

**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

**ANNUAL REPORT ACTIVITY OF SAN DIEGO GAS & ELECTRIC COMPANY
(U 904 M) ON LOW INCOME ASSISTANCE PROGRAMS FOR 2017**

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May 1, 2018

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This report presents the results and expenditures for San Diego Gas & Electric Company's (SDG&E's) California Alternate Rates for Energy (CARE) Program and Energy Savings Assistance (ESA) program year 2017. The purpose of this report is to consolidate activity for the CARE and ESA Programs, and provide the California Public Utilities Commission's (Commission's) Energy Division with all the necessary information to analyze SDG&E's low-income programs.

Respectfully Submitted,

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SAN DIEGO GAS & ELECTRIC COMPANY

ANNUAL REPORT ACTIVITY ON LOW INCOME ASSISTANCE PROGRAMS

2017 RESULTS

LOW INCOME ASSISTANCE PROGRAMS ANNUAL REPORT

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ENERGY SAVINGS ASSISTANCE PROGRAM ANNUAL REPORT

1. ENERGY SAVINGS ASSISTANCE PROGRAM EXECUTIVE SUMMARY

San Diego Gas & Electric Company's (SDG&E) Energy Savings Assistance (ESA) Program¹ offers its low income natural gas and electric customers weatherization services, energy efficient lighting, energy efficient appliances, energy education, and other services at no cost. In recognition of the changes in the energy markets and the environment, as well as the needs of low income customers and the larger community, the California Public Utilities Commission (Commission) updated its policy objectives for the ESA Program in Decision (D.) 07-12-051, stating:

[T]he key policy objective for the LIEE programs, like that of our non-LIEE energy efficiency programs, is to provide cost-effective energy savings that will serve as an energy resource and to promote environmental benefits. We retain our commitment to ensuring the LIEE programs add to the participant's quality of life, which implicates equity, energy affordability, bill savings, and safety and comfort for those customers who participate in the LIEE programs.²

To achieve these objectives, the Commission adopted an ESA Program initiative "to provide all eligible LIEE customers the opportunity to participate in LIEE programs and to offer those who wish to participate, all cost-effective energy efficiency measures in their residences by 2020."³

The long-term California Energy Efficiency Strategic Plan (Strategic Plan) lays out two goals in achieving the vision: 1) by 2020, all eligible customers will be given the opportunity to

¹ The Energy Savings Assistance Program was formerly known as the Low-Income Energy Efficiency Program or "LIEE".

² D. 07-12-051 at p. 2.

³ *Id.*

participate in the ESA Program; and 2) the ESA Program will be an energy resource by delivering increasingly cost effective and longer-term savings.

On March 28, 2014, Southern California Edison Company filed a Motion on behalf of itself and other interested parties, requesting an extension of time for the large investor-owned utilities to file their 2015-2017 Applications until January 30, 2015⁴ and requesting a one-year bridge funding period.⁵ The Motion stated that Bridge funding will afford the investor-owned utilities (IOUs) sufficient time to incorporate those changes in their portfolios without putting the continuity of the ESA Program at risk. In D.14-08-030, the Commission granted the request for one-year bridge funding for program year 2015 to minimize disruption to the ESA and CARE Programs and to allow administrative flexibility to meet any unforeseen program needs during the bridge period, subject to the Commission's adopted fund shifting rules. The IOUs were directed to treat 2015 as the fourth program year and continuation of the 2012-2014 program cycle for fund shifting purposes.⁶

As directed in D.14-08-030, SDG&E filed its Application for the 2015-2017 program cycle on November 18, 2014. The funding for the 2015 program cycle was authorized in D.14-08-030. The Commission also issued D.15-12-024 and D.16-06-018, interim decisions for

⁴ Contingent on a Final Commission Decision on Phase II of the issues in A. 11-05-007, et. al. by no later than October 1, 2014.

⁵ Southern California Edison Company's (U338-E) Motion For An Extension Of Time To File Energy Savings Assistance and California Alternate Rates for Energy Programs and Budgets Applications for the Next Program Cycle and for a 2015 Bridge Funding Period, filed on behalf of Pacific Gas and Electric Company (PG&E), Southern California Gas Company (SoCalGas), San Diego Gas & Electric Company (SDG&E), Natural Resources Defense Council (NRDC), The Utility Reform Network (TURN), Office of Ratepayer Advocates, (ORA), Proteus Incorporated (Proteus), The East Los Angeles Community Union (TELACU), Energy Efficiency Council (EEC), Maravilla Foundation, and the Association of California Community and Energy Services (ACCES) (collectively Joint Parties).

⁶ D.14-08-030, Ordering Paragraph 3.

program year 2016 to authorize bridge funding until such time a final decision is rendered by the Commission.

On November 21, 2016 the Commission issued D.16-11-022 which approved SDG&E's Low-Income Application (A.) 14-11-009 filed on November 18, 2014. D.16-11-022 set forth the parameters for the administration of and participation in the ESA and CARE Programs for years 2017 through 2020. The Commission extended the program cycle for these programs from 2017 through 2020 considering the delays resulting in bridge funding decisions, the significant program changes adopted in D.16-11-022, and the changes in electric rate structure as default Time of Use rates are implemented.⁷

On March 24, 2017, the IOUs filed a Joint Petition for Modification (PFM) of D.16-11-022 requesting changes, corrections, and clarifications to the decision. On April 24, 2017, California Housing Partnership Corporation, the Natural Resources Defense Council, and the National Consumer Law Center filed a joint PFM recommending modifications to D.16-11-022. The Commission issued D.17-12-009 resolving the PFM of D.16-11-022 for the ESA and CARE Programs through program years 2017-2020.

This report provides information on SDG&E's ESA Program accomplishments and expenditures for program year 2017. In 2017, the ESA Program treated 21,677 homes, or 107% of the 2017 goal. The program spent \$17,854,128 of its authorized 2017 budget, plus \$142,587 from 2009-2016 unspent funds totaling \$17,996,715. At year end, there was a total of \$12,795,377 in unspent 2017 gas and electric ESA Program funds which represents \$6,746,644 unspent gas funds and \$6,048,734 unspent electric funds. These unspent funds represent authorized budget minus expenditures and does not reflect the dollars in SDG&E collections in its gas and electric

⁷ D.16-11-022, p. 6.

balancing accounts. SDG&E's collections in its ESA Program balancing accounts at 2017 year-end totaled \$28,445,505 in unspent electric and gas funds which represents \$10,693,551 over-collection unspent gas funds and \$17,751,954 over-collection unspent electric funds. Of the noted over-collection, Resolution E-4884 authorized \$12,959,793 to be utilized for specific programs above and beyond the base ESA programs. The remaining balancing account available funds total \$15,343,128 as outlined in ESA Table 12 in the attachments. D.16-11-022, as modified by D.17-12-009, directs the IOUs to use unspent ESA Program funds to achieve program and policy objectives and to offset future revenue collections.

1.1. Alignment of Energy Savings Assistance Program with Strategic Plan Goals and Strategy

The long-term Strategic Plan vision for the ESA Program is to have 100% of all eligible and willing low-income customers receive all cost-effective ESA Program measures by 2020. The Strategic Plan lays out two goals in achieving the ESA Program vision: 1) by 2020, all eligible customers will be given the opportunity to participate in the ESA Program, and 2) the ESA Program will be an energy resource by delivering increasingly cost-effective and longer-term savings.

In addition to the goals to serve all eligible customers by 2020, D.17-12-009 authorized changes to the ESA Program design to allow more flexibility to accomplish ESA Program statutory goals and “reduce hardship on low-income customers in a cost-effective manner.”⁸ The changes included the inclusion of energy savings targets, the elimination of the three-measure minimum (3MM) rule, the elimination of the go-back rule, removal of measure caps, authorization to leverage the California Department of

⁸ D.17-12-009, page 6.

Community Services & Development (CSD) multifamily in-unit with ESA Program funds, and the authorization of treating common areas of eligible deed-restricted multifamily properties.

1.1.1. Please identify the IOU strategies employed in meeting Goal 1: Improve Customer Outreach.

In the table immediately following, SDG&E has provided the activity for 2017 based upon the Strategic Plan update in 2011 to reflect the long-term strategy implementation plan and timeline.

Implementation Plan and Timeline		
Strategies	Term 2017-2020	IOU strategy employed this program year
1: Strengthen program outreach using segmentation analysis and social marketing tools.	<ul style="list-style-type: none"> Continue to assess and evaluate customer behavior and energy savings; improve upon outreach to eligible communities. 	<ul style="list-style-type: none"> Use a coordinated and integrated mix of general awareness channels, targeted campaigns, and collaborative partnerships. Promote ESA as the secondary or next best offer to qualifying CARE customers. As part of the in-home assessment, customers take part in energy education. The energy education booklet continues to be used as a tool for this process. The leave-behind booklet includes information on energy costs and behavioral changes that can lead to a reduction in energy and water costs. It also includes appliance safety tips and information. The booklet is available in both English and Spanish versions. In 2017, SDG&E developed a My Account fact sheet providing information about viewing their online energy use and rate reduction opportunities.

Implementation Plan and Timeline		
Strategies	Term 2017-2020	IOU strategy employed this program year
1.2: Develop a recognizable and trustworthy Brand/Tagline for the programs.	<ul style="list-style-type: none"> Evaluate progress/refine strategy. 	<ul style="list-style-type: none"> The development of the statewide program name was completed during the 2009-2011 program cycle. In 2011, the Commission directed the investor-owned utilities (IOUs) to commence using the new program name now known as the Energy Savings Assistance Program. Assigned Commissioner Ruling issued October 13, 2011 directed the IOUs to cease Engage 360 statewide branding efforts. D.12-05-015, the Guidance Decision, directed the utilities to discontinue the use of the Engage 360 brand and to develop a strategy and budget for transitioning toward the use of “Energy Upgrade California” (EUC) as a statewide umbrella brand. It also directed the utilities to utilize unspent funds from the Engage 360 campaign toward expenditures for EUC ME&O, web portal maintenance, and limited augmentation of programs related to EUC during 2012. There was no Commission activity on this strategy during 2017.
1.3: Improve program delivery	<ul style="list-style-type: none"> Ongoing: Use information from segmentation analysis to achieve efficiencies in program delivery. Ongoing: Leverage with Local, State, and Federal agencies as 	<ul style="list-style-type: none"> SDG&E uses the most current Athens Research data with SDG&E’s recent residential segmentation (which underwent a refresh in 2016) to identify high opportunity areas to target for outreach efforts. In conjunction with direct marketing tactics, SDG&E also identifies high population density of targeted

Implementation Plan and Timeline		
Strategies	Term 2017-2020	IOU strategy employed this program year
	well as other organizations to increase seamless coordination, efficiency and enrollment.	<p>audiences (i.e., seniors) by zip code and targeted customers within these opportunity areas (in particular the hard to reach customers) through Community based outreach activities.</p> <ul style="list-style-type: none"> SDG&E partners with local agencies who provide outreach services for a large variety of Federal, State and local agencies, leveraging opportunities to enroll eligible customers in ESA, CARE, FERA, and Medical Baseline Allowance (MBL) programs.
1.4: Promote the growth of a trained ESA Program workforce.	<ul style="list-style-type: none"> Implement ESA Program workforce education and training. Coordinate ESA Program workforce and service providers with broader market. 	<ul style="list-style-type: none"> SDG&E, in coordination with the IOUs, began developing an ESA Program workforce training manual and energy education materials in mid-2017. The intent is to provide consistent ESA Program delivery statewide. The IOUs anticipate implementation of the statewide In-Home Education booklet in mid-2018 and statewide training by January 2019. Monthly opportunities are available for contractors through SDG&E's Workforce Education and Training (WE&T) programs. SDG&E provides ESA Program contractors with notices of relevant trainings they may benefit from throughout the year.

