26,210	6	3,192	$ 907,770	22.9%	Home	4,329	28,410	6	6,208	$ 1,736,222	25.5%	Home	-	-	-	-	$ -	0.0%
Caulking	Home	-	-	-	-	$ -	0.0%	Home						0.0%	Home						0.0%	Home	-	-	-	-		-
Attic Insulation	Home	117	2,227	0	2,920	$ 151,615	1.4%	Home	34	865	0	890	$ 44,161	1.1%	Home	83	1,362	0	2,030	$ 107,454	1.6%	Home	-	-	-	-	$ -	0.0%
HVAC																												
FAU Standing Pilot Conversion	Each	-	-	-	-	$ -	0.0%	Each	-					0.0%	Each	-					0.0%	Each	-	-	-	-	$ -	0.0%
Furnace Repair/Replacement	Each	1,490	-	-	-	$ 1,111,825	10.3%	Each	435	-	-	-	$ 408,838	10.3%	Each	1,055	-	-	-	$ 702,987	10.3%	Each	-	-	-	-	$ -	0.0%
Room A/C Replacement	Each	304	49	0	-	$ 309,786	2.9%	Each	76	25	0	-	$ 80,877	2.0%	Each	228	25	0	-	$ 228,909	3.4%	Each	-	-	-	-	$ -	0.0%
Central A/C replacement	Each	-	-	-	-	$ -	0.0%	Each	-					0.0%	Each	-					0.0%	Each	-	-	-	-	$ -	0.0%
Heat Pump Replacement	Each	-	-	-	-	$ -	0.0%	Each	-					0.0%	Each	-					0.0%	Each	-	-	-	-	$ -	0.0%
Evaporative Cooler (Replacement)	Each	-	-	-	-	$ -	0.0%	Each	-					0.0%	Each	-					0.0%	Each	-	-	-	-	$ -	0.0%
Evaporative Cooler (Installation)	Each	-	-	-	-	$ -	0.0%	Each	-					0.0%	Each	-					0.0%	Each	-	-	-	-	$ -	0.0%
Duct Test and Seal	Home	186	-	-	-	$ 28,437	0.3%	Home	83	-	-	-	$ 11,956	0.3%	Home	103	-	-	-	$ 16,481	0.2%	Home	-	-	-	-	$ -	0.0%
New - Energy Efficient Fan Control	Home	-	-	-	-	$ -	0.0%	Home	-					0.0%	Home	-					0.0%	Home	-	-	-	-	$ -	0.0%
New - Prescriptive Duct Sealing	Home	-	-	-	-	$ -	0.0%	Home	-					0.0%	Home	-					0.0%	Home	-	-	-	-	$ -	0.0%
New - High Efficiency Forced Air Unit (HE FAU)	Home	-	-	-	-	$ -	0.0%	Home	-					0.0%	Home	-					0.0%	Home	-	-	-	-	$ -	0.0%
New - A/C Time Delay	Home	-	-	-	-	$ -	0.0%	Home	-					0.0%	Home	-					0.0%	Home	-	-	-	-	$ -	0.0%
New - Smart Thermostat	Home	10	-	-	-	$ 1,860	0.0%	Home	7	-	-	-	$ 1,310	0.0%	Home	3	-	-	-	$ 550	0.0%	Home	-	-	-	-	$ -	100.0%
Maintenance																												
Furnace Clean and Tune	Home	1,955	-	-	24,043	$ 150,597	1.4%	Home	522	-	-	6,512	$ 40,588	1.0%	Home	1,433	-	-	17,532	$ 110,009	1.6%	Home	-	-	-	-	$ -	0.0%
Central A/C Tune up	Home	-	-	-	-	$ -	0.0%	Home	-					0.0%	Home	-					0.0%	Home	-	-	-	-	$ -	0.0%
Lighting																												
Interior Hardwire LED Fixtures	Each	7,052	480,735	889	(166)	$ 563,264	5.2%	Each	2,177	148,406	274	(50)	$ 173,753	4.4%	Each	4,875	332,329	614	(116)	$ 389,511	5.7%	Each	-	-	-	-	$ -	0.0%
Exterior Hard wired LED fixtures	Each	1,528	158,408	127	-	$ 105,432	1.0%	Each	624	64,690	52	-	$ 43,056	1.1%	Each	904	93,718	75	-	$ 62,376	0.9%	Each	-	-	-	-	$ -	0.0%
LED Torchiere	Each	6,966	474,872	878	(11,156)	$ 624,363	5.8%	Each	1,945	132,591	245	(3,067)	$ 174,330	4.4%	Each	5,021	342,282	633	(8,088)	$ 450,032	6.6%	Each	-	-	-	-	$ -	0.0%
Occupancy Sensor	Each	-	-	-	-	$ -	0.0%	Each	-					0.0%	Each	-					0.0%	Each	-	-	-	-	$ -	0.0%
LED Night Light	Each	5,749	6,450	1	-	$ 20,044	0.2%	Each	1,977	2,225	0	-	$ 6,945	0.2%	Each	3,772	4,225	0	-	$ 13,099	0.2%	Each	-	-	-	-	$ -	0.0%
LED Diffuse Bulb (60W Replace)	Each	57,937	830,237	82	(14,101)	$ 811,118	7.5%	Each	28,449	407,674	40	(6,669)	$ 398,286	10.0%	Each	29,488	422,563	42	(7,432)	$ 412,832	6.1%	Each	-	-	-	-	$ -	0.0%
LED Reflector Bulb (BR30 Recessed)	Each	5,640	151,586	15	(2,231)	$ 86,856	0.8%	Each	3,143	84,474	8	(1,171)	$ 48,402	1.2%	Each	2,497	67,112	7	(1,060)	$ 38,454	0.6%	Each	-	-	-	-	$ -	0.0%
New - LED Reflector Downlight Retrofit Kits	Each	-	-	-	-	$ -	0.0%	Each	-					0.0%	Each	-					0.0%	Each	-	-	-	-	$ -	0.0%
New - LED A-Lamps	Each	-	-	-	-	$ -	0.0%	Each	-					0.0%	Each	-					0.0%	Each	-	-	-	-	$ -	0.0%
Miscellaneous																												
Pool Pumps	Each	-	-	-	-	$ -	0.0%	Each	-					0.0%	Each	-					0.0%	Each	-	-	-	-	$ -	0.0%
Smart Strip	Each	2,526	61,887	-	-	$ 95,613	0.9%	Each	1,570	38,465	-	-	$ 59,429	1.5%	Each	956	23,422	-	-	$ 36,185	0.5%	Each	-	-	-	-	$ -	0.0%
Smart Strip Tier II	Each	2,722	364,476	54	(5,337)	$ 187,010	1.7%	Each	1,257	168,312	25	(2,413)	$ 86,370	2.2%	Each	1,465	196,163	29	(2,924)	$ 100,640	1.5%	Each	-	-	-	-	$ -	0.0%
Pilots																												
Customer Enrollment																												
ESA Outreach & Assessment	Home	9,710				$ 1,488,193	13.8%	Home	4,962				$ 746,917	18.8%	Home	4,748				$ 741,276	10.9%	Home	-				$ -	0.0%
ESA In-Home Energy Education	Home	9,709				$ 273,269	2.5%	Home	4,961				$ 140,072	3.5%	Home	4,748				$ 133,197	2.0%	Home	-				$ -	0.0%
Total Savings/Expenditures			3,098,913	2,118	24,626	$ 10,785,502				1,187,791	664	4,644	$ 3,972,539				1,911,122	1,453	19,982	$ 6,812,963				-	-	-	$ -	
Total Households Weatherized [2]		6,466							2,056							4,410							-					
Households Treated	Total (K+S)							First Touches							**Re-treated Homes/Go-Backs**							**Aliso Canyon**						
- Single Family Households Treated	Home	2,659						Home	1,522						Home	1,137						Home						
- Multi-family Households Treated	Home	6,358						Home	2,982						Home	3,376						Home						
- Mobile Homes Treated	Home	693						Home	458						Home	235						Home						
Total Number of Households Treated	Home	9,710						Home	4,962						Home	4,748						Home						
# Eligible Households to be Treated for PY [3]	Home	22,641						Home	11,910						Home	10,731						Home						
% of Households Treated	%	43%						%	42%						%	44%						%						
- Master-Meter Households Treated	Home	695						Home	368						Home	327						Home						

