

**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 2019**

EDWARD L. HSU

Attorney for:

SAN DIEGO GAS & ELECTRIC COMPANY

555 West 5th Street, GT14E7

Los Angeles CA 90013

Telephone: (213) 244-8197

Facsimile: (213) 629-9620

E-Mail: ehsu2@semprautilities.com

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San Diego Gas & Electric Company

Energy Savings Assistance Program (ESA) Program

And

California Alternate Rates for Energy (CARE)

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ENERGY SAVINGS ASSISTANCE PROGRAM MONTHLY REPORT

1. ESA PROGRAM EXECUTIVE SUMMARY

1.1 ESA Program Overview

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

ESA Program Summary through September 2019			
	2019 Authorized / Planning Assumptions	Actual to Date ¹	%
Budget ²	\$34,652,791	13,541,011	39%
Homes Treated ³	22,641	8,503	38%
kWh Saved	6,880,000	2,782,175	40%
kW Demand Reduced	3,954	1,931	49%
Therms Saved	400,000	21,371	5%
GHG Emissions Reduced (Tons)	6,124	1,706	28%

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 California Department of Community Services and Development (CSD) leveraging and multifamily common area measure installations. Through July, there has been no 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 September, door-to-door canvassing from SDG&E's largest O&A contractor resulted in 1,053 ESA Program leads and 1,044 enrollments. Overall, ESA Program marketing, education and outreach efforts were successful in creating 5,141 leads and 1,362 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. In September, the ESA Program did not receive a list of participants from the SASH Program. SDG&E is currently working with GRID to improve and streamline data sharing, in an effort to make this initiative more successful.

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. In September, SDG&E had a delay in providing GRID Alternatives with leads for this effort. A total of nine leads for September will be provided to GRID Alternatives in October.

ESA Program Multifamily Common Area Measure (MF CAM) Initiative

In September 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 September, SDG&E's CAM implementer completed measures installations at five qualified properties; funds spent will be billed in October and should appear in the October monthly report. There are a total of seven properties pending Energy Assessments/Audits. In addition, Willdan Energy has identified other potential properties that have been scheduled for assessments in the month of September 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 September, 10 customers were served by the Language Line.

Language	Calls
Arabic	3
Vietnamese	5
Farsi	1
Burmese	1
TOTAL	10

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 September 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 September, paid search advertising garnered 43,156 impressions with 9,148 customers clicking through to the CARE/ESA Programs online enrollment application. Banner ads contributed 2,574,000 impressions with 6,084 clicks. Paid social media garnered 433,355 impressions with 4,553 clicks. Pre-roll video contributed 668,530 impressions with 1,316 clicks.



Social Media:

Using e-newsletters, website posts and social media channels, the Energy Solutions Partner Network shared 15 CARE and ESA Program messages to an audience of more than 19,000 followers. SDG&E's social media profile also posts messaging to an audience of more than 48,000 followers. These followers a

re then able to redistribute the messages to their own networks on social media.

 **SDHF** @SDHFTweets · Sep 13

30% off your energy bill can help you rest a little easier. Apply for SDG&E's bill-relief program and you could save 30% or more on your monthly energy bills. Find out if you qualify at sdge.com/CARE. #energytips4u #sdge



   

 **Ramona Senior Center** @RamonaSeniors · Sep 18

Find out if your family qualifies for free energy-saving appliances, lighting, weather-stripping and more at sdge.com/ESAP or call 1-800-411-7343. #energytips4u #sdge



   

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 September 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 September 2019 generated the following numbers:

The Harris Group	
ESA Leads	0
CARE Enrollments	2358
CARE Recertifications	608

Email:

SDG&E sent 3,362 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 40.9% and a 4.22% click through rate⁵.

Direct Mail

SDG&E sent an ESA Program promotional postcard to 1,116 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 September 2019, SDG&E’s partner outreach activities resulted in the following activities:

Energy Solutions Partner Network	
ESA Leads	44
CARE Enrollments	8
CARE Recertifications	27

Partner Spotlight:

In September 2019, the SDG&E Customer Solutions Outreach Team participated in 51 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.

SDG&E and MAAC have increased their partnership efforts to promote customer assistance. On September 9 and 25, SDG&E Outreach had on-site CARE enrollment events at the LIHEAP workshops that MAAC hosts on a weekly basis. An SDG&E advisor assists and presents on energy savings, programs, and assistance. Every customer in attendance is given a CARE application and they complete it on-site. This has been a very successful effort as we are receiving 100% CARE application completion.