**1.1.2. Please identify the IOU strategies employed in meeting Goal 2:
Energy Savings Assistance Program is an Energy Resource**

In the table immediately following, SDG&E has provided the activity for 2017 based upon the Strategic Plan update in 2011 to reflect the long-term strategy implementation plan and timeline.

Implementation Plan and Timeline		
Strategies	Term 2017 – 2020	IOU strategy employed this program year
2.1: Increase collaboration and leveraging of other low income programs and services	<ul style="list-style-type: none"> Continue to expand partnerships with stakeholders and seek new opportunities for data sharing. 	<ul style="list-style-type: none"> SDG&E partnered with local LIHEAP agencies to improve leveraging efforts by expanding the agency's contracts to include Outreach and Assessment (O&A). Additionally, SDG&E worked with CSD to begin developing a structure for leveraging opportunities for homes being treated by the Low-Income Weatherization Program (LIWP). Additional information on the summaries above can be found in section 1.6.3.
2.2: Coordinate and communicate between ESA Program, energy efficiency and DSM Programs to achieve service offerings that are seamless for the customer.	<ul style="list-style-type: none"> Continually reevaluate and update programs to take advantage of new technologies. 	<ul style="list-style-type: none"> ESA partners with SDG&E's Energy Efficiency (EE) and Demand Response (DR) programs to identify opportunities to integrate new measures into the program. In 2017, SDG&E integrated Tier II power strips and LED lighting into the program, providing customers with the opportunity for greater savings.
2.3: Provide low income customers with measures that result in the most savings in the ESA Program.	<ul style="list-style-type: none"> Continue to evaluate. Assess opportunities to incorporate new energy efficiency measures into the ESA Program, e.g., plug-load reduction, new HVAC technology. 	<ul style="list-style-type: none"> During 2017, the IOUs began monthly discussions to identify opportunities to integrate new measures into the program and propose in the Mid-Cycle Advice Letter filing. The ESA, Emerging Technology, and Energy Efficiency teams meet

Implementation Plan and Timeline		
Strategies	Term 2017 – 2020	IOU strategy employed this program year
		regularly to discuss new innovations which may be integrated into the programs once the technology and savings are fully vetted.
2.4: Increase delivery of efficiency programs by identifying segmented concentrations of customers.	<ul style="list-style-type: none"> Continue to evaluate. Evaluate approach and determine whether additional segments are needed. 	<ul style="list-style-type: none"> SDG&E organized its residential population into detailed profiles of individual segments, describing them by energy-related attitudes and behaviors, including demographics, energy conservation behaviors, media consumption habits, lifestyle preferences, mobile usage, propensity to engage and more. SDG&E further refined its residential customer profile with a new segmentation tool, PRIZM Premier, providing deeper insight into a customer's financial position and information on their technological preferences.

1.2. Energy Savings Assistance Program Overview

1.2.1. Provide a summary of the Energy Savings Assistance Program elements as approved in D. 14-08-030, D. 16-11-022, and D. 17-12-009:

Program Summary			
	Authorized Budget / Planning Assumptions	Actual	%
Budget ⁹	\$34,313,691	\$17,996,715	52%
Homes Treated	20,316	21,677	107%
kWh Saved	6,250,000	3,446,316	55%
kW Demand Reduced	1,026	402	39%
Therms Saved	400,000	208,384	52%
GHG Emissions Reduced (Tons)	5,778	3,115	54%

⁹ Includes unspent funds approved in Commission Resolution E-4884 approved December 14, 2017.

1.3. Marketing, Education, and Outreach

1.3.1. **Provide a summary of the geographic segmentation strategy employed, (i.e., tools and analysis used to segment “neighborhoods,” how neighborhoods are segmented and how this information is communicated to the contractor/CBO).**

SDG&E understands the importance of customer segmentation, as it enables us to identify hard-to-reach customers and gain insights to barriers and solutions. When organizing SDG&E’s residential population into detailed profiles of individual segments, there are a number of ways to describe them by energy-related attitudes and behaviors, including: demographics, energy conservation behaviors, media consumption habits, lifestyle preferences, mobile usage, propensity to engage and more.

SDG&E used a variety of factors to help identify customers that are more likely to qualify for the ESA Program. These include using the most current Athens Research Study and SDG&E’s recent Residential Segmentation model, which underwent a refresh in 2016. The purpose of the refresh was to modernize our residential customer segments to account for market changes and ever-changing customer dynamics. This segmentation allowed for targeted messaging to customers with high potential for eligibility. Likewise, the utilization of customers’ preferred channels of communication enabled SDG&E to drive customer enrollment. A series of communication tactics such as direct mail, outbound calling, and door-to-door canvassing were deployed to potentially eligible customers within specific neighborhoods. In addition, SDG&E’s branch office locations continue to provide customers with the ability to apply for the ESA Program.

An example of this multi-touch, integrated approach is the 2017 ESA Program targeted marketing campaign in which SDG&E sent an email and/or direct mail postcard to approximately 17,492 currently enrolled CARE customers, encouraging them to save

more through the ESA Program. SDG&E then provided a canvassing list from the direct mail list to its three ESA Program outreach contractors, providing ESA Program penetration rates and PRIZM¹⁰ code info for each zip code. See Appendix A for a sample of this creative.

SDG&E's outreach team engaged its network of more than 250 Energy Solutions Partners, made up of Community Based Organizations (CBOs), to reach specific geographic areas and multicultural communities. These partners were established based on zip code data that was obtained to identify organizations that were in areas within the low-income population and in various pockets throughout San Diego. These areas include harder to reach rural, multi-cultural / multi-lingual and special needs communities. The ability for CBOs to penetrate these harder to reach customer segments was very valuable in securing enrollments. These partner organizations have established relationships and trust with their communities, so SDG&E coordinated tactics with the CBOs to promote its CARE, FERA, and ESA programs to their customers, leading to more enrollment opportunity. These tactics included presentations, events, workshop trainings and messaging to help increase awareness and to drive enrollments in the ESA Program. As part of its customer engagement outreach plan, SDG&E educated its partners with training materials on the ESA Program, including utilizing the CARE, FERA, and ESA programs' online enrollment process to help streamline the enrollment process for their organization. The Energy Solutions Partner Network¹¹ leverages both

¹⁰ PRIZM® is The Nielsen Company's lifestyle segmentation system that combines data such as demographic, consumer behavior, and geographic to help define 66 distinct consumer segments.

¹¹ SDG&E's Energy Solutions Partner Network consists of over 250 local, grassroots and community based organizations.

traditional messaging (e-mail, newsletters, direct mail) and social media (Facebook, Twitter, Pinterest) platforms to effectively deliver tailored messages to customers from organizations they are aligned with and trust. SDG&E also worked with our Energy Solutions Partners to provide education and engagement opportunities at approximately 640 presentations and events throughout its service territory. At the events with multicultural/multilingual partners or communities, SDG&E secured bilingual representatives to communicate effectively with non-English speaking customers who often represent SDG&E's hardest-to-reach populations.

1.3.2. Provide a summary of the customer segmentation strategies employed (i.e. tools and analysis used to identify customers based on energy usage, energy burden and energy insecurity) and how these customer segments are targeted in the Whole Neighborhood Approach to program outreach.

SDG&E continued to utilize its Residential Segmentation data overlaid with the Athens Research Study. Using this information, SDG&E has distinct segments among residential customers based on various factors such as:

- Perceived ability and willingness to take action to change energy consumption patterns and behaviors;
- Motivations for adopting new behaviors, including underlying values that drive decisions;
- Attitudes toward energy efficiency and environmental issues;
- Affinity for new technologies and energy management tools;
- Technology and communication tools used (internet, smart phones, etc.); and
- Limited or specialized communications needs and preferences.

To connect with the target audiences, SDG&E replaced its creative look from 2016 with a refreshed creative look for the 2017 campaign. The campaign focused on

letting qualified customers know they can save on their energy through emotionally connecting with customers by giving them one less thing to worry about. The campaign ran in English, Spanish and Asian languages and included TV (live plus streamed), newspaper, digital (including paid search), email, direct mail and bill inserts.

SDG&E also utilized the target segmentation for the whole neighborhood approach by direct marketing through door-to-door and email efforts employed throughout 2017.

1.3.3. Describe how the current program delivery strategy differs from previous years, specifically relating to Identification, Outreach, Enrollment, Assessment, energy Audit/Measure Installation, and Inspections.

Outreach and Enrollment Strategies:

In July, SDG&E began retreatment efforts directed in D.16-11-022. The decision directed the utilities to develop a prioritization model to target customers for retreatment. SDG&E proposed to prioritize households with users above 300% of baseline for retreatment and measure feasibility, utilizing ESA Program database information to target customers previously enrolled in the program. SDG&E developed targeting lists for contractors to begin retreatment efforts. These efforts were expanded to include customers served prior to 2009 so that contractors could efficiently manage serving ESA 2020 customers and retreatment customers located in multifamily properties.

SDG&E also worked closely with O&A contractors to make improvements to their process for collecting the Property Owner Authorization (POA) form. The goal was to improve the number of homes receiving all feasible measures and not only those measures not requiring the POA form. SDG&E's primary O&A contractor, Richard Heath and Associates (RHA), adjusted their processes and procedures and the changes

resulted in an improvement in the number of homes treated being converted to weatherization. RHA focused on multifamily properties where multiple units could be provided weatherization services in a coordinated effort, minimizing duplicative communications and visits to the property manager/owner and tenants. Due to the high enrollment activity in November and December of 2017, and the delay between enrollment to weatherization, the results of the process improvements will not be reflected in weatherization activity until the first quarter of 2018.

In-Home Education:

In compliance with D.16-11-022, SDG&E worked with the IOUs to begin the development of new statewide In-Home Education materials and contractor training materials. The goal is to have consistent program delivery from all contractors representing the ESA Program. The IOUs are developing individual inserts for information specific to the IOUs, such as My Account. The IOUs anticipate implementation of the statewide In-Home Education booklet in mid-2018 and statewide training by January 2019.

Measure Installation:

In D.16-11-022, SDG&E received approval to integrate several new measures as part of the measure mix offered in the ESA Program. The most anticipated change was the transition from compact fluorescent lights (CFL) to low emission diode (LED) lights. SDG&E began the transition in July 2017 and required contractors to eliminate the use of CFLs no later than December 31, 2017. SDG&E contractors also began installing Tier II power strips. Additional measures approved were heat pump water

heaters, energy efficient fan controllers, thermostatic tub spouts and prescriptive duct sealing. The integration of these measures into the program was delayed for 2017 to finalize statewide installation standards.

1.3.4. Track Costs of AB 793 related Energy Management Technologies programs (identify all of the programs or initiatives that will be able to benefit from the availability of the end-use and electric usage profiles, and to coordinate with the relevant proceedings so that the relevant costs can be considered in those proceedings' cost-effectiveness decision-making), including costs for Energy Education.

SDG&E is in the process of updating In-Home Education curriculum for implementation in 2019 to also include educating customers on electric usage profiles. No cost was incurred by the program in 2017. Additionally, SDG&E will be requesting approval in the 2018 mid-cycle advice letter to add measures that will allow customers to use technology to participate in a DR program in 2019.