Energy Savings Assistance Program Table 2A
SDG&E
October 2019

		ESA Program - CSD Leveraging					
		Year-To-Date Completed & Expensed Installation					
Measures	**Units**	**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%
Combined Showerhead/TSV	Each	-	-	-	-	$ -	0.0%
Heat Pump Water Heater	Each	-	-	-	-	$ -	0.0%
Tub Diverter/ Tub Spout	Each	-	-	-	-	$ -	0.0%
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%
Energy Efficient Fan Control	Home	-	-	-	-	$ -	0.0%
Prescriptive Duct Sealing	Home	-	-	-	-	$ -	0.0%
High Efficiency Forced Air Unit (HE FAU)	Home	-	-	-	-	$ -	0.0%
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%
LED Diffuse Bulb (60W Replacement)	Each	-	-	-	-	$ -	0.0%
LED Reflector Bulb	Each	-	-	-	-	$ -	0.0%
LED Reflector Downlight Retrofit Kits	Each	-	-	-	-	$ -	0.0%
LED A-Lamps	Each	-	-	-	-	$ -	0.0%
Miscellaneous							
Pool Pumps	Each	-	-	-	-	$ -	0.0%
Smart Power Strips - Tier 1	Each	-	-	-	-	$ -	0.0%
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 Tenant Units Treated			**Total**				
			-				
			-				

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

[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:

Energy Savings Assistance Common Area Measures Program Table 2B
SDG&E
October 2019

	Table 2B ESA Program - Multifamily Common Area Measures[5]						
		Year-To-Date Completed & Expensed Installation					
ESA CAM Measures[1,6]	Units (of Measure such as "each")	Quantity Installed	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses ($)	% of Expenditure
Appliances							
Domestic Hot Water							
Envelope							
HVAC							
Lighting							
Miscellaneous							
Ancillary Services							
Audit[4]							
Total	-	0	0	0	0	0	

Multifamily Properties Treated	Number
Total Number of Multifamily Properties Treated[2]	
Subtotal of Master-metered Multifamily Properties Treated	
Total Number of Multifamily Tenant Units w/in Properties Treated[3]	

	Year to Date Expenses			
ESA Program - Multifamily Common Area	**Electric**	**Gas**	**Total**	
Administration				
Direct Implementation (Non-Incentive)				
Direct Implementation				*<<Includes measures costs*
TOTAL MF CAM COSTS	$ -	$ -	$ -	

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

Standard Notes 1 - 6 (do not delete)

1. Measures are customized by each IOU, see 'Table 2B-1, Eligible Measures List'. Measures list may change based on available information on both costs and benefits and may vary across climate zones. Each IOU should fill out Table 2B as it pertains to their program. Table 2B-1 Column A should match Table 2B Column A for eligible (not canceled) measures.

