

**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 SEPTEMBER 2018**

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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 Date ¹	%
Budget ²	\$34,839,223	\$15,035,000	43%
Homes Treated ³	21,332	10,576	50%
kWh Saved	6,866,075	3,056,597	45%
kW Demand Reduced	2,148	1,390	65%
Therms Saved	292,308	115,477	40%
GHG Emissions Reduced (Tons)	5,486	2,357	43%

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 September.

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 September, 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 September, door-to-door canvassing from SDG&E's largest O&A contractor resulted in 1,603 ESA Program leads and 656 enrollments. Overall, ESA Program marketing, education and outreach efforts were successful in creating 4,092 leads and 1,046 enrollments for the month of September.

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 September.

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 is still working on resolving the issue and expects a resolution prior to the October report.

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, which 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. Additional details on audit and installation timelines will be available in the monthly report of October activities.

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 September, 3 customers were served by the Language Line.

Language	Calls
Arabic	1
Vietnamese	2
TOTAL	3

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 September 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 September, 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 94,908 impressions with 18,868 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 5.2 million impressions with 17,172 customers clicking through to the online application.

Social Media:

Using Facebook and Twitter channels, CARE and ESA Program messages are sent out twice a week 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 September, 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 September, 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 September generated 1,349 CARE Program enrollments, 80 CARE Program recertifications and 252 ESA Program leads.

Email:

SDG&E sent 10,047 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 course of the month, there was an average open rate of 42% and a 4% click through rate⁵.

Direct Mail

SDG&E sent an ESA Program promotional postcard to 1,229 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

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

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).

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, Twitter, and Instagram, posting information on their websites, providing booth space at events, and hosting enrollment day fairs at their locations. In September, partner outreach activities resulted in 30 ESA Program leads and 28 CARE Program enrollments and 26 CARE Program recertifications.

Partner Spotlight:

In September, the SDG&E Customer Solutions Outreach Team participated in 13 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 September, the Outreach team held an informational booth at the Latino Book and Family Festival at Mira Costa College in Oceanside, California. The event featured authors, workshops, and a variety of booths to the attendees. SDG&E featured the low-income programs which includes CARE, FERA, and ESA and other programs and services including energy conservation, My Account and

various pricing plans available to customers. The event was very well attended with over 175 people stopping at the SDG&E booth.



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 September, SDG&E's third-party outreach contractors completed 4 outreach activities. A summary of these activities is listed below:

Date	Event Title	Address	Partner
9/7/2018	Taste of Oasis	SD Oasis Learning Center 5500 Grossmont Center Drive Suite 325 La Mesa CA 91942	San Diego Oasis
9/9/2018	New Life Community Resource Fair	9255 Lamar Street Spring Valley, CA 91977	New Life
9/9/2018	Oceanside Noche Mexicana	Civic Center Plaza 300 North Coast Highway, Oceanside, CA 92054	FOPARC / Oceanside Noche Mexicana Committee
9/25/2018	Wellness Expo	Escondido Senior Center 210 E Park Ave. Escondido, CA 92025	Escondido Senior Center

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. SDG&E's Branch Offices also support efforts to enroll customers in both the CARE and ESA Programs.

In September, SDG&E's CCC generated 63 CARE Program enrollments and 32 ESA Program leads. The Branch Offices generated 463 CARE Program enrollments and 63 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.

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.

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

⁷ D.17-12-009, OP 140.

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

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.

As directed in D.16-11-022, SDG&E also enhanced the water education to customers to include shower timers, dye tabs and water displacement devices as part of the Toilet Tank Efficiency Kits.

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 September, the ESA Program coordinated with the WE&T department to provide a training for ESA Program contractors and SDG&E inspectors on Natural Gas Appliance Testing (NGAT). There was a total of 12 participants that attended the training. The training consisted of two parts, both classroom and field. Participants took a pre and post-test to assess their knowledge achieved from the NGAT training. The training was a refresher course for the existing NGAT contractor staff to make sure proper NGAT protocols and best practices are consistently practiced across contractors. The ESA contractors were also provided an overview of how properly operating appliances can provide additional energy efficiency benefits.

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 29. 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 to discuss status on the research and to plan a webinar to present the draft research plan. The webinar is scheduled for October 12.

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 will continue 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 cyber security review for the evaluator, which is likely to delay the initial data delivery date. Based on this, SDG&E anticipates a delay in the initial installation of the PCTs, which are now expected to occur in November 2018. SDG&E estimates that pilot participants to transition to the TOU rate by the end of November 2018.