On September 23, 2019, a presentation was given to over 100 attendees at the Energy Innovation Center where SDG&E hosted the senior citizen volunteers from the San Diego County Airport Authority, which operates the San Diego International Airport. A presentation informing participants of Time-of-Use, Customer Assistance Programs, and other programs and services offered by the company were presented.



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 September 2019, SDG&E completed 44 outreach events. A summary of these activities is listed below:

Date	Location	Partner / Hosting Organization	Event Title
9/1/2019	2300 Block of Reo Drive Paradise Hills	Leah Creations	Reo Fest
9/4/2019	8596 Bonita Bluffs Court Spring Valley, CA 91977	Lincoln Military Housing	Community Expos
9/4/2019	Educational Cultural Complex 4343 Ocean View Blvd. San Diego, CA 92113	SDCEats	Community Health Event
9/5/2019	Goodwill 3817 Plaza Dr, Oceanside, CA 92056	Anthem Blue Cross	Resource Fair
9/5/2019	10323 Orleck Street San Diego, CA 92124	Lincoln Military Housing	Community Expos
9/6/2019	South Bay United Pentecostal Church 395 D Street Chula Vista, CA 91910	South Bay United Pentecostal Church	Community Resource Fair
9/6/2019	South Clairemont Community Park 3605 Clairemont Drive San Diego, CA 92117	Movies in the Park	Hotel Transylvania 3 Summer Vacation
9/6/2019	4s Ranch Sports Park 16118 4S Ranch Parkway San Diego, CA 92127	Movies in the Park	Incredibles 2
9/7/2019	Menghini Winery 1150 Julian Orchards Dr	Julian Chamber of Commerce	Julian Grape Stomp Festival

Date	Location	Partner / Hosting Organization	Event Title
9/7/2019	Sherman Heights Community Center 2258 Island Ave. San Diego, CA 92102	ABC Youth Foundation	Community Health Event
9/7/2019	Carmel Mt. Ranch Community Park 10152 Rancho Carmel Dr. San Diego, CA 92128	Movies in the Park	Spider-Man: Into the Spider Verse
9/7/2019	Standley Community Park 3585 Governor Dr San Diego, CA 92122	Movies in the Park	Ralph Breaks The Internet
9/7/2019	Community Park 13094 Civic Center Dr, Poway, CA 92064	Poway Chamber of Commerce	Poway Days Community Fair
9/8/2019	4126 Executive Drive La Jolla, California 92037	Jewish Family Services	Membership BBQ
9/12/2019	Bayview Hills Housing 1816 Sky Harbor Rd San Diego Ca 92139	Armed Services YMCA	The Neighborhood Exchange Event
9/12/2019	Fair@44 4350 El Cajon Boulevard San Diego, CA 92105	City Heights CDC	City Heights Street Food Fest
9/13/2019	Waterfront Park 1600 Pacific Highway San Diego, CA 92101	Movies in the Park	Beetlejuice
9/14/2019	Alpine Community Center 1830 Alpine Blvd. Alpine, CA 91901	SDGE	SDG&E Wildfire Mitigation & Resiliency Open House
9/14/2019	Stagecoach Community Park 3420 Camino de los Coches Carlsbad, CA 92009	Movies in the Park	The Sandlot
9/14/2019	Liberty Station	SDG&E	Electric Vehicle Day
9/15/2019	Oceanside Civic Center Plaza 300 North Coast Hwy. Oceanside, CA	Oceanside Noche Mexicana	Oceanside Noche Mexicana
9/16/2019	Vista Del Mar Middle School 4885 Del Sol Blvd. San Diego CA 92154	LIOB	LIOB Meeting
9/17/2019	San Marcos Senior Activity Center 111 Richmar Ave. San Marcos CA 92069	City of San Marcos	Senior Center
9/18/2019	Historic Town Center Park 31852 El Camino Real San Juan Capistrano, CA	San Juan Capistrano Chamber	San Juan Summer Nights