2. Multifamily properties are sites with at least five (5) or more dwelling units. The properties may have multiple buildings.

3. Multifamily tenant units are the number of dwelling units located within properties treated. This number does not represent the same number of dwellings treated as captured in table 2A.

4. Audit costs may be covered by other programs or projects may utilize previous audits. Not all participants will have an audit cost associated with their project.

5. Applicable to Deed-Restricted, government and non-profit owned multi-family buildings described in D.16-11-022, modified by D.17-12-009, where 65% of tenants are income eligible based (at or below 200% of the Federal Poverty Guidelines).

6. Commissioning costs, as allowable per the Decision, are included in measures total cost unless otherwise noted.

7 All savings are calculated based on the following sources:

Energy Savings Assistance CAM Program Table 2B-1, Eligible Common Area Measures List
SDG&E
October 2019

Common Area Measures Category and Eligible Measures Title [1]	Effective Date	End Date[2]	Eligible Climate Zones [3]
Appliances			
Domestic Hot Water			
Envelope			
HVAC			
Lighting			
Miscellaneous			

Standard Notes (do not delete)

1. Measures list may change based on available information on both costs and benefits (including energy benefits as well as non-energy benefits) and may vary across climate zones. This is not a list of installed measures, it is a list of eligible measures.

Table 2B-1 Column A should match Table 2B Column A for eligible (not canceled) measures.

2. Only complete if measure is canceled or discontinued

3. Defined as CEC California Building Climate Zones
https://www.energy.ca.gov/maps/renewable/building_climate_zones.html

	A	B
1	**Energy Savings Assistance Program Tables 3A-C - Energy Savings and Average Bill Savings per Treated Home/Common Area**	
2	**SDG&E**	
3	**October 2019**	
4		
5	**Table 3A-1, ESA Program**	
6	Annual kWh Savings	3,098,913
7	Annual Therm Savings	24,626
8	Lifecycle kWh Savings	44,845,971
9	Lifecycle Therm Savings	18,059
10	Current kWh Rate	$ 0.26
11	Current Therm Rate	$ 1.20
12	Average 1st Year Bill Savings / Treated households	$ 59.74
13	Average Lifecycle Bill Savings / Treated Household	$ 826.71
14		
15		
16	**Table 3A-2, 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	**Table 3A-3, Summary - ESA Program/CSD Leveraging**	
28	Annual kWh Savings	3,098,913
29	Annual Therm Savings	24,626
30	Lifecycle kWh Savings	44,845,971
31	Lifecycle Therm Savings	18,059
32	Current kWh Rate	$ 0.26
33	Current Therm Rate	$ 1.20
34	Average 1st Year Bill Savings / Treated Households	$ 59.74
35	Average Lifecycle Bill Savings / Treated Households	$ 826.71
36		
37	[1] Summary is the sum of ESA Program + CSD Leveraging	

	A	B	C	D	E	F	G
1	**Energy Savings Assistance Program Table 4 - Homes/Buildings Treated**						
2	**SDG&E**						
3	**October 2019**						
4							
5	**Table 4A-1, ESA Program**						
6		**Eligible Households**			**Households Treated YTD**		
7	**County**	**Rural [1]**	**Urban**	**Total**	**Rural**	**Urban**	**Total**
8	Orange	19,168	0	**19,168**	0	149	**149**
9	San Diego	292,139	7,818	**299,957**	236	9,325	**9,561**
10	**Total**	**311,307**	**7,818**	**319,125**	**236**	**9,474**	**9,710**
11							
12							
13	**Table 4B, ESA Program - CSD Leveraging**						
14					**Households Treated YTD**		
15	**County**				**Rural**	**Urban**	**Total**
16	Orange						**0**
17	San Diego						**0**
18	**Total**				**0**	**0**	**0**
19							
20							
21	**Table 4C, ESA Program - Multifamily Common Area**						
22					**Properties Treated YTD**		
23	**County**				**Rural**	**Urban**	**Total**
24	Orange						**0**
25	San Diego						**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 4A-2, Homes Unwilling / Unable to Participate

SDG&E

October 2019

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**
Orange	30	153	1	0	80	0	3
San Diego	7,133	7,656	26	0	7,079	699	354
Total	**7,163**	**7,809**	**27**	**0**	**7,159**	**699**	**357**

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 5 - Energy Savings Assistance Program Customer Summary
SDG&E
October 2019