AB793 efforts extend beyond the Energy Savings Assistance program. SDG&E is in the process of finalizing the bid selection for its Residential Home Area Network (HAN) and Pay for Performance (P4P) and its Small/Medium Business P4P programs. SDG&E expects to have vendor selection completed and program ramp up by the end of the second quarter of 2018. In support of AB 793 efforts, SDG&E's Marketplace will also have a link to Advanced Metering Infrastructure (AMI) services to facilitate Green Button connect efforts consistent with direction from Assembly Bill (AB) 793 located at: <https://marketplace.sdge.com/>.

1.4. Energy Savings Assistance Program Customer Enrollment

1.4.1. Distinguish between customers treated as “retreated or go backs” and “first touch” customers so that the Commission has a clear idea of how many new customers the IOUs are adding to the Energy Savings Assistance Program.

In 2017, SDG&E’s ESA Program treated a total of 21,674 homes, of which 13,212 were first touch homes and 8,462 were retreatment home. The details regarding the homes treated can be found in Table 2 of this report.

1.4.2. Please summarize new efforts to streamline customer enrollment strategies, including efforts to incorporate categorical eligibility and self-certification.

SDG&E did not implement any additional efforts to streamline enrollment processes in 2017. SDG&E uses categorical eligibility and targeted self-certification for customers in identified low income areas based on PRIZM codes. Additionally, SDG&E leverages CARE post-enrollment verification income documents to enroll ESA Program qualified customers.

1.4.3. If the IOU has failed to meet its annual goal of number of households served, please provide an explanation of why the goal was not met. Explain the programmatic modifications that will be implemented in order to accomplish future annual goals of number of households served.

In 2017, SDG&E exceeded the homes treated goal.

1.5. Disability Enrollment Efforts

1.5.1. Provide a summary of efforts to which the IOU is meeting the 15% penetration goal.

In 2017, SDG&E treated 1,770 disabled customers through its ESA Program, which represents 8% of all ESA Program homes treated. SDG&E conducts extensive outreach efforts with organizations serving disabled communities, listed below, to help improve ESA Program engagement.

- San Diego Center for the Blind;

- Deaf Community Services;
- Braille Institute;
- Mental Health & Services;
- Learning Communication and remembering; and
- Senior Centers.

Information regarding these extensive efforts are listed in section 1.5.2.

1.5.2. Describe how the Energy Savings Assistance Program customer segmentation for ME&O and program delivery takes into account the needs of persons with disabilities.

SDG&E's ME&O activities are designed to specifically support the needs of customers with disabilities. SDG&E has worked diligently to partner with various CBOs, including nonprofit organizations, hospitals and community clinics, and county/city agencies that provide direct services to this customer segment providing education and engagement opportunities in support of the ESA Program. Partner segments with outreach activities include:

- Hearing & Vision

- I. San Diego Center for the Blind.

- a. Deliver presentations about SDG&E's energy solutions and services that include low income and MBL programs six times per year in English and Spanish.
- b. Engage with approximately 120 students per year who come to the center to learn skills and information related to living visually impaired or blind.
- c. Provide energy efficiency, gas safety, emergency preparedness information and how to connect with SDG&E's services for marking range dials which are raised reference points on appliance control knobs. This allows customers to identify settings with their finger tips on such appliances such as stoves, ovens, water heaters, heaters and thermostats in their home to make them easier to use.
- d. Offer bills in braille and information on payment solutions and rate reform.

II. Deaf Community Services

Resource initiatives and programs that affect or benefit the deaf community in SDG&E's service territory.

- a. Provide an annual in-service presentation at one of the organization's monthly staff meetings listing out a comprehensive overview of:
 - i. Programs, services, and on-line resources.
 - ii. Residential rebates, Initiatives, Energy savings tips, and programs.
- b. Participate with a booth at Deaf Community Services annual fall exhibition fair.
- c. Invite Deaf Community Services to SDG&E's annual partner roundtable that includes a sign-language interpreter where SDG&E provides another opportunity to learn about all the services available to residential customers.
- d. On a monthly basis all Deaf & Community Services marketing materials are shared through all of its communication channels.
- e. Working with Deaf & Community Services to produce short news videos in American Sign Language (ASL) and closed captioning to help reach out to their stakeholders and patrons.

III. Braille Institute

- a. Eye Seminar-April 4th – an SDG&E informational roundtable.
- b. Presentation on rate reform and time-of-use (TOU) in September.
- c. Monthly messages posted on social media.
- d. SDG&E message listed two times a year in their newsletter.

IV. Mental & Health & Services

Several Energy Solutions Partners offered services targeting mental health.

- a. Partners attended SDG&E Partner Roundtable events.
- b. SDG&E conducted presentations to partners on CARE, FERA and ESA programs.

- c. Monthly messages posted on social media.

V. Learning, Communicating & Remembering

- Southern Caregiver Resource Center
 - Attend SDG&E tailgates at the branch offices where the center can display their resource information to customers.
 - The center attends SDG&E's Partner Roundtable events.
 - The center also promotes SDG&E's CARE, FERA, ESA programs to customers.

VI. Senior Centers

- a. Outreach Advisors conduct presentations to the Senior Centers throughout San Diego with information on SDG&E's programs.

1.5.3. **Identify the various resources the IOUs utilize to target the disabled community and the enrollments as a result:**

SDG&E's ME&O communications are designed to specifically address the communication needs of its customers with disabilities as detailed below.

For customers with visual impairments, SDG&E has provided large-font printed collateral materials and provides program information booklets in braille. In 2017, SDG&E updated and refreshed the braille booklet with the most up-to-date energy saving tips and resources.

For customers with hearing impairments, SDG&E worked with its CBO's to produce videos in ASL and closed-captioning to promote SDG&E's ESA program.

In addition, SDG&E has partnered with several CBO's serving customers with special needs to actively promote the ESA Program, including:

- AARP;
- Abled-Disabled Advocacy, Inc.;
- Access to Independence;

- ARC – San Diego;
- Braille Institute;
- Burn Institute;
- Challenged Athletes Foundation;
- Deaf Community Services;
- Developmental Disability Provider Network (DDPN);
- Disability Help Center;
- Disabled Veterans of San Diego;
- ElderHelp San Diego;
- Meals on Wheels;
- Mental Health Association;
- National Alliance on Mental Illness;
- San Diego Center for the Blind;
- San Diego County – Aging & Independent Services;
- San Diego Council on Literacy;
- San Diego Parks & Recreation – Disabled Services Advisory Council;
- Southern Caregiver Resource Center;
- Rehabilitation & Assisted Living Care Facilities; and
- Senior Centers.

These partners provide customized messaging through email, e-blasts, newsletters, social media posts like Facebook and Twitter, as well as at events, workshops and training with the organization’s staff. These efforts led to 1,770 special needs ESA Enrollments for 2017.

1.5.4. If participation from the disabled community is below the 15% goal, provide an explanation why:

In 2017, SDG&E's ESA Program achieved 1,770 enrollments (or 8%) for disabled customers. SDG&E faced challenges in reaching the 15% goal in part because of the limitation in the ability to request disability information from customers.

When marketing to the community, SDG&E customers may or may not specify if they have a disabled person in their household, so the contractor or outreach team member uses their best efforts to obtain this information on the ESA Program assessment form. Additionally, contractors are not able to inquire about disability status in the home and that information is not generally volunteered. With the limitation on the methods for collecting disability information, an accurate representation of the true number of disabled customers served through the program is difficult to obtain.

To help improve enrollment efforts, SDG&E worked diligently with its CBOs to reach out to customers with disabilities. SDG&E's program materials are also offered in braille and large font to help those with vision impairment. SDG&E's Deaf Community Services partner is able to provide videos in ASL and also work with SDG&E in reaching out to special needs customers as needed.

1.6. Leveraging Success, Including LIHEAP

Decision 08-11-031 defines leveraging as “an IOU’s effort to coordinate its ESA programs with programs outside the IOU that serve low income customers, including programs offered by the public, private, non-profit or for-profit, local, state, and federal government sectors that result in energy efficiency measure installations in low income households”. Progress will be measured by tracking the following criteria:

- **Dollars saved:** Leveraging efforts are measurable and quantifiable in terms of dollars saved by the IOU (shared/contributed/donated resources, elimination of redundant processes, shared/contributed marketing materials, discounts or reductions in the cost of installation, replacement,

and repair of measures, are just some examples of cost savings to the IOU).

- **Energy savings/benefits:** Leveraging efforts are measurable and quantifiable in terms of home energy benefits/savings to the eligible households.
- **Enrollment increases:** Leveraging efforts are measurable and quantifiable in terms of program enrollment increases and/or customers served.

1.6.1. Describe the efforts taken to reach out and coordinate the Energy Savings Assistance Program with other related low income programs offered outside the IOU that serve low income customers.

SDG&E established partnerships with over 250 Energy Solutions Partners and third-party contractors to reach low income customers and provide them with information about the ESA, CARE and FERA programs. Many of these partners work specifically with low income programs that allow for categorical enrollments. These partners include WIC agencies, Catholic Charities, 2-1-1 San Diego, and many more similar agencies. The partnership with 2-1-1 San Diego provides the largest opportunity for SDG&E to reach customers with the greatest need, as they serve as an intake agent offering many services and programs to help the low-income population. As part of the intake process, 2-1-1 San Diego enrolls the customer in CARE and FERA and also offers leads to the ESA Program. Over 2,000 customers were enrolled in the ESA Program from SDG&E partnership efforts in 2017.

SDG&E continues to work closely with GRID Alternatives to efficiently identify and serve any ESA Program eligible customers with all feasible measures. As a result, Single-Family Affordable Solar Homes (SASH) Program participants can move forward with their solar installation at an accelerated pace.

In 2017, the number of leads provided by GRID Alternatives declined and SDG&E was not able to enroll any SASH customers in the ESA Program. Additionally, as directed in D.16-11-022, SDG&E entered into a non-disclosure agreement with GRID Alternatives to provide customer information for CARE high usage customers having received ESA Program services. Additional information regarding this effort is provided in Section 1.7.6 below.

1.6.2. In addition to tracking and reporting whether each leveraging effort meets the above criteria in order to measure the level of success, please describe the Other Benefits resulting from this particular partnership not captured under the 3 criteria described above.

SDG&E has found that the other benefits resulting from leveraging partnerships include providing customers with a more robust set of solutions to help reduce the burden of the day-to-day necessities in the home. Partnerships with organizations such as 2-1-1 San Diego also help streamline the enrollment processes for the programs and increase the ability of customers to receive comprehensive services, from payment assistance to ESA Program measure installation, with reduced efforts on their part.

1.6.3. Please provide a status of the leveraging effort with CSD. What new steps or programs have been implemented for this program year? What was the result in terms of new enrollments?

In mid-2017, SDG&E began working closely with local LIHEAP agencies to improve leveraging opportunities between CSD's LIHEAP programs and the ESA Program. In July, SDG&E signed contracts with two local LIHEAP agencies adding 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. In 2017, LIHEAP agencies enrolled and treated 417 customers through leveraging efforts.

In the fourth quarter of 2016, the IOUs and CSD began working to implement D.16-11-022 leveraging requirements to share IOU data usage information for CSD clients and to fund ESA measures currently offered by ESA for multifamily customer households participating in CSD's Low Income Weatherization Program (MF LIWP). Throughout 2017, SDG&E, along with the other IOUs, met with CSD to discuss data sharing, CSD's MF LIWP leveraging, and other opportunities, in compliance with D.16-11-022 directives.