Date	Location	Partner / Hosting Organization	Event Title
9/18/2019	1303 Las Villas Way Escondido CA 92026	Anthem Blue Cross	Resource Fair
9/19/2019	La Maestra Community Center 4060 Fairmount Ave. San Diego, CA 92105	La Maestra	Get Healthy Resource Fair
9/20/2019	War Memorial Building (Balboa Park across from Zoo parking lot)	San Diego Senior Games	Celebration of Athletes
9/20/2019	Pantoja Park W G St. San Diego, CA 92101	Movies in the Park	Coco
9/21/2019	Boys & Girls Clubs of Oceanside 401 Country Club Lane Oceanside, CA 92054	Boys and Girls Club	Day for Kids
9/21/2019	Palomar College – Rancho Bernardo Campus 11111 Rancho Bernardo Road	RB Community Council	Safety Fair
9/21/2019	Pepper Park 3299 Tidelands Ave. National City, CA 91950	National City Chamber of Commerce	Bayside Brew and Spirits
9/21/2019	Ski Beach, Mission Bay 3099 Ingranham Street San Diego, CA 92109	PIFA	Journey Home
9/22/2019	Ski Beach, Mission Bay 3099 Ingranham Street San Diego, CA 92110	PIFA	Journey Home
9/23/2019	Stratton Apartments 3884 Caminito Aguilar San Diego, CA 92111	Wakeland HDC	Health Fair
9/24/2019	210 Park Avenue, Escondido, CA 92025	Escondido Community Wellness Expo	13th Annual Escondido Community Wellness Expo
9/26/2019	3165 Pacific Hwy. San Diego, CA 92101 - Second Floor Balcony	Port of San Diego	Health & Sustainability Fair
9/26/2019	Murphy Canyon Housing 3293 Santo Road San Diego Ca 92124	Armed Services YMCA	The Neighborhood Exchange Event
9/27/2019	Pacific Beach Elementary School 1234 Tourmaline St. San Diego CA 92109	Movies in the Park	Willie Wonka & the Chocolate Factory

Date	Location	Partner / Hosting Organization	Event Title
9/27/2019	Oasis Learning Center 5500 Grossmont Center Drive La Mesa, CA 91942	Anthem Blue Cross	Resource Fair
9/28/2019	Station # 2	Arcs and Sparks	Lakeside Fire Dept. Open House
9/28/2019	Mira Costa College 1 Barnard Drive Oceanside, CA 92056	Latino Literacy Now	Latino Book and Family Festival
9/28/2019	Felicita County Park 742 Clarence Lane Escondido, CA 92029	Movies in the Park	Beetlejuice
9/28/2019	Kimball Park 1401 National City Blvd National City, CA 91950	Movies in the Park	Hocus Pocus
9/28/2019	Memorial Park in Chula Vista: 373 Parkway Chula Vista, CA 91910	Kalusugan	Vim & Vigor Art and Wellness Festival

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

	CCC	Branch Office
ESA Leads	6	11
CARE Enrollments	7	211
CARE Recertifications	1	21

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 September, LIHEAP organizations enrolled 128 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.

SDG&E began collaboration for an upcoming training to contractors, which will occur the week of October 21, 2019. SDG&E will be offering additional Natural Gas Appliance Testing (NGAT) training to all contractors interested in participating.

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.

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 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 will be 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. The Study Team met bi-weekly during September and October to discuss status on the research and to plan a webinar to present the draft research plan. The webinar took place on October 12, 2018. During the subsequent months the study team worked with the consultant to produce a draft report and

model. Draft deliverables were provided by the consultant at the end of April 2019, and the IOUs provided extensive comments and edits on these deliverables in early May. A revised set of deliverables was delivered in May 2019; however, additional edits were requested by the IOUs. Additional review and edit periods are taking place in June and July 2019. 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. As of August, 39 of the 49 thermostats installed had been updated with the Eco+ firmware.

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 October, with final surveys towards the end of 2019.

2. CARE EXECUTIVE SUMMARY

2.1 CARE Program Summary

2.1.1 Please provide CARE Program summary costs.

CARE Budget Categories	Authorized Budget⁶	Actual Expenses to Date	% of Budget Spent
Outreach	3,221,952	2,148,993	67%
Proc., Certification and Verification	512,090	474,137	93%
Post Enrollment Verification	360,066	193,719	54%
Information Tech./Programming	1,638,000	853,453	52%
Pilots-CHANGES	265,103	231,228	87%
Regulatory Compliance	348,031	131,574	38%
General Administration	781,092	354,915	45%
CPUC Energy Division Staff	57,279	42,957	75%
Cooling Centers	43,500	6,244	14%
Total Expenses	7,227,114	4,437,219	61%
Subsidies and Benefits	73,833,173	88,467,137	120%
Total Program Costs and Discounts	81,060,287	92,904,356	115%

2.1.2 Provide the CARE Program penetration rate to date.

CARE Penetration		
Participants Enrolled	Eligible Participants⁷	Penetration rate
296,127	319,125	93%

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 September 2019, marketing and outreach efforts generated 6,340 completed CARE applications, and 2,445 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 September 2019, SDG&E continued its rate comparison campaign by mailing a comparison letter to 18,051 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 2,445 CARE automated phone enrollments and online enrollments.