Table 5A, ESA Program

Month	Gas & Electric # of Household Treated by Month	Gas & Electric (Annual) Therm	Gas & Electric (Annual) kWh	Gas & Electric (Annual) kW	Gas Only # of Household Treated by Month	Gas Only (Annual) Therm	Gas Only (Annual) kWh	Gas Only (Annual) kW	Electric Only # of Household Treated by Month	Electric Only (Annual) Therm	Electric Only (Annual) kWh	Electric Only (Annual) kW	Total # of Household Treated by Month	Total (Household Count) # of First-Tourch	Total (Household Count) # of Re-treatment	Total Therm
January	73	48	100,120	80	-	-	-	-	8	-	12,501	9	81	45	36	48
February	566	2,299	287,335	269					130	-	36,658	19	696	259	437	2,299
March	1,515	1,743	373,434	243					155	-	38,430	17	1,670	569	1,101	1,743
April	901	1,926	368,020	238					33	-	17,968	5	934	364	570	1,926
May	1,783	3,308	458,807	296					51	-	27,618	9	1,834	1,123	711	3,308
June	543	3,272	198,186	153					17	-	10,268	7	560	364	196	3,272
July	855	4,659	297,009	205					61	-	17,702	10	917	579	338	4,659
August	743	2,201	252,838	176					51	-	26,104	22	794	508	286	2,201
September	940	1,916	237,063	160					77	-	22,114	11	1,017	587	430	1,916
October	1,161	3,254	301,399	181					46	-	15,339	6	1,207	564	643	3,254
November										-			-			-
December										-			-			-
YTD	**9,080**	**24,626**	**2,874,211**	**2,003**	**-**	**-**	**-**	**-**	**629**	**-**	**224,702**	**116**	**9,710**	**4,962**	**4,748**	**24,626**

YTD Total Energy Impacts for all fuel types should equal YTD energy impacts that are reported every month Table 2.
Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

Table 5B, ESA Program - CSD Leveraging

Month	Gas & Electric # of Household Treated by Month	Gas & Electric (Annual) Therm	Gas & Electric (Annual) kWh	Gas & Electric (Annual) kW	Gas Only # of Household Treated by Month	Gas Only (Annual) Therm	Gas Only (Annual) kWh	Gas Only (Annual) kW	Electric Only # of Household Treated by Month	Electric Only (Annual) Therm	Electric Only (Annual) kWh	Electric Only (Annual) kW	Total # of Household Treated by Month	Total (Annual) Therm	Total (Annual) kWh	Total (Annual) kW
January																
February																
March																
April																
May																
June																
July																
August																
September																
October																
November																
December																
YTD	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**0**

YTD Total Energy Impacts for all fuel types should equal YTD energy impacts that are reported every month Table 2A.
Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

Table 5C, ESA Program - Multifamily Common Area

Month	Gas & Electric # of Properties Treated by Month	Gas & Electric (Annual) Therm	Gas & Electric (Annual) kWh	Gas & Electric (Annual) kW	Gas Only # of Properties Treated by Month	Gas Only (Annual) Therm	Gas Only (Annual) kWh	Gas Only (Annual) kW	Electric Only # of Properties Treated by Month	Electric Only (Annual) Therm	Electric Only (Annual) kWh	Electric Only (Annual) kW	Total # of Properties Treated by Month	Total (Annual) Therm	Total (Annual) kWh	Total (Annual) kW
January																
February																
March																
April																
May																
June																
July																
August																
September																
October																
November																
December																
YTD	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**0**

YTD Total Energy Impacts for all fuel types should equal YTD energy impacts that are reported every month Table 2B.
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	**SDG&E**												
3	**October 2019**												
4		**Authorized 2019 Funding [1]**			**Current Month Expenses**			**Year to Date Expenses**			**% of Budget Expensed**		
5		**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**
6	**Pilots**												
7	Programmable Communicating Thermostat (PCT) [2]	$ 50,000	$ 50,000	$100,000	$0	$0	$0	$10,256	$10,256	$20,511	21%	21%	21%
8													
9													
10	**Total Pilots**	**$50,000**	**$50,000**	**$100,000**	**$0**	**$0**	**$0**	**$10,256**	**$10,256**	**$20,511**	**21%**	**21%**	**21%**
11													
12													
13	**Studies**												
14	Low Income Needs Assessment Study	$ 8,334	$ 8,334	$16,667	$0	$0	$0	$9,291	$9,291	$18,582	111%	111%	111%
15	Load Impact Evaluation Study	$ 9,167	$ 9,167	$18,333	$0	$0	$0	$4,650	$4,650	$9,301	51%	51%	51%
16	Equity Criteria and Non Energy Benefits Evaluation (NEB's)	$ 2,500	$ 2,500	$5,000	$0	$0	$0	$10,286	$10,286	$20,572	411%	411%	411%
17	Unallocated Funds [3]	$ (2,917)	$ (2,917)	-$5,834	$0	$0	$0	$0	$0	$0	0%	0%	0%
18	2017 Potential and Goals Study	$ 5,625	$ 5,625	$11,250	$0	$0	$0	$0	$0	$0	0%	0%	0%
19	Rapid Feedback Research and Analysis	$ 25,000	$ 25,000	$50,000	-$30	-$30	-$60	$19,453	$19,453	$38,906	78%	78%	78%
20													
21													
22													
23	**Total Studies**	**$47,708**	**$47,708**	**$95,416**	**-$30**	**-$30**	**-$60**	**$43,681**	**$43,681**	**$87,361**	**92%**	**92%**	**92%**
24													
25	[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.												
26	[2] Programmable Communicating Thermostat (PCT) Pilot budget approved via al 3250-E/2688-G. [Table 1A].												
27	[3] 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 a specific study [Table 1].												
28													