2. CARE EXECUTIVE SUMMARY

2.1 CARE Program Summary

2.1.1 Please provide CARE Program summary costs.

CARE Budget Categories	Authorized Budget ⁹	Actual Expenses to Date	% of Budget Spent
Outreach	3,327,551	1,616,467	49%
Proc., Certification and Verification	507,020	419,552	83%
Post Enrollment Verification	356,501	183,347	51%
Information Tech./Programming	1,661,365	918,865	55%
Pilots-CHANGES	262,500	176,552	67%
Regulatory Compliance	247,184	239,971	97%
General Administration	819,769	293,147	36%
CPUC Energy Division Staff	56,712	27,135	48%
Cooling Centers	43,069	19,149	44%
Total Expenses	7,281,672	3,894,184	53%
Subsidies and Benefits	73,102,151	97,733,892	134%
Total Program Costs and Discounts	80,383,823	101,628,076	126%

2.1.2 Provide the CARE Program penetration rate to date.

CARE Penetration		
Participants Enrolled	Eligible Participants¹⁰	Penetration rate
290,857	321,323	91%

2.2 Outreach

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

In September 2018, marketing and outreach efforts generated 14,378 completed CARE applications, and 10,521 new enrollments and recertifications for the

⁹ 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.

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 September 2018, SDG&E continued its rate comparison campaign by mailing a comparison letter to 15,027 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 560 CARE automated phone enrollments and 2,732 online enrollments.

Email

For the month of September 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

¹⁰ 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.

reminders) over a 30-day period, depending on engagement level. The September campaign generated a 31% open rate and a 10% click through rate over the course of the month.

SDG&E also sent recertification reminder emails to 2609 CARE customers who were due to recertify within the next 60 days. SDG&E received an open rate of 60% for these emails, with a click through rate of 43%.

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 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 September, SDG&E's CARE Partners enrolled 231

customers in the CARE Program and generated 43 ESA Program leads.

Cool Zones

SDG&E partners with the County of San Diego's Aging & Independent Services to promote over 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 September 2018, the county handled 246 calls.

Women's Infant & Children Organizations

SDG&E's Customer Solutions team provided training to the Women's Infant & Children's (WIC) Organizations, (San Diego State University, American Red Cross, North Park, El Cajon) which included training for case workers on the CARE and FERA programs. A total of 0 WIC offices were visited in the month of September. The one WIC training that was scheduled for September was rescheduled for 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 September, 209 CARE applications were submitted to SDG&E resulting in 77 CARE enrollments and 104 program recertifications.

Since January, 1,525 CARE applications have been submitted resulting in 558 enrollments and 735 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 September 2018, SDG&E received one customer complaint regarding CARE recertification. The customer was deleted from the CARE Program in January 2018 due to non-response to recertification notices. The customer requested to be rebilled from January 2018 to August 2018. The customer recertified and is currently receiving the CARE discount. Advised customer that the CARE Program is on a go forward basis and provided the customer with assistance phone number.

3. CHANGES REPORTING

In compliance with requirements outlined in D.12-12-011, SDG&E has updated CARE Table 10 information for the months of June, July and August 2018. CARE Table 11 for the first quarter which covers May 1st through July 31st, 2018 has been updated.

September 2018 activity for Table 10, and Table 11 activity for August 1, 2018 through October 31, 2018, will be reported in a subsequent report.¹¹