Email

In September 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 September, the campaign was sent to 8,071 customers and generated a 47.9% open rate and a 13.77% click through rate over the course of the month.

SDG&E also sent recertification reminder emails to 5,140 CARE customers who were due to recertify within the next 60 days. SDG&E received an open rate of 54.2% for these emails, with a click through rate of 39.09%.

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 September, the following numbers were generated by the Capitation Agencies:

Capitation Agencies	
ESA Leads	34
CARE Enrollments	231
CARE Recerts	100

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 September, there were 25 Cool Zone informational events reaching over 800 people. The County of San Diego’s Aging & Independent Services handled 25 Cool Zone calls and distributed 14 fans.

Women’s Infant & Children Organizations

SDG&E’s Customer Solutions team provides training to the Women’s Infant & Children’s (WIC) Organizations, which included training for case workers on the CARE and FERA programs. In the month of September, there were no WIC meetings or events.

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 September 2019, the following applications were received:

HHS A	September	YTD
ESA Leads	0	0
CARE Enrollments	18	392
CARE Recerts	21	482

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 September 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 August 2019. September 2019 activity for Table 10, and Table 11 activity for August 1, 2019 through October 31, 2019, will be reported in a subsequent report.⁸

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

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

(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
September 2019**

ESA Program:	Authorized Budget [1] [2]			Current Month Expenses [3]			Year to Date Expenses			% of Budget Spent YTD		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Energy Efficiency												
Appliances	\$ 882,134	\$ 330,261	\$ 1,212,395	\$ 49,227	\$ -	\$ 49,227	\$ 878,614	\$ -	\$ 878,614	100%	0%	72%
Domestic Hot Water	\$ 63,436	\$ 2,051,084	\$ 2,114,520	\$ 2,610	\$ 84,405	\$ 87,015	\$ 25,242	\$ 816,158	\$ 841,400	40%	40%	40%
Enclosure	\$ 2,462,449	\$ 3,264,177	\$ 5,726,626	\$ 112,758	\$ 149,470	\$ 262,228	\$ 1,120,338	\$ 1,485,100	\$ 2,605,438	45%	45%	45%
HVAC	\$ 408,617	\$ 3,563,903	\$ 3,972,520	\$ (26,165)	\$ 144,486	\$ 118,321	\$ 303,182	\$ 1,197,198	\$ 1,500,381	74%	34%	38%
Maintenance	\$ 6,793	\$ 280,466	\$ 287,259	\$ -	\$ 4,199	\$ 4,199	\$ -	\$ 180,759	\$ 180,759	0%	64%	63%
Lighting	\$ 4,465,300	\$ -	\$ 4,465,300	\$ 159,993	\$ -	\$ 159,993	\$ 2,196,768	\$ -	\$ 2,196,768	49%	0%	49%
Miscellaneous	\$ 1,699,780	\$ -	\$ 1,699,780	\$ 12,541	\$ -	\$ 12,541	\$ 282,884	\$ -	\$ 282,884	17%	0%	17%
Customer Enrollment	\$ 2,091,279	\$ 2,091,279	\$ 4,182,557	\$ 24,290	\$ 24,290	\$ 48,579	\$ 697,640	\$ 697,640	\$ 1,395,280	33%	33%	33%
In Home Education	\$ 331,856	\$ 331,856	\$ 663,712	\$ 4,687	\$ 4,687	\$ 9,374	\$ 128,757	\$ 128,758	\$ 257,515	39%	39%	39%
Pilot	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
			\$ -			\$ -			\$ -	0%	0%	0%
			\$ -			\$ -			\$ -	0%	0%	0%
Energy Efficiency TOTAL	\$ 12,411,644	\$ 11,913,026	\$ 24,324,670	\$ 339,941	\$ 411,536	\$ 751,477	\$ 5,633,426	\$ 4,505,612	\$ 10,139,037	45%	38%	42%
Training Center												
Training Center	\$ 244,205	\$ 244,205	\$ 488,411	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Inspections	\$ 88,441	\$ 88,441	\$ 176,882	\$ 6,411	\$ 6,411	\$ 12,821	\$ 48,478	\$ 48,478	\$ 96,956	55%	55%	55%
Marketing and Outreach	\$ 600,000	\$ 600,000	\$ 1,200,000	\$ 89,801	\$ 89,801	\$ 179,602	\$ 378,332	\$ 378,332	\$ 756,664	63%	63%	63%
Statewide Marketing Education and Outreach	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Studies	\$ 17,083	\$ 17,083	\$ 34,166	\$ 8,420	\$ 8,420	\$ 16,839	\$ 24,228	\$ 24,228	\$ 48,455	142%	142%	142%
Regulatory Compliance	\$ 165,472	\$ 165,472	\$ 330,943	\$ 18,534	\$ 18,534	\$ 37,069	\$ 100,243	\$ 100,242	\$ 200,485	61%	61%	61%
General Administration	\$ 1,341,766	\$ 1,341,766	\$ 2,683,531	\$ 152,458	\$ 152,458	\$ 304,916	\$ 891,865	\$ 891,864	\$ 1,783,729	66%	66%	66%
CPUC Energy Division	\$ 23,409	\$ 23,409	\$ 46,818	\$ 73	\$ 73	\$ 146	\$ 9,205	\$ 9,205	\$ 18,410	39%	39%	39%
	\$ 343,848	\$ 343,848	\$ 687,695	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
TOTAL PROGRAM COSTS	\$ 15,235,867	\$ 14,737,249	\$ 29,973,116	\$ 615,638	\$ 687,233	\$ 1,302,870	\$ 7,085,776	\$ 5,957,961	\$ 13,043,737	47%	40%	44%
Funded Outside of ESA Program Budget												
Indirect Costs				\$ 41,374	\$ 41,755	\$ 83,129	\$ 355,294	\$ 349,693	\$ 704,987			
NGAT Costs		\$ 288,000	\$ 288,000		\$ 6,485	\$ 6,485		\$ 142,571	\$ 142,571		50%	50%