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

SDG&E
October 2019

7A - Households Receiving Second Refrigerators			
Measures	**Units**	**Received Refrigerator**	**Not eligible for Refrigerator due to Less than Six Occupants**
Second Refrigerators	Each	1	3

7B - Households Receiving In- Home Energy Education Only		
Measures	**Units**	**Households that Only Received Energy Education**
In-Home Education	Home	0

7C - Households for My Energy/My Account Platform		
Opt-Out	**Already Enrolled**	**Opt-In**
9256	1545	455

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	**CARE Table 1 - CARE Program Expenses**												
2	**SDG&E**												
3	**October 2019**												
4		**Authorized Budget [1]**			**Current Month Expenses**			**Year to Date Expenses**			**% of Budget Spent YTD**		
5	**CARE Program:**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	**Electric [4]**	**Gas**	**Total**	**Electric**	**Gas**	**Total**
6	Outreach	$ 2,899,757	$ 322,195	$ 3,221,952	$ 14,338	$ 1,593	$ 15,932	$ 1,982,645	$ 182,280	$ 2,164,924	68%	57%	67%
7	Processing / Certification Re-certification	$ 460,881	$ 51,209	$ 512,090	$ 49,759	$ 5,529	$ 55,288	$ 484,175	$ 45,249	$ 529,424	105%	88%	103%
8	Post Enrollment Verification	$ 324,060	$ 36,007	$ 360,066	$ 19,859	$ 2,207	$ 22,066	$ 197,447	$ 18,338	$ 215,785	61%	51%	60%
9	IT Programming	$ 1,474,200	$ 163,800	$ 1,638,000	$ 46,751	$ 5,195	$ 51,945	$ 828,445	$ 76,954	$ 905,399	56%	47%	55%
10	Cooling Centers	$ 39,150	$ 4,350	$ 43,500	$ 8,891	$ 988	$ 9,879	$ 14,635	$ 1,487	$ 16,123	37%	34%	37%
11													
12	Pilots/CHANGES Program [2]	$ 238,593	$ 26,510	$ 265,103	$ 19,709	$ 2,190	$ 21,899	$ 231,038	$ 22,089	$ 253,128	97%	83%	95%
13	Studies [3]	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
14	Regulatory Compliance	$ 313,228	$ 34,803	$ 348,031	$ 32,761	$ 3,640	$ 36,401	$ 153,342	$ 14,632	$ 167,974	49%	42%	48%
15	General Administration	$ 702,983	$ 78,109	$ 781,092	$ 34,906	$ 3,878	$ 38,784	$ 359,838	$ 33,862	$ 393,699	51%	43%	50%
16	CPUC Energy Division	$ 51,551	$ 5,728	$ 57,279	$ 11,702	$ 1,300	$ 13,002	$ 51,175	$ 4,784	$ 55,959	99%	84%	98%
17													
18	**SUBTOTAL MANAGEMENT COSTS**	**$ 6,504,402**	**$ 722,711**	**$ 7,227,114**	**$ 238,676**	**$ 26,520**	**$ 265,196**	**$ 4,302,740**	**$ 399,675**	**$ 4,702,415**	**66%**	**55%**	**65%**
19													
20	CARE Rate Discount	$ 66,449,856	$ 7,383,317	$ 73,833,173	$ 9,441,340	$ 672,033	**$ 10,113,373**	$ 87,864,068	$ 10,716,442	**$ 98,580,510**	132%	145%	134%
21													
22	**TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS**	**$ 72,954,258**	**$ 8,106,029**	**$ 81,060,287**	**$ 9,680,016**	**$ 698,553**	**$ 10,378,569**	**$ 92,166,808**	**$ 11,116,117**	**$ 103,282,925**	**126%**	**137%**	**127%**
23													
24	Other CARE Rate Benefits												
25	- DWR Bond Charge Exemption				$ 510,943		$ 510,943	$ 5,177,673		$ 5,177,673			
26	- CARE Surcharge Exemption				$ 869,352	$ 57,647	$ 926,999	$ 8,772,922	$ 838,941	$ 9,611,863			
27	- California Solar Initiative Exemption				$ 14,155		$ 14,155	$ 142,938		$ 142,938			
28	- kWh Surcharge Exemption				$ 143,073		$ 143,073	$ 801,945		$ 801,945			
29	- Vehicle Grid Integration Exemption				$ 68,349		$ 68,349	$ 662,043		$ 662,043			
30	Total Other CARE Rate Benefits				**$ 1,605,872**	**$ 57,647**	**$ 1,663,519**	**$ 15,557,521**	**$ 838,941**	**$ 16,396,462**			
31													
32	Indirect Costs				$ 79,835	$ 8,871	**$ 88,706**	$ 732,217	$ 68,178	**$ 800,395**			
33													
34	[1] Reflects the authorized funding approved in the CPUC Energy Division Disposition Letter dated 12/27/2018 approving SDG&E Advice Letter 3250-E/2688-G.												
35	[2] Decision 15-12-047 transitioned CHANGES pilot to CHANGES program and funding for the effort is captured herein.												
36	[3] Reflects the Annual Eligibility Estimates prepared by Athens Research on behalf of the utilities. This effort was formerly referenced as Measurement and Evaluation.												
37	[4] Includes an increase of $77,228 for the YTD Electric portion of Total Other CARE Rate Benefits as a result of updating the month of July with actuals from Jan-Jun average calculation used in July												
38													