¹¹ 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

	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	September 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	\$ 140,520	\$ -	\$ 140,520	\$ 1,366,436	\$ (81,639)	\$ 1,284,797	38%	-6%	26%
8	Domestic Hot Water	\$ 63,721	\$ 2,060,311	\$ 2,124,032	\$ 3,423	\$ 110,679	\$ 114,102	\$ 28,807	\$ 931,439	\$ 960,246	45%	45%	45%
9	Enclosure	\$ 1,917,114	\$ 2,966,933	\$ 4,884,047	\$ 139,716	\$ 185,205	\$ 324,922	\$ 1,336,822	\$ 1,772,066	\$ 3,108,889	70%	60%	64%
10	HVAC [4]	\$ 424,438	\$ 3,701,892	\$ 4,126,330	\$ 17,289	\$ 127,915	\$ 145,204	\$ 20,470	\$ 1,636,957	\$ 1,657,427	5%	44%	40%
11	Maintenance [4]	\$ 13,491	\$ 556,995	\$ 570,486	\$ -	\$ 12,704	\$ 12,704	\$ (13,176)	\$ 143,309	\$ 130,133	-98%	26%	23%
12	Lighting [5]	\$ 2,977,421	\$ -	\$ 2,977,421	\$ 384,077	\$ -	\$ 384,077	\$ 2,848,466	\$ -	\$ 2,848,466	96%	0%	96%
13	Miscellaneous	\$ 1,576,005	\$ -	\$ 1,576,005	\$ 69,552	\$ -	\$ 69,552	\$ 337,226	\$ -	\$ 337,226	21%	0%	21%
14	Customer Enrollment	\$ 2,150,145	\$ 2,150,145	\$ 4,300,290	\$ 123,365	\$ 123,365	\$ 246,730	\$ 921,420	\$ 921,420	\$ 1,842,839	43%	43%	43%
15	In Home Education	\$ 330,757	\$ 330,757	\$ 661,513	\$ 23,684	\$ 23,684	\$ 47,369	\$ 147,189	\$ 147,189	\$ 294,378	45%	45%	45%
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	\$ 901,627	\$ 583,553	\$ 1,485,180	\$ 6,993,660	\$ 5,470,741	\$ 12,464,401	54%	42%	48%
20													
21	Training Center	\$ 239,417	\$ 239,417	\$ 478,834	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
22	Inspections	\$ 86,707	\$ 86,707	\$ 173,414	\$ 3,099	\$ 3,099	\$ 6,197	\$ 45,227	\$ 45,227	\$ 90,454	52%	52%	52%
23	Marketing and Outreach	\$ 600,000	\$ 600,000	\$ 1,200,000	\$ 42,896	\$ 42,896	\$ 85,793	\$ 284,413	\$ 284,413	\$ 568,826	47%	47%	47%
24	Statewide Marketing Education and Outreach	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
25	Measurement and Evaluation Studies [6]	\$ 17,083	\$ 17,083	\$ 34,166	\$ -	\$ -	\$ -	\$ 21,291	\$ 21,292	\$ 42,583	125%	125%	125%
26	Regulatory Compliance	\$ 136,982	\$ 136,982	\$ 273,964	\$ 14,078	\$ 14,078	\$ 28,156	\$ 80,038	\$ 80,037	\$ 160,075	58%	58%	58%
27	General Administration [7]	\$ 1,315,457	\$ 1,315,457	\$ 2,630,913	\$ 195,458	\$ 195,451	\$ 390,909	\$ 869,544	\$ 869,544	\$ 1,739,088	66%	66%	66%
28	CPUC Energy Division	\$ 22,950	\$ 22,950	\$ 45,900	\$ -	\$ -	\$ -	\$ 5,815	\$ 5,815	\$ 11,629	25%	25%	25%
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	\$ 1,157,158	\$ 839,077	\$ 1,996,234	\$ 8,299,988	\$ 6,777,068	\$ 15,077,056	53%	43%	48%
32	Funded Outside of ESA Program Budget												
33	Indirect Costs				\$ 46,270	\$ 44,918	\$ 91,188	\$ 324,363	\$ 318,130	\$ 642,493			
34	NGAT Costs [6]		\$ 305,000	\$ 305,000		\$ 18,369	\$ 18,369		\$ 133,457	\$ 133,457		44%	44%
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 SEPTEMBER accrual of \$933,904 in the following reporting categories: Appliances \$106,846; Domestic Hot Water \$42,672; HVAC \$75,823; Misc. \$22,104; Lighting \$219,306; Maintenance \$8,004; Enclosure \$135,133; Customer Enrollment \$274,423; In Home Energy Education \$49,593.												
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 budget.												
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
September 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			\$ -			\$ -	0%	0%	0%
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	\$ 291	\$ 291	\$ 581	\$ 2,753	\$ 2,753	\$ 5,506	5%	5%	5%
TOTAL UNSPENT PROGRAM COSTS	\$ 1,593,526	\$ 1,613,776	\$ 3,207,302	\$ 291	\$ 291	\$ 581	\$ (21,028)	\$ (21,028)	\$ (42,056)	15%	15%	15%