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

ESA Program [1]:	Authorized Budget [2]			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	\$ 1,817,500	\$ 1,817,500	\$ 3,635,000	\$ 34,762	\$ 34,762	\$ 69,524	\$ 149,337	\$ 149,337	\$ 298,675	8%	8%	8%
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	\$ 19,483	\$ 19,483	\$ 38,966	\$ 19,483	\$ 19,483	\$ 38,966	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	\$ 54,245	\$ 54,245	\$ 108,490	\$ 248,637	\$ 248,637	\$ 497,274	11%	11%	11%

[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 2A
SDG&E
September 2019

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%
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
 September 2019

Table 2B ESA Program - Multifamily Common Area Measures ⁵							
ESA CAM Measures ^{1,6}	Units (of Measure such as "each")	Year-To-Date Completed & Expensed Installation					
		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 Treated²	
Subtotal of Master-metered Multifamily Properties Treated	
Total Number of Multifamily Tenant Units w/in Properties Treated³	

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

<<Includes measures 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:

	A	B
1	Energy Savings Assistance Program Tables 3A-C - Energy Savings and	
2	Average Bill Savings per Treated Home/Common Area	
3	SDG&E	
4	September 2019	
5	Table 3A-1, ESA Program	
6	Annual kWh Savings	2,782,175
7	Annual Therm Savings	21,371
8	Lifecycle kWh Savings	40,335,656
9	Lifecycle Therm Savings	7,365
10	Current kWh Rate	\$ 0.26
11	Current Therm Rate	\$ 1.20
12	Average 1st Year Bill Savings / Treated households	\$ 61.15
13	Average Lifecycle Bill Savings / Treated Household	\$ 847.98
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	2,782,175
29	Annual Therm Savings	21,371
30	Lifecycle kWh Savings	40,335,656
31	Lifecycle Therm Savings	7,365
32	Current kWh Rate	\$ 0.26
33	Current Therm Rate	\$ 1.20
34	Average 1st Year Bill Savings / Treated Households	\$ 61.15
35	Average Lifecycle Bill Savings / Treated Households	\$ 847.98
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	September 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	153	8,201	8,354
10	Total	311,307	7,818	319,125	153	8,350	8,503
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
September 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	5,964	644	279
San Diego	6,190	6,682	24	0	55	0	3
Total	6,220	6,835	25	0	6,019	644	282