CSD Data Sharing: On September 1, 2017, in accordance with D.16-11-022, as modified by D.17-12-009¹², SDG&E and CSD entered into a non-disclosure agreement (NDA) for data sharing purposes. This fully-executed NDA allowed for data sharing to begin as required in D.17-12-009. On December 8, 2017, CSD submitted their first data request in accordance with all terms within the agreed upon NDA. This data transmittal included CSD-requested customer-specific usage data. SDG&E compiled the data and submitted it to CSD on January 30, 2018. SDG&E, CSD, and the other IOUs are in discussions to determine the frequency of future data sharing efforts, along with other possible technological mechanisms to make this data sharing as seamless as possible.

CSD MF LIWP Leveraging: D.16-11-022 required SDG&E to fund ESA Program measures currently offered by the ESA Program for multifamily customer households participating in CSD's MF LIWP. SDG&E worked with

¹² D.17-12-009, Attachment 1, Ordering Paragraph 140.

CSD to project installation rates for these measures that included SDG&E's costs for both labor and measure installation to calculate the projected funding level for this effort. The goal of funding the CSD's MF LIWP efforts for those in-unit measures provided by the ESA Program is to preserve the remaining CSD funding for use to install central systems and common area measures not provided by the ESA Program. SDG&E's budget for this effort was included in its Conforming Advice Letter submitted on March 24, 2017, and supplemented on June 22, 2017, and was authorized by Commission Resolution E-4884 approved December 14, 2017. Since working with CSD to develop a budget for LIWP leveraging efforts, SDG&E ESA Program Management, Legal, and Sourcing have been actively working with the CSD team to complete the contract terms necessary to begin leveraging funds. SDG&E expects to begin implementation in 2018.

SDG&E has also made progress in leveraging efforts with local Weatherization Assistance Program efforts. SDG&E has added two local agencies as ESA Program outreach and assessment contractors to expand opportunities for leveraging efforts. This collaboration is currently being used to expedite ESA Program services to customers who have received energy bill assistance and to provide additional measures to those who are receiving weatherization services.

1.6.4. Describe the coordination efforts with water agencies or companies (wholesalers or retailers).

In response to the drought emergency in California, SDG&E began collaborating with the San Diego County Water Authority (SDCWA) in 2015 to help customers reduce their cold-water use. Through these efforts, SDG&E

began offering water conservation education and began providing customers with toilet dye tabs to detect leaks as well as shower timers. As directed in D.16-11-022, SDG&E also enhanced water education to include shower timers, dye tabs and water displacement devices as part of the Toilet Tank Efficiency Kits. In 2017, SDG&E's O&A contractor distributed 18,372 water kits to customers through these efforts.

SDG&E also continued its partnership with the SDCWA to offer homeowner workshops at its Energy Innovation Center. Over 400 homeowners participated in water-wise landscape workshops. In addition, SDG&E partnered with Moulton Nigel Water District to participate at the Live Smart Waterwise event with 1,000 attendees.

1.7. **Integration Success**

Per D.08-11-031:

“Integration constitutes an organization's internal efforts among its various departments and programs to identify, develop, and enact cooperative relationships that increase the effectiveness of customer demand side management programs and resources. Integration should result in more economic efficiency and energy savings than would have occurred in the absence of integration efforts.”

1.7.1. **Describe the new efforts in program year to integrate and coordinate the Energy Savings Assistance Program with the CARE Program.**

The CARE and ESA programs have had extensive coordination efforts in place over the past several years which are intended to simplify the enrollment process and eliminate duplication of efforts by customers. Efforts include, but are not limited to: leveraging income documents information to simplify enrollment for customers, a single on-line application form for the CARE and ESA programs, and CARE enrollment on the ESA agreement forms. SDG&E's Customer

Outreach team also coordinates outreach opportunities when working with contractors and customers in the community. These efforts continued in 2017.

1.7.2. Describe the new efforts in program year to integrate and coordinate the Energy Savings Assistance Program with the Energy Efficiency Residential Program.

SDG&E began to utilize a Multifamily (MF) Single Point of Contact (SPOC) approach to provide a one-stop shop for MF property owners and managers. Through the SPOC, SDG&E facilitates the MF property owners' participation in all programs, while minimizing the confusion that owners/managers may have regarding the program participation and qualifications. The SPOC coordinates common area and in-unit enrollments so that they appear to be one comprehensive whole building approach from the participants perspective. The SPOC approach also allows for better visibility into what is and is not working by identifying areas where refinements in the programs may be needed to improve property owner/manager satisfaction with utility programs. In addition to the ESA Program, the SPOC will be leveraging the current list of measure offerings available through the Multifamily Energy Efficiency Rebate (MFFEER) Program, High Opportunity Pilot Program (HOPP), Middle Income Direct Install (MIDI), and Energy Upgrade California Multifamily (EUC MF) Program. The SPOC will also look to leverage future programs such as the Solar on Multifamily Affordable Housing (SOMAH).

1.7.3. Describe the new efforts in program year to integrate and coordinate the Energy Savings Assistance Program with the Energy Efficiency Government Partnerships Program.

In 2017, SDG&E began discussions with the City of San Diego and the SDCWA to identify opportunities to partner and serve low income customers with

additional measures that are not currently offered through the ESA Program.

More information regarding these efforts will be available in 2018 once more details have been discussed and plans have been developed.

1.7.4. Describe the new efforts in program year to integrate and coordinate the Energy Savings Assistance Program with any additional Energy Efficiency Programs.

Through the SPOC approach, SDG&E is facilitating the MF property owners' participation in other qualifying internal SDG&E programs, such as Power Your Drive (PYD). In addition, the SPOC will work to support enrollment efforts in SDG&E's bill assistance programs, such as CARE, FERA, and the MBL Programs.

As the implementation of the SPOC model progresses, collaboration with other regional program offerings will be facilitated, such as the MF LIWP, regional water conservation programs, and properties receiving low income tax credits through the California Tax Credit Allocation Committee (CTCAC). The SPOC will also direct participating MF property owners to all relevant funding sources, including energy efficiency and renewable energy ratepayer incentive and financing programs, regional water agency programs, greenhouse gas programs, solar tax credits, and any other funding sources.

1.7.5. Describe the new efforts in program year to integrate and coordinate the Energy Savings Assistance Program with the Demand Response Programs, including successes in Air Conditioning Cycling or other Demand Response Programs.

SDG&E did not implement any new DR efforts specifically targeting low income customers. However, SDG&E does offer DR programs to all customer

segments. As part of enhancements to In-Home Education efforts, SDG&E will begin educating customers on DR programs in early 2018.

1.7.6. Describe the new efforts in program year to integrate and coordinate the Energy Savings Assistance Program with the California Solar Initiative Programs.

SDG&E continues to work with GRID Alternatives to serve any ESA Program eligible customers with all feasible measures for both the single family and multifamily homes. GRID Alternatives provide potential leads to ESA Program staff to identify homes eligible for treatment. ESA Program staff generated leads through this efforts for contractor follow-up.

Additionally, the electric IOUs were directed to provide to the Single-family Affordable Solar Homes Program Administrator, currently GRID Alternatives, a monthly list of owner-occupied single-family households that have completed the ESA Program requirements of the CARE Program high usage process. The referral list contains ESA Program workflow outputs with the customer of record's name, address, phone number, preferred language, household income and size.

To support GRID Alternatives with their communication efforts, SDG&E's initial implementation included an interim process where SDG&E mailed letters to customers on the list who may be receiving a call from GRID Alternatives notifying them of the potential contact. As a long-term solution, SDG&E edited the CARE high usage approval letters to notify the customer that GRID Alternatives may be contacting them about the SASH program in the future.

1.7.7. Provide the number of referrals to the Single Family Affordable Solar Homes Program Administrator.

SDG&E received 45 leads from GRID Alternatives through leveraging efforts with the SASH program; however, no ESA Program enrollments were generated through this effort. Additionally, SDG&E provided 177 referrals of ESA Program participants identified as CARE high users to GRID Alternatives.

1.8. Workforce Education & Training

1.8.1. Please summarize efforts to improve and expand Energy Savings Assistance 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's Workforce Education and Training (WE&T) group conducted approximately 25 classes that ESA Program contractors were notified of and could participate in 2017. ESA Program management shares monthly emails with contractors and notified them of any relevant trainings that may benefit their staff.

1.8.2. Please list the different types of training conducted and the various recruitment efforts employed to train and hire from the low income energy efficiency workforce.

SDG&E hires third-party contractors who are responsible for conducting training of personnel for ESA Program services. As part of the ESA Program contractor agreements, SDG&E encourages contractors to hire and train personnel from locations where services are performed to help create jobs and opportunities in areas of disadvantaged and low-income communities.

1.9. Legislative Lighting Requirements Status

1.9.1. **Provide a summary on current and future CFL supply issues, as experienced by the IOU. Any current / future problems as well as potential solutions should be discussed in this paragraph.**

SDG&E contractors did express concerns early in 2017 with availability of CFL bulbs and torchieres. In July 2017, SDG&E transitioned contractors from CFL bulbs to LEDs, eliminating any concerns regarding product availability. All contractors were required to transition all CFL measures offered to LED lighting by December 31, 2017.

1.9.2. **Provide a summary explaining how IOU promotes the recycling/ collection rules for CFLs.**

As part of SDG&E's In-Home Education, field representatives are required to review the ESA Energy Education guide, which includes information regarding the proper disposal and recycling of CFLs.

1.9.3. **Complete Table 15 (in Appendix). In addition, please briefly summarize the CFL procurement process for the IOU, including manufacturers, distributors, warehousing, and contractor delivery.**

SDG&E does not procure CFLs for the ESA Program. ESA Program contractors are responsible for purchasing CFLs and providing warehousing of the products.

1.10. Studies

1.10.1. **For each Study, provide 1) a summary describing the activities undertaken in the study since its inception; 2) the study progress, problems encountered, ideas on solutions; and 3) the activities anticipated in the next quarter and the next year.**

D.16-11-022 authorized three statewide studies: A Low-Income Needs Assessment (LINA), an ESA Impact Evaluation, and a Non- Energy Benefits (NEBs) study. In addition, the Decision authorized funding for a low-income

component of the Statewide Energy Efficiency Potential Study, and for local “rapid feedback” research. Each of these is discussed below.

Statewide Low-Income Needs Assessment (LINA) Study

The LINA Study is mandated to be conducted every three years per AB 327 and Public Utilities Code Section 382(d). The Energy Division and the IOUs held a public workshop on May 19, 2017 to discuss the scope of work for the LINA authorized in D.16-11-022 (2019 LINA), and the IOUs released a Request for Proposal (RFP) for this work in the fourth quarter of 2017. A contract with Research Into Action was completed in the first quarter of 2018 with SCE as the contracting IOU. A public workshop will be held once a research plan has been developed. The 2019 LINA will be completed by December 2019.

ESA Energy Savings Impact Evaluation

Following the direction of Energy Division, the IOUs issued an RFP to conduct the time-sensitive ESA impact evaluation in November 2015. The bid was awarded in February 2016 to DNV GL, pending authorization of the study which was granted in D.16-11-022. SoCalGas is the contracting IOU. Work began in 2017, and a study initiation meeting was held in February 2017. A public webinar was held on September 6, 2017 to present the research plan. The draft and final plan was also posted on the Energy Division’s public document website for stakeholder comment. Initial results were presented in March 2018, and the Final Report for the study is expected to be completed in March 2019.

ESA Non-Energy Benefits Study

The scope of work for the ESA NEB Study was developed in consultation with the ESA Cost Effectiveness Working Group in 2017. An RFP for the study was issued in March 2018. SDG&E will be the contracting IOU for this statewide study which is expected to commence in April 2018 and be completed by the end of 2018.