CARE Table 2 - Enrollment, Recertification, Attrition, & Penetration[5]
SDG&E
October 2019

	New Enrollment										Recertification				Attrition (Drop Offs)					Enrollment				
	Automatic Enrollment				Self-Certification (Income or Categorical)																			
	Inter-Utility[1]	Intra-Utility[2]	Leveraging[3]	Combined (B+C+D)	Online	Paper	Phone	Capitation	Combined (F+G+H+I)	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)	Total CARE Participants	Estimated CARE Eligible[5]	Penetration Rate % (W/X)
January	151	90	0	246	3,247	1,833	204	244	5,528	5,774	2,369	1,277	3,794	7,440	1,509	79	135	4,889	6,612	13,214	-838	293,548	319,125	92%
February	42	74	0	120	3,087	1,664	363	184	5,298	5,418	2,594	1,443	2,972	7,009	3,312	74	219	3,995	7,600	12,427	-2,182	291,924	319,125	91%
March	36	107	0	149	4,414	2,083	202	241	6,940	7,089	4,810	1,708	3,344	9,862	706	661	1,083	4,757	7,207	16,951	-118	291,637	319,125	91%
April	22	95	0	121	3,172	2,403	109	251	5,935	6,056	3,308	1,797	2,245	7,350	1,299	210	236	4,070	5,815	13,406	241	292,454	319,125	91%
May	20	85	0	108	4,047	2,201	183	258	6,689	6,797	2,692	1,506	2,806	7,004	1,723	148	182	3,933	5,986	13,801	811	293,441	319,125	91%
June	35	62	0	50	4,433	1,849	70	235	6,587	6,637	1,502	1,490	3,952	6,944	1,991	93	146	3,912	6,142	13,581	495	293,399	319,125	91%
July	19	94	0	113	5,672	2,518	224	263	8,677	8,790	2,767	2,074	3,642	8,483	1,376	71	127	5,222	6,796	17,273	1,994	295,472	319,125	92%
August	19	62	0	81	4,192	2,013	369	195	6,769	6,850	2,747	2,017	4,524	9,288	1,502	42	117	2,052	3,713	16,138	3,137	297,084	319,125	93%
September	14	66	0	80	2,960	1,075	158	122	4,315	4,395	2,085	2,087	2,937	7,109	1,619	36	77	3,620	5,352	11,504	-957	296,127	319,125	93%
October	23	115	0	138	4,126	1,932	94	213	6,365	6,503	3,296	3,738	4,030	11,064	806	74	122	2,656	3,658	17,567	2,845	298,972	319,125	94%
November																								
December																								
YTD Total	**381**	**850**	**0**	**1,206**	**39,350**	**19,571**	**1,976**	**2,206**	**63,103**	**64,309**	**28,170**	**19,137**	**34,246**	**81,553**	**15,843**	**1,488**	**2,444**	**39,106**	**58,881**	**145,862**	**5,428**	**298,972**	**319,125**	**94%**

[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.

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

CARE Table 3A - Post-Enrollment Verification Results (Model)
SDG&E
October 2019

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
January	293,548	1,234	0.4%	522	203	767	62.2%	0.3%
February	291,924	1,128	0.4%	597	125	766	67.9%	0.3%
March	291,637	1,097	0.4%	580	115	732	66.7%	0.3%
April	292,454	1,344	0.5%	709	107	865	64.4%	0.3%
May	293,441	1,072	0.4%	636	60	735	68.6%	0.3%
June	293,399	1,072	0.4%	582	72	683	63.7%	0.2%
July	295,472	1,323	0.4%	721	90	830	62.7%	0.3%
August	297,084	1,074	0.4%	111	57	168	15.6%	0.1%
September	296,127	1,333	0.5%	12	58	70	5.3%	0.0%
October	298,972	1,142	0.4%	5	11	16	1.4%	0.0%
November								
December								
YTD Total	**298,972**	**11,819**	**4.0%**	**4,475**	**898**	**5,632**	**47.7%**	**1.9%**

[1] Includes all customers who failed SDG&E's CARE eligibility probability model.
[2] Includes customers verified as over income or who requested to be de-enrolled.
[3] Verification results are tied to the month initiated and the verification process allows customers 90 days to respond to the verification
[4] Percentage of customers dropped compared to the total participants requested to provide verification in that month.
Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD

CARE Table 3B Post-Enrollment Verification Results (Electric only High Usage)
IOU NAME
MONTH YEAR