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	SDG&E																
3	September 2019																
4	Table 5A, 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	(Household Count)		Therm
7	Month		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW		# of First-Touch	# of Re-treatment	
8	January	73	48	100,120	80	-	-	-	8	-	12,501	9	81	45	36	48	
9	February	566	2,299	287,335	269	-	-	-	130	-	36,658	19	696	259	437	2,299	
10	March	1,515	1,743	373,434	243	-	-	-	155	-	38,430	17	1,670	569	1,101	1,743	
11	April	901	1,926	368,020	238	-	-	-	33	-	17,968	5	934	364	570	1,926	
12	May	1,783	3,308	458,807	296	-	-	-	51	-	27,618	9	1,834	1,126	708	3,308	
13	June	543	3,272	198,186	153	-	-	-	17	-	10,268	7	560	365	195	3,272	
14	July	855	4,659	297,009	205	-	-	-	61	-	17,702	10	917	580	337	4,659	
15	August	743	2,200	252,838	176	-	-	-	51	-	26,104	22	794	508	286	2,200	
16	September	940	1,916	237,063	160	-	-	-	77	-	22,114	11	1,017	587	430	1,916	
17	October																
18	November																
19	December																
20	YTD	7,919	21,371	2,572,812	1,822	-	-	-	583	-	209,363	109	8,503	4,403	4,100	21,371	
21	YTD Total Energy Impacts for all fuel types should equal YTD energy impacts that are reported every month Table 2.																
22	Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.																
23																	
24																	
25																	
26	Table 5B, ESA Program - CSD Leveraging																
27		Gas & Electric			Gas Only			Electric Only			Total						
28		# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Annual)		
29	Month		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW
30	January																
31	February																
32	March																
33	April																
34	May																
35	June																
36	July																
37	August																
38	September																
39	October																
40	November																
41	December																
42	YTD	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0	
43	YTD Total Energy Impacts for all fuel types should equal YTD energy impacts that are reported every month Table 2A.																
44	Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.																
45																	
46																	
47																	
48	Table 5C, ESA Program - Multifamily Common Area																
49		Gas & Electric			Gas Only			Electric Only			Total						
50		# of Properties Treated by Month	(Annual)			# of Properties Treated by Month	(Annual)			# of Properties Treated by Month	(Annual)			# of Properties Treated by Month	(Annual)		
51	Month		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW
52	January																
53	February																
54	March																
55	April																
56	May																
57	June																
58	July																
59	August																
60	September																
61	October																
62	November																
63	December																
64	YTD	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0	
65	YTD Total Energy Impacts for all fuel types should equal YTD energy impacts that are reported every month Table 2B.																
66	Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.																
67																	