Low Income Component of the Energy Efficiency Potential Study

This study is managed by Energy Division. The 2019 Energy Efficiency Potential and Goals Study is expected to begin in late 2018. No work was completed on this study by the IOUs in 2017.

Rapid Feedback Local Research

No work was initiated with this funding in 2017.

D.16-11-022 and D.17-12-009 Evaluation Requirements

Ordering Paragraph 52 of D.17-12-009 states “Pacific Gas and Electric Company, Southern California Edison Company, San Diego Gas & Electric Company and Southern California Gas Company shall apply the latest version of the *Energy Division & Program Administrator Energy Efficiency Evaluation, Measurement and Verification Plan* for the oversight, formation, description, tracking, review and approval, and initiation of their Evaluation, Measurement

and Verification efforts. The utilities should update its impact evaluations to be in accordance with the guidelines established within this decision.”

In accordance with this direction, the IOUs have been working with Energy Division on the approved statewide studies as described in the sections above. Draft and final research plans as well as draft and final study reports are to be posted on the Commission’s public document website and noticed to the applicable service list. Parties are encouraged to post written comments on the draft documents which are then considered for the final documents.

Requests for studies or analyses using the Rapid Feedback and Analysis funding will be posted on Energy Division’s Basecamp website and require approval from Energy Division before commencing the study. No requests for studies using this funding were made in 2017.

D.16-11-022 and D.17-12-009 Approved Evaluations

Study	Lead Consultant	Contracting IOU	Project Initiation	Project Completion	Statewide Budget	SDG&E Budget
2019 Statewide LINA	Research Into Action	SCE	2017	2019	\$500,000	\$75,000
PY2015 Statewide ESA Impact Evaluation	DNV GL	SoCalGas	2017	TBD	\$550,000	\$82,500
Statewide NEBs Study	TBD	SDG&E	2018	2018	\$150,000	\$22,500
ESA Portion of the Statewide Energy Efficiency Potential Study	TBD	N/A	TBD	TBD	\$300,000	\$45,000
Rapid Feedback Research & Analysis	TBD	SDG&E	TBD	TBD	N/A	\$200,000
Total					\$1,500,000	\$425,000

1.10.2. If applicable, submit Final Study Report describing: (1) overview of study; (2) budget spent vs. authorized budget; (3) final results of study; and (4) recommendations.

No study reports were finalized during 2017.

1.11. Pilots

1.11.1. For each Pilot, provide 1) a summary describing the activities undertaken in the study since its inception; 2) the study progress, problems encountered, ideas on solutions; 3) the activities anticipated in the next quarter and the next year; and 4) Status of Pilot Evaluation Plan (PEP).

D.16-11-022 directed the three electric IOUs to propose a pilot in accordance with Appendix A in D.16-11-022. The statewide budget for this effort was \$750,000 for the program cycle, with SDG&E's portion being \$250,000. On March 24, 2017, the Joint IOUs filed a PFM of D.16-11-022 requesting clarification of the timing of the PCT pilot. In response to the Joint IOUs PFM, the Commission issued D.17-12-009 which directed, among other things, the IOUs to file uniform PCT pilot plans to be "aligned with the core design of the plan in Appendix A of D.16-11-022 to the extent possible to determine actionable and reliable results. The goal is to have the pilot in place for the 2018 summer season."

Additionally, on April 3, 2017, SDG&E filed Conforming Advice Letter 3065-E/-2568-G in compliance with D.16-11-022. In the Conforming Advice Letter, SDG&E proposed that the pilot include more than 100 customers with the specific amount to be specified in the pilot plan. SDG&E believed that 100 customers would not be a sufficient sample size to estimate the demand and energy savings. SDG&E also proposed plans to use additional funds from its unspent funds in order to increase the sample size. The total proposed budget for the PCT pilot to run in 2018 and 2019 was \$500,000. On December 14, 2017, the Commission approved Resolution E-4884, approving SDG&E's request to

increase the sample size of the PCT pilot and SDG&E's proposed budget of \$500,000.

On March 1, 2018, SDG&E filed Advice Letter 3197-E/2655-G with its proposed pilot implementation plan. PG&E and SCE filed similar advice letters and pilot implementation plans. On March 21, 2018 the Office of Ratepayer Advocates (ORA) filed a protest to the IOUs' advice letters requesting that the Commission reject the individual pilots proposed by the IOUs and instead require a single statewide pilot. On March 27, 2018, SDG&E received a suspension notice on its Advice Letter. On March 28, 2017 the IOUs filed joint reply comments to ORA's protest. SDG&E is currently awaiting Commission action on its advice letter.

1.11.2. If applicable, submit Final Pilot Report describing: 1) Overview of pilot; 2) Description of Pilot Evaluation Plan (PEP); 3) Budget spent vs. authorized budget; 4) Final results of pilot (including effectiveness of the program, increased customer enrollments or enhanced program energy savings); and 5) Recommendations.

Not applicable.

1.12. "Add Back" Measures

For measures that fall below the cost effectiveness threshold under Decision 08-11-031, we require additional reporting to show the cost, energy savings impacts, and related metrics.

1.12.1. If the "add-backs" compromise the IOUs' ability to meet the 2020 Plan goal that 100% of eligible and willing customers will have received all cost effective Energy Savings Assistance Program measures, how does the IOU propose to address the shortfall in other parts of the Energy Savings Assistance Program?

Add back measures have not negatively impacted the program and SDG&E is on track to meet the 2020 goal by 2019.

1.13. Low Income Working Groups

D.12-08-044 authorized Energy Division to form three Working Groups during the 2012-2014 program cycle: (a) the Energy Savings Assistance Program Cost-effectiveness Working Group, (b) the Energy Savings Assistance Program Workforce, Education and Training Working Group, and (c) the Mid-Cycle Working Group to review those components of the Commission's Energy Savings Assistance Program and California Alternate Rates for Energy Programs to make recommendations for refinements to improve, wherever possible, the design, administration, delivery and ultimate success of these programs. D.16-11-022, as modified by D.17-12-009, reconvened the Cost Effectiveness and Mid-Cycle Working Groups and convened a new Multifamily Working Group (MFWG). The Working Groups 2017 activities are summarized below.

ESA Cost Effectiveness Working Group

D.16-11-022, as modified by D.17-12-009, instructed the ESA Cost Effectiveness Working Group to reconvene and to provide a set of recommendations related to the ESA cost effectiveness calculations. The members participating in the Working Group include representatives from the following organizations: Energy Division, ORA, National Resources Defense Council, The Utility Reform Network, TELACU/ACCES/Maravilla, Synergy Companies, SCE, PG&E, SoCalGas, and SDG&E. The direction to the Working Group from D.16-11-022, as modified by D.17-12-009, included the following:

1. Submit a proposed schedule and work plan to the low income proceeding service list no later than 60 days after the date of Decision approval.
2. Provide recommendations on a set of issues related to ESA cost effectiveness calculations to be used to inform the next program cycle; these recommendations or a

progress report are to be distributed to the service list no later than the second quarter of 2018.

Item number one was submitted to the service list on January 11, 2017. The Working Group met monthly through 2017 both by teleconference and in-person to discuss the issues in Item number two. The issues discussed by the Working Group included the following:

- Measures to include/exclude in the adjusted ESACET;
- Excluding administrative costs and NEBs associated with excluded measures from the adjusted ESACET including program costs not tied to a specific measure;
- Allocating administrative costs and NEBs across program measures;
- Incorporating revised NEB values into the adjusted ESACET;
- Whether to incorporate into the ESACET benefits and costs for ESA investment in other programs such as demand response; and
- Work scope for the 2018 NEB study.

The Working Group began drafting a set of written recommendations in the fourth quarter of 2017. The recommendations will be finalized and submitted in 2018.

Multifamily Working Group

The MFWG was established to support the integration of common area measures for deed restricted MF properties into the ESA program and other MF directives as specified in D.16-11-022, as modified by D.17-12-009. The MFWG developed a 2017 Annual Report describing the working group composition and structure, and detailing their 2017 activities. (Posted to www.energydataweb.com.)

Highlights of MFWG 2017 include:

- MFWG members provided input concerning multi-family program design suggestions;
- IOUs' initial program design review and discussion compared against a list of program design suggestions supplied by MFWG members; and

- Completed two property owners/operator discussions (i.e., large vs small/medium property owners/operators) to solicit program design feedback.

Mid-Cycle Working Group

D.16-11-022, as modified by D.17-12-009, instructed the Mid-Cycle Working Group to reconvene and address the tasks outlined below. The MCWG was reconvened in February 2017. The members participating in the Working Group include representatives from the following organizations: Energy Division, ORA, SCE, PG&E, SoCalGas, SDG&E, Energy Efficiency Council, TELACU, and Proteus.

MCWG deliverables identified in D.16-11-022, as modified by D.17-12-009, were:

- Making recommendations for updates to the Energy Savings Assistance (ESA) Statewide Policy and Procedure Manual, California Installation Standards Manual, and monthly and annual reporting criteria to align it with D.16-11-022, as modified by D.17-12-009.
- Provide recommendations on the adoption of on-line data reporting systems (ODRS) for the ESA Program to help the IOUs and Commission better understand how these systems collect and report workforce data. This assessment should help determine the value of adopting ODRS for the ESA Program into IOU operations, its cost-benefits, and identify any administrative burdens to implement by either contractor or utility.
- Making recommendations for the household retreatment prioritization models, implementation and outreach strategies, and other aspects of the ESA Program.
- Investigate and make recommendations on how the ESA Program may be used to deploy tools to enable greater Energy Efficiency and Demand Response participation by CARE and ESA participants in recognition of the increased State goals detailed in SB 350.

The MCWG held several in-person meetings in 2017 (on April 26-27 and May 24-25), as well as multiple conference calls and webinars to address these tasks.

The MCWG discussed monthly and annual reporting criteria, and reviewed and commented on the reporting templates developed by Energy Division and the IOUs at a meeting

on August 30, 2017. Comments were considered and incorporated into the templates for use beginning in 2018.

The working group completed revisions to the ESA Statewide Policy and Procedure Manual and the California Installation Standards Manual to align them with D.16-11-022, as modified by D.17-12-009. The Manuals were submitted to the service list in A.14-11-007 et. al, and presented through a public webinar on January 31, 2018.

IOUs provided their household retreatment prioritization models to the MCWG in March 2017. These were reviewed and discussed by the MCWG for their initial recommendations, submitted on April 3, 2017 (see Appendix B).

The MCWG submitted its initial recommendations on April 3, 2017, with final recommendations to be submitted in the 2nd Quarter of 2018, in time to be considered in the IOUs' Mid Cycle Update Advice Letter, which are due in July 2018 per D.17-12-009.

Demand Analysis Working Group

D.17-12-009 OP 8 states: "The Demand Analysis Working Group (DAWG) should act as the established forum for providing input into the scope, modeling and analysis of results associated with Energy Efficiency Potential Study."

The 2019 Energy Efficiency Potential and Goals Study is expected to begin in late 2018. No work was completed on this study in 2017.

1.14. Annual Public ESA Program and CARE Meeting

D.12-08-044 ordered the IOUs to convene a minimum of one public meeting per year, within 60 days of the filing of their annual report, and other public meetings as deemed necessary by the IOUs, Energy Division, the ALJ, or the Commission.

Additionally, IOUs were directed to use these meetings as a forum to host the working groups.

In compliance with D.12-08-044, the IOUs held a public forum at the California Public Utilities Commission, 505 Van Ness Avenue, San Francisco, California on June 22, 2017. The IOUs presented an overview of their 2016 ESA Program and CARE Program results.