[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
September 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
September 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	
2	Bill Savings per Treated Home/Common Area	
3	San Diego Gas & Electric	
4	September 2018	
5	ESA Program	
6	Annual kWh Savings	3,056,597
7	Annual Therm Savings	115,477
8	Lifecycle kWh Savings	34,798,606
9	Lifecycle Therm Savings	1,256,437
10	Current kWh Rate	\$ 0.17
11	Current Therm Rate	\$ 0.63
12	Average 1st Year Bill Savings / Treated households	\$ 55.79
13	Average Lifecycle Bill Savings / Treated Household	\$ 586.06
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	3,056,597
40	Annual Therm Savings	115,477
41	Lifecycle kWh Savings	34,798,606
42	Lifecycle Therm Savings	1,256,437
43	Current kWh Rate	\$ 0.17
44	Current Therm Rate	\$ 0.63
45	Average 1st Year Bill Savings / Treated households and Buildings	\$ 55.79
46	Average Lifecycle Bill Savings / Treated Household and Buildings	\$ 586.06
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	September 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	768	768
9	SAN DIEGO	7,533	305,205	312,738	361	9,447	9,808
10	Total	7,533	324,563	332,096	361	10,215	10,576
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
September 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	19,667	223	0	0	7,492	662	265
ORANGE	273	4	0	0	361	1	4
Total	19,940	227	0	0	7,853	663	269

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	September 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	132,631	16	-	-	-	9	-	7,009	1	56	2,728	139,640	17	
14	July	532	6,271	227,160	26	-	-	-	35	-	12,705	2	567	6,271	239,864	28	
15	August	501	5,226	242,100	27	-	-	-	124	-	16,882	1	625	5,226	258,982	28	
16	September	441	2,663	270,453	28	-	-	-	33	-	8,603	1	474	2,663	279,055	29	
17	October	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
18	November	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
19	December	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
20	YTD	9,550	115,477	2,807,282	1,335	-	-	-	1,026	-	249,315	56	10,576	115,477	3,056,597	1,390	
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	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
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	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
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	September 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	\$0	\$0	\$0	\$21,291	\$21,292	\$42,583	206%	206%	206%
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	\$0	\$0	\$0	\$21,291	\$21,292	\$42,583	50%	50%	50%
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
September 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
5,648	1,307	75

CARE Table 2 - Enrollment, Recertification, Attrition, & Penetration⁵
San Diego Gas & Electric
September 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%	
June⁶	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	0					0	0				0					0	0	0				
November			0	0					0	0				0					0	0	0				
December			0	0					0	0				0					0	0	0				
YTD Total	1	1,463	0	1,464	35,635	10,004	3,304	2,530	51,473	52,937	18,682	22,078	30,613	71,373	12,899	536	854	30,019	44,308	124,310	8,629	290,857	321,323	91%	