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

**SDG&E
September 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
8113	1267	391

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y
1	CARE Table 2 - Enrollment, Recertification, Attrition, & Penetration⁵																								
2	SDG&E																								
3	September 2019																								
4		New Enrollment									Recertification				Attrition (Drop Offs)				Enrollment		Total CARE Participants	Estimated CARE Eligible⁵	Penetration Rate % (W/X)		
5		Automatic Enrollment				Self-Certification (Income or Categorical)					Total New Enrollment (E+J)	Scheduled	Non-Scheduled (Duplicates)	Automatic	Total Recertification (L+M+N)	No Response⁴	Failed PEV	Failed Recertification	Other	Total Attrition (P+Q+R+S)				Gross (K+O)	Net Adjusted (K-T)
6		Inter-Utility¹	Intra-Utility²	Leveraging³	Combined (B+C+D)	Online	Paper	Phone	Capitation	Combined (F+G+H+I)															
7	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%
8	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%
9	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%
10	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%
11	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%
12	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%
13	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%
14	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%
15	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%
16	October																								
17	November																								
18	December																								
19	YTD Total	358	735	0	1,068	35,224	17,639	1,882	1,993	56,738	57,806	24,874	15,399	30,216	70,489	15,037	1,414	2,322	36,450	55,223	128,295	2,583	296,127	319,125	93%
20																									
21	¹ Enrollments via data sharing between the IOUs.																								
22	² Enrollments via data sharing between departments and/or programs within the utility.																								
23	³ Enrollments via data sharing with programs outside the IOU that serve low-income customers.																								
24	⁴ No response includes no response to both Recertification and Verification.																								
25																									
26																									
27	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	SDG&E								
3	September 2019								
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	293,548	1,234	0.4%	518	158	718	58.2%	0.2%
6	February	291,924	1,128	0.4%	595	77	716	63.5%	0.2%
7	March	291,637	1,097	0.4%	565	87	689	62.8%	0.2%
8	April	292,454	1,344	0.5%	705	92	846	62.9%	0.3%
9	May	293,441	1,072	0.4%	624	54	717	66.9%	0.2%
10	June	293,399	1,072	0.4%	571	55	655	61.1%	0.2%
11	July	295,472	1,323	0.0%	123	63	205	15.5%	0.1%
12	August	297,084	1,074	0.0%	0	33	33	3.1%	0.0%
13	September	296,127	1,333	0.0%	0	10	10	0.8%	0.0%
14	October			0.0%			0	0.0%	0.0%
15	November			0.0%			0	0.0%	0.0%
16	December			0.0%			0	0.0%	0.0%
17	YTD Total	296,127	10,677	3.6%	3,701	629	4,589	43.0%	1.5%
18									
19	¹ Includes all customers who failed SDG&E's CARE eligibility probability model.								
20	² Includes customers verified as over income or who requested to be de-enrolled.								
21	³ Verification results are tied to the month initiated and the verification process allows customers 90 days to respond to the verification request.								
22	⁴ Percentage of customers dropped compared to the total participants requested to provide verification in that month.								
23	Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD								
24									
25	CARE Table 3B Post-Enrollment Verification Results (Electric only High Usage)								
26	IOU NAME								
27	MONTH YEAR								
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	293,548	954	0.3%	662	0	662	69.4%	0.2%
30	February	291,924	1,067	0.4%	815	0	815	76.4%	0.3%
31	March	291,637	588	0.2%	422	0	422	71.8%	0.1%
32	April	292,454	548	0.2%	366	0	366	66.8%	0.1%
33	May	293,441	187	0.1%	88	0	88	47.1%	0.0%
34	June	293,399	177	0.1%	86	0	86	48.6%	0.0%
35	July	295,472	238	0.0%	113	0	113	47.5%	0.0%
36	August	297,084	616	0.0%	27	0	0	0.0%	0.0%
37	September	296,127	1,439	0.0%	1	0	0	0.0%	0.0%
38	October			0.0%			0	0.0%	0.0%
39	November			0.0%			0	0.0%	0.0%
40	December			0.0%			0	0.0%	0.0%
41	YTD Total	296,127	5,814	2.0%	2,580	0	2,552	43.9%	0.9%
42									
43	¹ Includes all participants who were selected for high usage verification process.								
44	² Includes customers verified as over income, who requested to be de-enrolled, did not reduce usage, or did not agree to be weatherized.								
45	³ Medium (400%) and high usage (600%) customers are dropped at 60 days (2 or 3 bill cycles) for non-response to HUV (high usage income verification request). Additionally, 600% + users that have not reduced usage within the 60 day window (2 or 3 bill cycles) are removed from the program. Results may be pending due to the time permitted for a participant to respond.								
46	⁴ Percentage of customers dropped compared to the total participants requested to provide verification in that month.								
47									
48	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								SDG&E						
3								September 2019						
4		Provided	Received	Approved	Denied	Pending/Never Completed	Duplicates							
5	Total (Y-T-D)	110,043	127,666	55,320	11,938	2,171	58,237							
6	Percentage		100%	43%	9%	2%	46%							
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	September 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	12,595	0	12,595	66%	NA	66%
7	San Diego	292,139	7,818	299,957	277,193	6,339	283,532	95%	81%	95%
8	Total	311,307	7,818	319,125	289,788	6,339	296,127	93%	81%	93%
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	September 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	1,369	63.2%	0.4%
6	February	291,924	3,618	1.2%	2,503	1,005	66.5%	0.3%
7	March	291,637	3,673	1.3%	2,451	1,071	63.5%	0.3%
8	April	292,454	3,618	1.2%	2,539	971	69.0%	0.1%
9	May	293,441	2,827	1.0%	1,758	901	32.8%	0.0%
10	June	293,399	3,488	1.2%	2,098	930	11.4%	0.0%
11	July	295,472	3,570	1.2%	2,207	262	61.8%	0.1%
12	August	297,084	4,177	1.4%	1,423	114	34.1%	0.0%
13	September	296,127	3,882	1.3%	533	12	13.7%	0.0%
14	October							
15	November							
16	December							
17	YTD	296,127	33,540	11.3%	18,670	6,635	55.7%	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 Contractors¹						
2	SDG&E						
3	September 2019						
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		X			112	1,706
8	211 ORANGE COUNTY		X				
9	AMERICAN RED CROSS WIC OFFICES		X	X		1	18
10	CATHOLIC CHARITIES		X			-	10
11	CHULA VISTA COMMUNITY COLLABORATIVE		X			3	25
12	COMMUNITY RESOURCE CENTER		X			-	6
13	HEARTS AND HANDS WORKING TOGETHER		X			-	-
14	HOME START		X				
15	HORN OF AFRICA		X				
16	INTERFAITH COMMUNITY SERVICES		X			-	7
17	LA MAESTRA FAMILY CLINIC		X			1	32
18	MAAC PROJECT		X			-	19
19	NEIGHBORHOOD HEALTH CARE		X		X	-	12
20	NORTH COUNTY HEALTH SERVICES	X				1	25
21	SAN DIEGO STATE UNIVERSITY WIC OFFICES		X			-	128
22	SAN YSIDRO HEALTH CENTERS		X			-	-
23	SCRIPPS HEALTH WIC		X			2	10
24	UNION OF PAN ASIAN COMMUNITIES SAN DIEGO(UPAC)		X			-	-
25	VISTA COMMUNITY CLINIC		X			-	1
26	Total Enrollments					120	1999
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	September 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		N/A						
15	November		N/A						
16	December		N/A						
17	YTD	174,665	N/A	121,462	296,127	319,125	93%	-0.3%	1,342,872
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	September 2019				
4	2019	Authorized 2019 Budget	Current Month Expenses	Expenses Since Jan. 1, 2019	% of 2019 Budget Expended
5		Total	Total	Total	Total
6					
7					
8	CHANGES Program	\$ 265,103	\$ 21,875	\$ 231,228	87%
9					
10					
11	Total	\$ 265,103	\$ 21,875	\$ 231,228	87%
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 August 2019[1]	
No. of attendees at education sessions	480
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	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	2
Time of Use	0
Wildfire Related Issue	0
Total disputes [3]	3