1.15. Multifamily Properties

1.15.1. The IOUs shall conduct and report an annual analysis of the square footage, energy consumption, ESA Program participation, and time since the last retrofit of non-deed restricted multifamily properties with a high percentage of low income tenants.

In the Joint PFM, the IOUs requested clarification on the directive to report on square footage and energy consumption information. D.17-12-009 modified the directive by detailing this reporting requirement. Since D.17-12-009 was issued on December 20, 2017, there was no opportunity for SDG&E to implement in 2017.

CALIFORNIA ALTERNATE RATES FOR ENERGY ANNUAL REPORT

2. CARE EXECUTIVE SUMMARY

The CARE Program, formerly known as the Low Income Ratepayer Assistance (or LIRA) Program, was established through a legislative mandate¹³ and was implemented by the Commission in D.89-07-062 and D.89-09-044. The Commission expanded the program to qualified non-profit group living facilities such as women's shelters and homeless shelters in 1992 in response to additional legislation.¹⁴ The CARE Program was further expanded to

¹³ Senate Bill (SB) 987 (enacted in June 1988) directed the Commission to establish a program of assistance to low income customers to mitigate the impact caused by the narrowing of the baseline/non-baseline differential and that the cost of the assistance program was not to be borne solely by any single class of customer.

¹⁴ SB 693 extended CARE benefits to qualifying group living facilities; SB 491 changed the program's name and modified CARE to include women's shelters, hospices, and homeless shelters, and AB 3429

qualified agricultural employee housing facilities in D.95-10-047. In 2005, D.05-04-052 expanded the program to include authorized agricultural housing facilities managed by the Office of Migrant Services and other non-profit migrant farm worker housing centers.

Since 2005, income eligibility for CARE was set by the Commission at 200% of the Federal Poverty Guidelines.¹⁵ In 2006, the Commission authorized the IOUs to implement: 1) Categorical Eligibility which allowed customers to qualify for CARE based on their participation in certain state or federal assistance programs; 2) four-year re-certification for low income customers on a fixed income; 3) a process to enroll certain prospective CARE qualified households by telephone; 4) a process for all customers to recertify their CARE eligibility through SDG&E's Interactive Voice Recognition system (IVR); and 5) internet-based CARE enrollment and re-certification.

In D.08-11-031 the Commission expanded the list of categorically eligible programs to align with the program-based eligibility programs adopted for the Commission's California Lifeline Program and established an enrollment goal for CARE at 90% of the estimated eligible population.

In 2010, the legislature enacted Senate Bill 695 which changed section 731.9 of the Public Utilities Code to state that eligibility for the CARE Program should be no greater than 200% of the Federal Poverty Guidelines.

In D.12-08-044, the Commission approved SDG&E's CARE Program plans and budget for 2012-2014. In D.12-08-044, the Commission focused on developing controls to ensure that customers enrolling for the program are truly eligible for the benefits. The Decision also

expanded the CARE Program to include migrant farmworker housing, employee housing, and agricultural employee housing.

¹⁵ D.05-10-044.

directed the IOUs to provide an increased focus on enrolling the hard-to-reach customers, such as Limited English Proficient (LEP), hearing-impaired, and visually-impaired customers. Some of the key directives from D.12-08-044 included: 1) establishment of a High Usage Verification process for customers with electric usage exceeding 400% of their baseline allowance; 2) updates to the utilities' probability models to include more indicators, such as method of enrollment and household size; 3) a process to review the list of categorical programs annually to ensure only programs aligned with the CARE guidelines are included;¹⁶ and 4) approval of Outreach and Marketing funds focused on targeting multicultural/multilingual and LEP customers. The Commission also retained the goal of reaching a 90% participation rate and enrolling all eligible and willing customers into the program.

In January 2014, the California Legislature enacted Assembly Bill (AB) 327, which had several impacts to the CARE Program. Most notably, the bill required the IOUs to restructure the CARE rates and to set an effective electric rate discount between 30-35%. The Commission instituted a Rulemaking (R.) 12-06-013 to address CARE Rate Reform requirements from AB 327. As part of the Rulemaking, SDG&E proposed to simplify its CARE rate structure by removing the discount from volumetric rates (with the exclusion of the exemption from Department of Water Resources Bond Charge (DWR-BC), California Solar Initiative (CSI) and CARE charges) and to instead provide it as a line-item discount off a bill calculated at standard rates, beginning in 2015. SDG&E also proposed a glide path for restructuring CARE rates to set an effective CARE discount to meet the statutory requirements of AB 327 by 2020. SDG&E's

¹⁶ In Ordering Paragraph 46 of D.12-08-044, the Commission suspended the annual advice letter requirement while it resolved outstanding issues related to categorical eligibility.

proposed CARE revisions were approved in D.15-07-001. D.15-07-001 directed SDG&E to file a Tier 1 Advice Letter for approval of the 2015 rate change.¹⁷

Beginning September 1, 2015, the rate subsidy in CARE volumetric electric tier rates was moved from rates to the line-item discount, increasing the line-item discount from its current 20% levels, resulting in CARE rates being equal to the non-CARE rates excluding adjustments for CSI and DWR-BC, prior to the line-item discount and CARE surcharge exemption. This resulted in low-use CARE customers receiving a more equivalent discount when compared to high-use CARE customers. These CARE rate subsidies are reflected in the Total Rate Adjustment Component (TRAC) and recovered through Public Purpose Program (PPP) rates. With the move of the CARE rate subsidies from rates to a line-item discount, going forward the higher CARE line-item discount is now recovered directly through PPP rates. In 2016, SDG&E participated in the CARE Restructuring Working Group for rate reform. The Working Group was tasked to look closely at the CARE Rate and Program to determine if changes are necessary. In 2017, the discussion on CARE rate restructuring continued in 2017 as part of Phase 3 of the July 2015 Rate Reform Decision.

In D.14-08-030, the Commission addressed Phase II issues outlined in D.12-08-044. It authorized a 12-month bridge funding for 2015; made minor corrections and clarifications to D.12-08-044; adopted key recommendations from the 2013 LINA study for CARE; and continued further review on issues regarding the definition of income and on other issues related to the qualifying list of categorical eligibility programs.

¹⁷ Advice Letter 2783-E, Implementation Of San Diego Gas & Electric Company's 2015 Residential Rate Design Reform Pursuant To Decision 15-07-001 Effective September 1, 2015.

The Commission, in D.14-08-030, also determined that it was reasonable to continue to fund the Community Help and Awareness of Natural Gas and Electricity Services (CHANGES) Pilot Program, from the CARE budget, pending further pilot review, during the bridge period and authorized continued funding for the CHANGES Program of \$61,200 a month until December 31, 2015, which reflected a 2% cost of living increase over the authorized 2014 funding level.¹⁸

In D.15-12-047 (Interim Decision on the Community Help and Awareness of Natural Gas and Electricity Service Pilot Program, the Ongoing Program, and Related Funding) the Commission made the following determinations regarding the continuation of the CHANGES Program for the large IOUs which included the following:

- Approved the CHANGES Program as an ongoing statewide program, effective January 1, 2016;
- The program will provide outreach, education, and bill issue assistance on natural gas and electricity bills and services to limited English proficient customers through a statewide network of CBOs;
- The program will be managed by the Commission's Public Advisor's Office with technical assistance and input from the Energy Division;
- Until a long-term funding source can be established through the budgetary and/or legislative channels, the ongoing CHANGES Program as a reimbursement from the CARE Program, through the end of the current 2015-2017 program cycle, and may be renewed by the Commission, as needed, into the next CARE program cycle; and
- In the future, the funding for CHANGES will ideally come from the Commission's reimbursable budget because it will provide greater latitude to address a range of energy assistance needs experienced by California's low-income population, the LEP population, and population with disabilities.

On November 21, 2016, the Commission issued D.16-11-022, as modified by D.17-12-009, for implementation and funding of the CARE and CHANGES Programs.

¹⁸ D.14-08-030, Ordering Paragraph 48.

This report provides the accomplishments and expenditures for SDG&E's CARE program year (PY) 2017. At year-end 2017, there were 281,274 customers participating in the CARE Program for an overall penetration rate of 85%.

2.1. Participant Information

2.1.1. Provide the total number of residential CARE customers, including sub-metered tenants, by month, by energy source, for the reporting period and explain any variances of 5% or more in the number of participants.

Residential CARE Program Electric Customers by Month			Residential CARE Program Gas Customers by Month		
PY 2017	CARE Customers	Percentage Change	PY 2017	CARE Customers	Percentage Change
Jan	267,793	-0.53%	Jan	173,385	-1.05%
Feb	269,004	0.45%	Feb	174,563	0.68%
Mar	271,727	1.01%	Mar	175,775	0.69%
Apr	270,980	-0.27%	Apr	175,668	-0.06%
May	271,181	0.07%	May	175,972	0.17%
Jun	272,771	0.59%	Jun	176,429	0.26%
Jul	274,488	0.63%	Jul	177,450	0.58%
Aug	278,143	1.33%	Aug	179,528	1.17%
Sep	280,446	0.83%	Sep	181,012	0.83%
Oct	280,613	0.06%	Oct	181,634	0.34%
Nov	281,074	0.16%	Nov	181,195	-0.24%
Dec	281,274	0.07%	Dec	181,746	0.30%

2.1.2. Describe the methodology, sources of data, and key computations used to estimate the utility's CARE penetration rates by energy source.

SDG&E used the joint IOU methodology adopted by the Commission in D.01-03-028 for developing monthly penetration estimates in 2017. Eligibility, developed by Athens Research, for CARE and ESA Programs is based on income-by-household, including size parameters, at the small area level (e.g., block group, census tract, and ZIP+2), for each IOU territory and

statewide. As required by AB 327, eligibility household income must be less than 200% of the federal poverty rate as defined by the January Health and Human Services (HHS) Poverty Guidelines, “bundling” one- and two-person households.¹⁹

In addition to the current HHS guidelines, other sources to develop the penetration rate include current year small area vendor marginal distributions on household characteristics, Census 2010 SF3 data, Census American Community Survey 2010-2014 Public Use Microdata Sample (PUMS) data, utility meter and master meter household counts, Department of Finance Consumer Price Index series, and various Geographic Information System sources. An important change has been implemented since 2011, which involves adjusting small area (block group) income distributions to match the latest American Community Survey distributions at the Public Use Microdata Area.

To estimate eligibility, annual estimates from the block group level are aggregated to county/utility and whole utility level. SDG&E applies county/utility level eligibility factors to a new set of “technical eligibility counts”²⁰ obtaining an estimate of income/demographic eligibility in household count form.

To determine monthly program penetration, SDG&E counts the number of households (by small area, county, and overall) that are enrolled in CARE. The CARE household total, including individually metered and sub-metered occupied housing units, is divided by the total income/demographic eligibility to obtain monthly penetration.

¹⁹ Health and Human Services Poverty Guidelines <https://aspe.hhs.gov/2017-poverty-guidelines>.

²⁰ For CARE these are metered and sub-metered occupied housing units.

A refinement in 2007 made use of Census Advance Query, PUMS, and SF3 tabulations to develop estimates specific to “payer types” (i.e., individually metered, sub-metered, and non-sub-metered master meters).

In 2009, the method was augmented to better incorporate the impact of labor force changes such as unemployment and other forms of job separation, as well as positive changes that were expected to occur after the recession. The method adjusted block group marginal distributions on household income based on sub-state modeling that incorporated the Current Population Survey (CPS), Integrated Public Use Microdata Survey data, American Community Survey data, and the California Employment Development Department County and Metropolitan Statistical Area level labor force series data. This adjustment to block group income marginal is then incorporated into the otherwise “standard” estimation approach to reflect small area income changes due to labor market forces.