Month	Total CARE Households Enrolled	Households Requested to Verify1	% 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
January	293,548	954	0.3%	114	548	662	69.4%	0.2%
February	291,924	1,067	0.4%	571	246	817	76.6%	0.3%
March	291,637	588	0.2%	396	27	423	71.9%	0.1%
April	292,454	548	0.2%	333	34	367	67.0%	0.1%
May	293,441	187	0.1%	86	3	89	47.6%	0.0%
June	293,399	177	0.1%	77	8	85	48.0%	0.0%
July	295,472	238	0.1%	96	12	108	45.4%	0.0%
August	297,084	616	0.2%	351	25	376	61.0%	0.1%
September	296,127	1,439	0.5%	392	51	443	30.8%	0.1%
October	298,972	1,142	0.4%	0	13	13	1.1%	0.0%
November			0.0%					
December			0.0%					
YTD Total	**298,972**	**6,956**	**2.3%**	**2,416**	**967**	**3,383**	**48.6%**	**1.1%**

[1] Includes all participants who were selected for high usage verification process.
[2] Includes customers verified as over income, who requested to be de-enrolled, did not reduce usage, or did not agree to be weatherized.
[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.
[4] Percentage of customers dropped compared to the total participants requested to provide verification in that month.

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 Applications[1]**						
2	**SDG&E**						
3	**October 2019**						
4		**Provided**	**Received**	**Approved**	**Denied**	**Pending/Never Completed**	**Duplicates**
5	Total (Y-T-D)	110,675	17,351	7,462	1,476	300	8,113
6	Percentage	811	100%	43%	9%	2%	47%
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	**SDG&E**									
3	**October 2019**									
4	**County**	**Estimated Eligible Households**			**Total Households Enrolled**			**Penetration Rate**		
5		**Urban**	**Rural**	**Total**	**Urban**	**Rural**	**Total**	**Urban**	**Rural**	**Total**
6	Orange	19,168	0	19,168	12,626	0	12,626	66%	NA	66%
7	San Diego	292,139	7,818	299,957	279,980	6,366	286,346	96%	81%	95%
8	**Total**	**311,307**	**7,818**	**319,125**	**292,606**	**6,366**	**298,972**	**94%**	**81%**	**94%**
9										
10										
11										
12										
13	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	**SDG&E**							
3	**October 2019**							
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	293,548	4,687	1.6%	3,158	1,318	63.2%	0.4%
6	February	291,924	3,618	1.2%	2,503	965	66.5%	0.3%
7	March	291,637	3,673	1.3%	2,451	1,043	63.5%	0.3%
8	April	292,454	3,618	1.2%	2,539	919	69.0%	0.1%
9	May	293,441	2,827	1.0%	1,758	869	32.8%	0.0%
10	June	293,399	3,488	1.2%	2,098	916	11.4%	0.0%
11	July	295,472	3,570	1.2%	2,207	273	61.8%	0.1%
12	August	297,084	4,177	1.4%	1,423	208	34.1%	0.1%
13	September	296,127	3,882	1.3%	533	58	13.7%	0.0%
14	October	298,972	3,649	1.2%	461	5	12.6%	0.0%
15	November							
16	December							
17	**YTD**	**298,972**	**37,189**	**12.4%**	**19,131**	**6,574**	**51.4%**	**2.2%**
18								
19								
20								
21								
22								
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 Contractors[1]**						
2	**SDG&E**						
3	**October 2019**						
4	**Contractor**	**Contractor Type (Check one or more if applicable)**				**Total Enrollments**	
5							
6		**Private**	**CBO**	**WMDVBE**	**LIHEAP**		
7	211 SAN DIEGO		X			192	1,996
8	211 ORANGE COUNTY		X			0	0
9	AMERICAN RED CROSS WIC OFFICES		X	X		3	22
10	CATHOLIC CHARITIES		X			1	11
11	CHULA VISTA COMMUNITY COLLABORATIVE		X			3	31
12	COMMUNITY RESOURCE CENTER		X			0	6
13	HEARTS AND HANDS WORKING TOGETHER		X			0	0
14	HOME START		X			0	0
15	HORN OF AFRICA		X			0	0
16	INTERFAITH COMMUNITY SERVICES		X			0	7
17	LA MAESTRA FAMILY CLINIC		X			5	37
18	MAAC PROJECT		X			4	23
19	NEIGHBORHOOD HEALTH CARE		X		X	0	11
20	NORTH COUNTY HEALTH SERVICES	X				1	26
21	SAN DIEGO STATE UNIVERSITY WIC OFFICES		X			6	139
22	SAN YSIDRO HEALTH CENTERS		X			0	0
23	SCRIPPS HEALTH WIC		X			2	13
24	UNION OF PAN ASIAN COMMUNITIES SAN DIEGO(UPAC)		X			0	0
25	VISTA COMMUNITY CLINIC		X			0	1
26	**Total Enrollments**					217	2323
27							
28							
29	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 8 - Households as of Month-End**								
2	**SDG&E**								
3	**October 2019**								
4	**Month**	**Gas and Electric**	**Gas Only**	**Electric Only**	**Total**	**Eligible Households[1]**	**Penetration**	**% Change**	**Total Residential Accounts[2]**
5	January	174,138	N/A	119,410	293,548	319,125	92%	-1.3%	1,297,665
6	February	172,835	N/A	119,089	291,924	319,125	91%	-0.7%	1,298,263
7	March	172,298	N/A	119,339	291,637	319,125	91%	0.0%	1,314,244
8	April	172,606	N/A	119,848	292,454	319,125	91%	0.1%	1,339,676
9	May	173,180	N/A	120,261	293,441	319,125	91%	0.3%	1,316,214
10	June	173,094	N/A	120,305	293,399	319,125	91%	0.2%	1,340,999
11	July	174,294	N/A	121,178	295,472	319,125	93%	1.1%	1,342,216
12	August	175,204	N/A	121,880	297,084	319,125	93%	0.5%	1,343,604
13	September	174,665	N/A	121,462	296,127	319,125	93%	-0.3%	1,342,872
14	October	188,209	N/A	110,763	298,972	319,125	94%	0.9%	1,346,506
15	November		N/A						
16	December		N/A						
17	**YTD**	**188,209**	**N/A**	**110,763**	**298,972**	**319,125**	**94%**	**0.9%**	**1,346,506**
18									
19									
20									
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	**SDG&E**				
3	**October 2019**				
4	**2019**	**Authorized 2019 Budget**	**Current Month Expenses**	**Expenses Since Jan. 1, 2019**	**% of 2019 Budget Expensed**
5		**Total**	**Total**	**Total**	**Total**
6					
7					
8	CHANGES Program	$ 265,103	$ 21,899	$ 253,128	95%
9					
10					
11	**Total**	**$ 265,103**	**$ 21,899**	**$ 253,128**	**95%**
12					
13					
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 Sessions San Diego Gas & Electric	
Reporting Period September 2019[1]	
No. of attendees at education sessions	**155**
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
Enroll in Energy Assistance Programs	0
Request Meter Service or Testing	0
Request Bill Adjustment	1
Request Customer Service Visit	0
Schedule Energy Audit	0
Payment Extension	0
Payment Plan	0
Solar	0
Stop Disconnection	0
Time of Use	0
Wildfire Related Issue	0
Total disputes [3]	**1**