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.
⁶ In June, the Total CARE Participants count decreased due to an issue with a new system implementation that affected application processing and customer updates. The root cause has been identified and resolved.
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	September 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	281,648	1,590	0.6%	461	114	575	36.2%	0.2%
6	February	281,695	816	0.3%	290	40	330	40.4%	0.1%
7	March	282,947	965	0.3%	311	65	66	6.8%	0.0%
8	April	282,490	937	0.3%	429	65	494	52.7%	0.2%
9	May	284,328	1,013	0.4%	525	82	607	59.9%	0.2%
10	June	277,065	1,035	0.4%	276	54	330	31.9%	0.1%
11	July	285,736	1,068	0.4%	0	56	56	5.2%	0.0%
12	August	287,678	1,048	0.4%	0	14	14	1.3%	0.0%
13	September	290,857	1,056	0.4%	0	1	1	0.1%	0.0%
14	October								
15	November								
16	December								
17	YTD Total	290,857	9,528	3.3%	2,292	491	2,473	26.0%	0.9%
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	September 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	430	0.2%	278	28	306	71.2%	0.1%
30	February	281,695	414	0.1%	275	22	297	71.7%	0.1%
31	March	282,947	220	0.1%	115	15	130	59.1%	0.0%
32	April	282,490	307	0.1%	168	8	176	57.3%	0.1%
33	May	284,328	164	0.1%	68	5	73	44.5%	0.0%
34	June	277,065	187	0.1%	80	5	85	45.5%	0.0%
35	July	285,736	178	0.1%	78	8	86	48.3%	0.0%
36	August	287,678	3,385	1.2%	0	27	27	0.8%	0.0%
37	September	290,857	5,518	1.9%	0	9	9	0.2%	0.0%
38	October								
39	November								
40	December								
41	YTD Total	290,857	10,803	3.7%	1,062	127	1,189	11.0%	0.4%
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)	1,674,575	119,562	90,978	17,788	505	10,291
6	Percentage		100%	76%	15%	0%	9%
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	September 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	11,686	0	11,686	65%	0%	65%
7	San Diego	295,928	7,346	303,274	273,115	6,056	279,171	92%	82%	92%
8	Total	313,977	7,346	321,323	284,801	6,056	290,857	91%	82%	91%
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	September 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							
15	November							
16	December							
17	YTD	290,857	23,849	8.2%	13,475	2,747	56.5%	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	September 2018						
4	Contractor	Contractor Type (Check one or more if applicable)				Total Enrollments	
5		Private	CBO	WMDVBE	LIHEAP	Current Month	Year-to-Date
6							
7	211 SAN DIEGO (SD)		X			186	1,415
8	ALLIANCE FOR AFRICAN ASSISTANCE		X			0	9
9	AMERICAN RED CROSS WIC		X	X		5	46
10	CHULA VISTA COMM COLLABORATIVE		X			3	28
11	COMMUNITY RESOURCE CENTER - 2010		X			0	2
12	DEAF COMMUNITY SERVICES		X			0	0
13	HEARTS AND HANDS TOGETHER		X			0	1
14	INTERFAITH COMMUNITY SERVICES		X			0	4
15	LA MAESTRA FAMILY CLINIC (LMFC)		X			8	40
16	MAAC PROJECT - CARE		X		X	4	47
17	NEIGHBORHOOD HEALTH CARE		X			2	9
18	NEIGHBORHOOD HEALTH INSURANCE CENTER	X				0	1
19	NORTH COUNTY HEALTH SERVICES		X			4	70
20	SAN DIEGO STATE UNIVERSITY WIC		X			6	26
21	SAN YSIDRO HEALTH CENTERS		X			9	111
22	SCRIPPS HEALTH WIC (SHW)		X			4	13
23	UNION OF PAN ASIAN COMMUNITIES (UPAC)		X			0	0
24	VISTA COMMUNITY CLINIC		X			0	7
25	Total Enrollments					231	1,829
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	September 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								
15	November								
16	December								
17	YTD	187,148	N/A	103,709	290,857	321,323	91%	1.0%	1,290,427
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	September 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	\$ 176,552	67%
9					
10					
11	Total	\$ 262,500	\$ 21,875	\$ 176,552	67%
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 San Diego Gas & Electric Reporting Period June 2018	
No. of attendees at education sessions	198
Disputes	
Add Level Pay Plan	0
Assisted with CARE Re-Certification/Audit	0
Changed 3 rd party Company/Gas Aggregation	0
Changed 3 rd Party Electricity Aggregation	0
Medical Baseline Application	1
Refer to Energy Assistance Programs	1
Request Meter Service or Testing	0
Request Bill Adjustment	0
Request Customer Service Visit	0
Schedule Energy Audit	0
Payment Extension	0
Payment Plan	0
Solar	0
Stop Disconnection	1
Time of Use	0
Wildfire Related Issue	0
Total disputes	3
Customers receiving Needs Assistance [1]	10

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, Spanish, Swahili

[1] 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 September 2018 report.

* 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 San Diego Gas & Electric Reporting Period July 2018	
No. of attendees at education sessions	208
Disputes	
Add Level Pay Plan	0
Assisted with CARE Re-Certification/Audit	0
Changed 3 rd party Company/Gas Aggregation	0
Changed 3 rd Party Electricity Aggregation	0
Medical Baseline Application	0
Refer to Energy Assistance Programs	0
Request Meter Service or Testing	0
Request Bill Adjustment	0
Request Customer Service Visit	0
Schedule Energy Audit	0
Payment Extension	0
Payment Plan	0
Solar	0
Stop Disconnection	1
Time of Use	0
Wildfire Related Issue	0
Total disputes	1
Customers receiving Needs Assistance [1]	9

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, Spanish

[1] 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 September 2018 report.

* 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 San Diego Gas & Electric Reporting Period August 2018¹	
No. of attendees at education sessions	407
Disputes	
Add Level Pay Plan	0
Assisted with CARE Re-Certification/Audit	0
Changed 3 rd party Company/Gas Aggregation	0
Changed 3 rd Party Electricity Aggregation	0
Medical Baseline Application	0
Refer to Energy Assistance Programs	1
Request Meter Service or Testing	1
Request Bill Adjustment	0
Request Customer Service Visit	0
Schedule Energy Audit	0
Payment Extension	0
Payment Plan	0
Solar	0
Stop Disconnection	2
Time of Use	0
Wildfire Related Issue	0
Total disputes	4
Customers receiving Needs Assistance [2]	15

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, Somali, English, Spanish, Swahili

[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 September 2018 report.

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