In 2012, Athens developed an improved method for estimation of payer status-specific eligibility. This method took into consideration American Community Survey microdata relationships between guideline status (above/below 200 percent FPG), tenure, and fuel payment relationships. These cross classifications are fitted to small area (block group) marginals to produce payer type specific distributions, which can be aggregated to various other geographical levels.

2.1.2.1. Describe how the estimates of current demographic CARE-eligibility rates, by energy source for the pre-June 1st periods, were derived.

The joint utility methodology adopted by the Commission in D.01-03-028, as described above in Section 2.1.2., was used for 2017.

2.1.2.2. Describe how the estimates of current CARE-eligible meters were derived. Explain how total residential meters were adjusted to reflect CARE-eligible meters (i.e., master meters that are not sub-metered or other residential meter configurations that do not provide residential service.).

As described previously in Section 2.1.2. above, CARE eligibility is developed by Athens Research. Athens Research develops CARE eligibility rates for small and large areas that apply to individual residential meters and sub-metered dwelling units only. Non-sub-metered master meters and other meters that do not provide residential service are not included in the “technical eligibility” meter counts. Military and university housing were also excluded from the “technical eligibility” counts.

2.1.2.3. Discuss how the estimates of current CARE-eligible households were developed.

See SDG&E’s response above in Section 2.1.2.2. The methodology is based on estimating small area (block group) level household size by income and household-age tabulations for the current year and on connecting these estimates with small area counts of households that are individually metered or sub-metered. Block group/utility-specific estimates are then disaggregated/aggregated to various geographic levels within a given utility area such as zip+2, zip, tract, county, and territory. Statewide estimates, regardless of utility boundaries, are also provided at small and large area levels.

2.1.2.4. Describe how current CARE customers were counted.

SDG&E runs a monthly report of the billing system for all accounts currently enrolled in the CARE Program that received a discount. This monthly report incorporates all CARE customer information necessary for reporting, including energy source information (electric, gas, or both) and CARE enrollment and re-certification dates.

In the case of sub-metered tenants receiving CARE discounts from their master-metered facilities, SDG&E runs a separate monthly report to count the number of sub-metered dwelling units that are flagged as being enrolled in the CARE Program.

2.1.2.5. Discuss how the elements above were used to derive the utility's CARE participation rates by energy source.

The formula for calculating CARE-penetration rates is:

$$\frac{\text{Number of CARE Customers}}{\text{Number of Estimated CARE-Eligible Households}}$$

2.1.3. Provide the estimates of current demographic CARE-eligibility rates by energy source at year-end.²¹

Electric	27.1%
Gas	26.4%

2.1.4. Provide the estimates of current CARE-eligible sub-metered tenants of master-meter customers by energy source at year-end.

Electric	19,215
Gas	14,367

²¹ Estimates of current demographic CARE-eligibility rates by energy source at year-end are found by dividing the Athens household eligibility estimate by the total residential household count.

At year-end 2017, there were 37,363 residential electric sub-metered accounts and 29,525 residential gas sub-metered accounts in SDG&E's service territory. Utilizing the methodology described in Section 2.1.2.3 – 2.1.2.5 above, it is estimated that 51% (or 19,215) of the electric residential sub-metered tenants and 49% (or 14,367) of the residential gas sub-metered tenants are eligible for the CARE program.

2.1.5. Provide the current CARE sub-metered tenant counts by energy source at year-end.

Electric	13,531
Gas	11,666

2.1.6. Provide the current CARE sub-metered penetration rates by energy source at year-end

Electric	70%
Gas	81%

2.1.7. Discuss any problems encountered during the reporting period administering the CARE Program for sub-metered tenants and/or master-meter customers.

There were six customer complaints involving sub-metered tenants and/or master metered customers. Complaints ranged from property managers about how CARE works for Mobile Home Parks to customers calling to confirm their CARE participation status. In each case, SDG&E representatives provided the information needed and adjusted bills as necessary. All customer issues were resolved satisfactorily.

2.2. CARE Program Summary

2.2.1. Please provide CARE Program summary costs.

CARE Budget Categories	Authorized Budget	Actual Expenses	% of Budget Spent
Outreach	\$3,062,862	\$2,681,048	88%
Proc., Certification and Verification	\$485,894	\$584,024	120%
Post Enrollment Verification	\$341,647	\$274,841	80%
Information Tech./Programming	\$1,636,567	\$1,560,324	95%
Pilots	\$260,340	\$246,663	95%
Measurement and Evaluation ²²	\$0	\$0	0%
Regulatory Compliance	\$236,885	\$252,718	107%
General Administration	\$789,026	\$273,139	35%
CPUC Energy Division Staff	\$56,712	\$49,996	88%
Cooling Centers	\$41,275	\$1,482	76%
Total Expenses	\$6,911,207	\$5,954,234	86%
Subsidies and Benefits	69,916,644	\$114,029,348	163%
Total Program Costs and Discounts	\$76,827,851	\$119,983,582	156%

2.2.2. Please provide the CARE Program penetration rate to date.

CARE Penetration			
Participants Enrolled	Eligible Participants	Penetration rate	Target Met?
281,274	329,763	85%	No

2.2.3. Report the number of customer complaints received (formal or informal, however and wherever received) about their CARE re-certification efforts, and the nature of the complaints.

There were six CARE recertification customer complaints reported during 2017. Three of them involved customers who had claims about issues that led to

²² PG&E is the lead IOU for the Athens Research CARE-ESA Technical Eligibility Study and SDG&E was not billed for its cost-split in 2017.

being dropped from the CARE program erroneously. SDG&E representatives identified the issues and recertified the customers and/or provided a rebill.

The three remaining customers completed the recertification process at the time of their calls. SDG&E did not rebill these customers because rebills were found to be lacking in merit.

All six customer complaints were addressed and the customers were satisfied.

2.3. CARE Program Costs

2.3.1. Discount Cost

2.3.1.1.State the average monthly CARE discount received, in dollars, per CARE customer by energy source.

Average Monthly Electric Discount	\$30.55
Average Monthly Gas Discount	\$5.01

2.3.1.2. State the annual subsidy (discount) for all CARE customers by energy source.

Electric Subsidy	\$103,112,723
Gas Subsidy	\$10,916,625

2.3.1.3. Provide the Number and Percent of Green Tariff Shared Renewables (GTSR) and Enhanced Community Renewables customer base. Also provide the average total bill discount.

In 2017, there were 161 (or 0.06%) CARE customers on GTSR and Enhanced Community Renewables.

In 2017, the average total effective CARE discount was 38%-39%.

SDG&E did not provide the percent based on “distribution” portion of bill

because the discount is not based on the distribution portion.²³

2.3.2. Administrative Cost

2.3.2.1. Show the CARE Residential Program's administrative cost by category.

Category	Total
Outreach	\$2,681,048
Processing, Certification, Recertification	\$584,024
Post Enrollment Verification	\$274,841
IT Programming	\$1,560,324
Cool Centers	\$31,482
Pilots	\$246,663
Measurement & Evaluation ²⁴	\$0
Regulatory Compliance ²	\$252,718
General Administration	\$273,139
CPUC Energy Division	\$49,996
Total Program Costs	\$5,954,234

2.3.2.2. Explain what is included in each administrative cost category.

Outreach:

Costs includes those related to printing and mailing CARE applications and documents, as well as costs related to postage, bill inserts, brochures and flyers, advertising, targeted direct mail and telephone campaigns, outreach staff labor, CBOs and door-to-door enrollment efforts and other outreach support efforts.

²³ OP 126 of D.17-12-009 directs the IOUs to provide the “average total bill discount that CARE program enrolled GTSR and Enhanced Community Renewables customers receive (in percentage terms) from the CARE program discount on the distribution portion of their bill.”

²⁴ PG&E is the lead IOU for the Athens Research CARE-ESA Technical Eligibility Study and SDG&E was not billed for its cost-split in 2017.

Processing, Certification and Recertification:

Costs in this category include processing group labor and data entry costs.

The function of the CARE processing group includes:

- 1) Scanning and indexing CARE applications;
- 2) Processing/data entering all CARE applications;
- 3) Initiating and responding to customers' inquiries regarding CARE applications/program;
- 4) Fielding telephone calls related to CARE Program participation; and
- 5) Resolving billing issues related to CARE Program enrollment.

Post Enrollment Verification (PEV):

Costs in this category include CARE processing group labor and data entry costs. The function of the PEV group includes:

- 1) Processing CARE income verification and CARE High Usage Verification;
- 2) Responding to customers' inquiries regarding CARE income verification documents; and
- 3) Resolving customer issues related to income verification.

Information Technology (IT) /Programming:

Costs include all IT system support costs to maintain the CARE system, CARE documents, CARE database, IVR, system reports, data exchange with the IOUs, and costs associated with system enhancements to comply with Commission mandates and improving operational efficiencies.

Pilots:

Costs include those associated with the contractor's administration of the CHANGES Program.

Cool Centers:

Costs include those associated with the development and printing of Cool Zone collateral pieces including translation, labor for the staff at Aging and Independence Services, minor equipment for phone head-sets, fans, logo printing for hand fans, and shipping fees for fans delivered to customers who are unable to get to a cool zone.

Measurement and Evaluation:

Costs include contract and staff labor expenses for CARE participant eligibility updates and analysis.

Regulatory Compliance:

Costs include labor and non-labor costs related to the preparation of various regulatory filings, including program applications, advice letter filings, audits, regulatory reports, comments, tariff revisions, attendance at working groups and joint utility meetings, public input meetings and other Commission hearings or meetings.

General Administration:

Costs include office supplies, market research and program management labor and expenses.

Commission Energy Division Staff Funding:

This category of expenses reflects costs incurred by the Commission's Energy Division staff in support of the Commission's authorized low income program.

2.3.3. Provide the year-end December 31 balance for the CARE balancing account.

Electric CARE	\$3,337,853 under-collected
Gas CARE	\$8,296,783 over-collected

2.3.4. Describe which cost categories are recorded to the CARE balancing account and which are included in base rates.

The general cost categories recorded to the CARE gas and electric balancing accounts include the CARE discount and the program specific administrative expenses as described above in Section 2.3.2.2. There are no costs related to the discount charged in base rates.

2.3.5. Provide a table showing, by customer class, the CARE surcharge paid, the average bill paid, the percentage of CARE surcharge paid relative to the average bill, the total CARE surcharge collected, and the percentage of total CARE revenues paid.

See CARE Table 10 in the Attachments.

2.4. Outreach

2.4.1. Discuss utility outreach activities and those undertaken by third parties on the utility's behalf including Lifeline coordination.

In 2017, SDG&E launched a new creative campaign that focused on letting qualified customers know they can save on their energy bill. The campaign intended to connect with customers by giving them one less thing to worry about. The campaign ran in English, Spanish and Asian languages, and included streaming television (TV), newspaper, digital (including paid search), email, direct mail and bill inserts.

Mass Media

Mass media allowed SDG&E to educate and connect with its customers through diversified communication mediums designed to reach a mass audience and hard-to-reach populations including customers in rural areas, seniors, customers with special needs and multilingual/multicultural customers. They serve to drive overall awareness and complement other Outreach tactics. In 2017, mass media components included print, Streaming TV, digital media, bill inserts, ethnic marketing, email, and direct mail.

Print Campaigns

SDG&E continued to run print advertising in Ethnic (African-American, Asian, Hispanic) and Rural publications. In 2017, SDG&E refreshed the print creative with the new campaign look. Samples of the new print creative are included in the Appendix A.