Needs Assistance	
Add Level Pay Plan	0
CARE Enrollment	1
Assisted with CARE Re-Certification/Audit	0
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 Allerts	0
Enrolled in Demand Response Programs	0
ESAP	0
HEAP	0
Medical Baseline	0
Neighbor to Neighbor	10
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]	**11**

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: English, Spanish

[1] There is a one-month lag behind the current reporting month. The data for October will be reported once received.
[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 2019 report.
[3] Per CHANGES Vendor: The total number of services may exceed the total number of cases because some cases will include more than one service provided.
* Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

CARE Table 11 CHANGES Group Customer Assistance Sessions

SDG&E

August & September 2019 [1,2]

Date[3]	Session Language	Description of Service Provided (e.g. utility bill assistance, utility bill dispute resolution, and other energy related issues)	Session Logistics			
			# of Sessions	Length (Hours)[4]	Number of Attendees	Description of Information / Literature Provided
N/A	Albanian	Avoiding Disconnection	1	N/A	3	CHANGES Ed Handout
N/A	ASL	Avoiding Disconnection	1	N/A	7	CHANGES Ed Handout
N/A	Arabic	Avoiding Disconnection	3	N/A	9	CHANGES Ed Handout
N/A	English	Avoiding Disconnection	3	N/A	8	CHANGES Ed Handout
N/A	Spanish	Avoiding Disconnection	1	N/A	27	CHANGES Ed Handout
N/A	Spanish	Energy Conservation	2	N/A	43	CHANGES Ed Handout
N/A	Arabic	High Energy Use	9	N/A	15	CHANGES Ed Handout
N/A	Burmese	High Energy Use	1	N/A	1	CHANGES Ed Handout
N/A	English	High Energy Use	10	N/A	23	CHANGES Ed Handout
N/A	Farsi	High Energy Use	1	N/A	3	CHANGES Ed Handout
N/A	Pashto	High Energy Use	1	N/A	2	CHANGES Ed Handout
N/A	Swahili	High Energy Use	1	N/A	2	CHANGES Ed Handout
N/A	Albanian	Understanding Your Bill	2	N/A	8	CHANGES Ed Handout
N/A	Arabic	Understanding Your Bill	64	N/A	173	CHANGES Ed Handout
N/A	Cantonese	Understanding Your Bill	1	N/A	2	CHANGES Ed Handout
N/A	Dari	Understanding Your Bill	5	N/A	14	CHANGES Ed Handout
N/A	English	Understanding Your Bill	60	N/A	117	CHANGES Ed Handout
N/A	Farsi	Understanding Your Bill	28	N/A	68	CHANGES Ed Handout
N/A	French	Understanding Your Bill	11	N/A	24	CHANGES Ed Handout
N/A	Russian	Understanding Your Bill	1	N/A	1	CHANGES Ed Handout
N/A	Somali	Understanding Your Bill	2	N/A	10	CHANGES Ed Handout
N/A	Spanish	Understanding Your Bill	4	N/A	57	CHANGES Ed Handout
N/A	Swahili	Understanding Your Bill	8	N/A	20	CHANGES Ed Handout
Current Month			220		637	
Year-to-Date			245		820	

[1] This table was provided by CHANGES contractor, Self Help for the Elderly, via CSID. This table was edited and reformatted from its original version in order to have a more consistent appearance and format with existing SDG&E tables.

[2] As of August 1st, 2019, CHANGES one-on-one data reports have moved from quarterly to monthly for the program year. The data for October 2019 will be reported once received.

[3] Date of the workshops not available.

[4] Contractor states all sessions last at least 30 minutes.

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