Needs Assistance	
Add Level Pay Plan	0
Assisted with CARE Re-Certification/Audit	0
Assisted with Changes to Account	0
Energy Efficiency Tool	0
Assisted High Energy User with CARE Doc Submissior	0
Assisted with Reconnection	0
Billing Language Changed	0
Consumer Education Only	0
Electricity Aggregation	0
Energy Alerts	0
Enrolled in Demand Response Programs	0
ESAP	0
HEAP	0
Medical Baseline	0
Neighbor to Neighbor	7
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]	7

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 September 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 September 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

Q1 May 1, 2019 - July 31, 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	Arabic	Avoiding Disconnection	4	N/A	29	CHANGES Ed Handout
N/A	English	Avoiding Disconnection	5	N/A	31	CHANGES Ed Handout
N/A	Farsi	Avoiding Disconnection	3	N/A	8	CHANGES Ed Handout
N/A	French	Avoiding Disconnection	1	N/A	5	CHANGES Ed Handout
N/A	Pashto	Avoiding Disconnection	2	N/A	2	CHANGES Ed Handout
N/A	Portuguese	Avoiding Disconnection	1	N/A	2	CHANGES Ed Handout
N/A	Spanish	Avoiding Disconnection	2	N/A	6	CHANGES Ed Handout
N/A	Swahili	Avoiding Disconnection	2	N/A	11	CHANGES Ed Handout
N/A	English	Energy Conservation	1	N/A	19	CHANGES Ed Handout
N/A	Spanish	Energy Conservation	1	N/A	30	CHANGES Ed Handout
N/A	Arabic	Understanding Your Bill	1	N/A	5	CHANGES Ed Handout
N/A	French	Understanding Your Bill	1	N/A	5	CHANGES Ed Handout
N/A	Spanish	Understanding Your Bill	1	N/A	30	CHANGES Ed Handout
Current Month			25		183	
Year-to-Date			25		183	

[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 May 1st, 2017, CHANGES one-on-one data reports have moved from monthly to quarterly for the program year. The data for Q2 August 1, 2019 through October 31, 2019 will be reported once received. Please note that this data covers June 17 - 30, 2019 and July 2019. CHANGES services were not provided from May 1 - June 16, 2019 due to a delay in contracting procedures.

[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.