Streaming TV

SDG&E launched a new TV commercial campaign through streaming TV media. The 15-second spots ran on streaming (on-demand) TV with placement on Hulu (NBC), , Fox.com, ABC.com, CW.com and many others. Streaming TV is very flexible, allowing us to target our customer segments more deeply and optimize performance throughout the campaign. Additionally, through streaming TV, viewers cannot fast forward through the commercials. SDG&E ran three English and two Spanish versions of its TV commercial campaign throughout most of the year. The videos are available to view at:

<https://www.youtube.com/user/sdgeWebmaster/videos>.

Digital

SDG&E used an integrated online strategy of increasing awareness for the programs and driving online submissions through the use of paid search, display ads and video ads. Overall, SDG&E ads were seen over 25 million times throughout the year (impressions) with over 394,000 customers clicking through to the CARE/ESA Program online application.

Bill Inserts

The mandated annual CARE bilingual notification took place in July and November. All non-CARE customers who receive paper bills received the bilingual application in their SDG&E bill, while paperless bill customers were provided a link to view their monthly bill inserts. In addition, a bilingual bill

insert promoting the CARE and ESA Programs was distributed in March through the monthly bill.

Ethnic Marketing

SDG&E reached numerous ethnic segments throughout the year with a variety of mass media tactics. Latino, African American, Chinese, Vietnamese, and Filipino audiences were targeted by print and digital campaigns, with a total ethnic spend of \$154,846. Please see below for details.

**CARE/ESA
2017 Ethnic Media Recap**

Audience	Readership	Total Spent
Spanish	5,223,881	\$41,958
Chinese	951,753	\$8,400
Vietnamese	763,714	\$7,200
Filipino	1,523,685	\$18,300
African American	1,882,483	\$15,358
	10,345,516	\$91,216

Ethnic Television		
Audience	Impressions	Total Spent
Spanish	7,429,584	\$63,630

Total 2017 Ethnic Spend	\$154,846
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Email Campaigns

In 2017, in addition to refreshing emails with the new creative campaign, SDG&E began to utilize a Nurture Campaign model. The Nurture Campaigns send a series of pre-written messages over a period of time in an automated fashion which move customers closer to conversion.

Contacts receive messages based on behavioral triggers including:

- Visits to a web-page
- Clicking of a link
- Receiving an email
- Taking no action at all

The Nurture Campaign model allows us to move customers to specific message tracks based on behavior:

- Opened an email
- Did not open an email
- Clicked on a link within an email
- Visited a web-page
- Clicked on a link within a web-page

Customers may receive up to five messages (including reminders) over a 30-day period, depending on engagement level. This type of campaign can eliminate redundant messages or over marketing and increase customer engagement.

Email campaigns were designed in tandem with the corresponding awareness campaigns that featured the new creative for 2017 in order to reinforce messaging and generate familiarity amongst customers. The campaigns contained integrated messaging, directing customers to the online application process. Throughout the campaign, subject lines and content were modified based on customer behavior. Unique open rates, defined as how many people opened the email, were as high as 57%, indicating the subject lines were compelling to

customers. By comparison, the utility industry standard open rates hover around 15% and on average SDG&E typically maintains a 30-40% open rate with all emails. Higher metrics for the Nurture Campaign can be attributed to multiple relevant messages sent to the customer (from 3-6 messages) over a 30-day period vs. one email sent per month with our traditional campaigns.

Direct Mail Campaigns

SDG&E used direct mail to geographically target audience segments using Athens Research and SDG&E Segmentation to identify areas with mid-high propensity for program participation. SDG&E conducted 18 direct mail campaigns in 2017 (12 for CARE and six for ESA). The direct mail postcard encouraged recipients to call SDG&E's toll-free enrollment number or to apply through SDG&E's online application. Approximately 23,310 customers enrolled in CARE and 4,258 customers enrolled in ESA through this direct mail campaign out of the 176,438 customers that were sent the mailer, representing a 7.6% overall response rate. Samples of the creative from these campaigns can be found in the Appendix A.

Lifeline Collaboration

In December 2017, SDG&E modified its website to include information on Lifeline and provided the Lifeline toll-free phone number on SDGE.com within the Low-Income Assistance section of the website. The enhancement to SDG&E's website provides a resource for its customers seeking telephone bill

assistance which can benefit the customers. In 2018, SDG&E plans to further refine its website in consultation with the Lifeline Administrator.

Door-to-Door

SDG&E's outreach efforts with third party contractors involved reaching out to multicultural/multilingual, low-income, and disabled customers who are eligible for the CARE/FERA/ESA programs utilizing a door to door strategy. This strategy was developed by looking at data analysis for new CARE prospects and selecting areas where geographically a door to door representative would be most effective. In order to target these customers effectively with the best resources, SDG&E collaborates with The Harris Group (THG), a third party Diverse Business Enterprise (DBE) vendor, to implement this door-to-door campaign. THG canvasses these neighborhoods to directly interact with customers, in-language when necessary, to enroll them in the program. This door-to-door and multicultural effort led to over 8,500 completed applications, over 3,890 CARE enrollments and 1,734 CARE re-certifications.

Live Call Campaign

THG, utilizing the data analysis from the new CARE prospect list, also implemented an outbound call campaign to reach out to potentially eligible customers who reside in harder to reach areas (e.g., rural and low density) based on zip code. THG's outbound call campaign also included a CARE recertification campaign. For 2017, THG Live Call Campaign efforts resulted in

28,074 completed applications and contributed to over 17,000 new CARE enrollments and over 8,000 re-certifications, resulting in a conversion rate of 61%.

Community Outreach & Engagement

Community outreach allows SDG&E to connect and directly engage customers in energy savings solutions in the communities where they work and live. These outreach activities provide information about our CARE program to the customers that are eligible. SDG&E established partnerships with social service entities (e.g. 2-1-1 San Diego, County Health and Human Services Agency (HHSA) and Cool Zones) in these communities in order to connect to those customers who are unaware, concerned, afraid or have a language barrier. Establishing partnerships with social service agencies and nonprofit organizations to deliver presentations, workshops/trainings, and participate at community events, helps SDG&E secure enrollments through an organization that customers trust. These efforts resulted in 5,847 CARE applications, 2,892 CARE enrollments and 1,400 CARE re-certifications.

CARE Partners (Capitation Agencies)

SDG&E partners with social service community organizations that serve low-income and in-need clients every day. Agencies such as Women, Infants, and Children (WIC) are able to enroll customers through their intake process using the Commission adopted categorical qualifications for enrollment. Intake

agencies such as CalFresh/Supplemental Nutrition Assistance Program (SNAP), National School Lunch Program, Low-Income Home Energy Assistance Program (LIHEAP), Medicaid/Medi-Cal for Families A & B, etc., often provide a single point of contact for client information required by the Commission to enroll customers into program. In 2017, SDG&E worked closely with 19 partner agencies to enroll customers in the CARE and FERA Programs. These partners contributed to 3,291 CARE applications, 1,148 CARE enrollments and 1,310 CARE re-certifications in 2017.

Energy Solutions Partner Network

SDG&E continues to work with an established network of more than 250 nonprofits and CBOs, collectively called the Energy Solutions Partner Network. This network helps coordinate enhanced outreach efforts, including customized messaging, social media posts, special events, and promotions. Largely grassroots, multicultural, and neighborhood centric, these organizations are diverse and provide direct services to populations including seniors, special needs/disabled, low income and young families. In 2017, over 2,000 activities were coordinated through this partner network to promote the CARE and ESA Programs. Of these activities, CARE and ESA Programs were promoted in 381 social media messages – Facebook, Twitter and Instagram – by SDG&E’s Energy Solutions Partner Network. The Energy Solutions Partner Network’s activities were able to bring in 850 completed CARE applications, 263 CARE enrollments and over 350 CARE re-certifications.

Community Events & Presentations

SDG&E coordinates participation at hundreds of community events and presentations throughout its service area. Many of the partnerships established through CBOs host events to help the community with many social services such as high blood pressure checks, free flu shots, and dental check-ups. SDG&E believes this is an excellent opportunity for SDG&E to participate since the events often attract low-income and fixed income audiences. These events are for families with children, seniors, and disabled or special needs populations. These community events also service our rural, Native American and harder to reach population. While these events and presentations may not bring in large numbers of program enrollments, they serve a greater need of educating and engaging customers. In 2017, SDG&E promoted CARE and other customer assistance solutions at over approximately 1,156 presentations and events.

Customer Contact Center

SDG&E's Customer Care Centers assist over a million customers with various energy needs. Customers are provided with information about the CARE and ESA Programs in both English and Spanish, while waiting to see or speak with an Energy Service Specialist (ESS). This is done through signage at our branch offices or via the IVR System over the phone. ESSs complete enrollments for customers who qualify for the CARE Program. This helps to streamline the enrollment process while providing excellent customer service. In 2017, the Customer Care Centers completed 1,632 applications and contributed to

approximately 1,226 CARE enrollments and 113 re-certifications, yielding a conversion rate of 75%.

Branch Offices

SDG&E's Customer Assistance outreach team collaborates with the branch office staff and bill payment locations to provide training and presentations on the CARE/FERA, and ESA Programs. In 2017, the outreach team and branch offices executed 18 customer engagement fairs that were held at branch office locations in SDG&E's service territory (Chula Vista, El Cajon, Market Creek, National City, and Escondido) on high traffic days to help customers enroll in CARE. In 2017, branch offices brought in approximately 5,969 completed CARE applications and contributed to over 4,890 new CARE enrollments yielding a conversion rate of 82% along with 337 re-certifications.

2.4.1.1. Discuss outreach to CARE customers for the Home Energy Report, including percentage participation.

In 2017, there were approximately 600,000 customers currently receiving the Home Energy Reports (HERs). Of those customers, 129,350 are enrolled in CARE (representing 22%). SDG&E sent HERs to customers on a quarterly basis and electronic HERs emails were sent monthly. The reports educate customers on their energy consumption, provide energy saving tips and, when applicable, encourage enrollment in CARE. SDG&E met the 10% goal for CARE customers in this rate education program.

Percent of HER recipients that are also on CARE	22%
Percent of CARE customers receiving Home Energy Report	46%

2.4.2. Discuss the most effective outreach method, including a discussion of how success is measured.

SDG&E continues to look for the most effective ways to communicate to customers. As stated in Section 2.4.1, in 2017 SDG&E utilized several different outreach methods to enroll eligible CARE customers. Each outreach methods' effectiveness is measured differently depending on the method. Some outreach methods can be measured on open rates, number of impressions, number of customers educated and informed of the program and number of customers enrolled. Of the different outreach methods, it is hard to define which one was the most effective because it can take several marketing impressions before a customer takes action.

However, if we are to base outreach method effectiveness on the number of CARE enrollments and the conversion rate the most successful and effective method was "The Live CARE Call Campaign" administered by THG. This campaign resulted in 20,660 submitted CARE applications and enrolled 16,760 new CARE customers for 2017 resulting in an 81% conversion rate. This campaign also resulted in 1,947 CARE re-certifications.

In order to measure the success of some outreach methods, SDG&E provides each CARE partner, contractor and activity a unique source code number that they submit with each CARE application. This allows SDG&E to track each CARE application, CARE Recertification and CARE Enrollment to the correct source.

2.4.3. Discuss barriers to participation encountered during the reporting period and steps taken to mitigate them.

SDG&E's CARE program continues to face a number of barriers to program participation and must constantly evaluate and sometimes shift its focus in order to determine ways to counteract these challenges. In 2017, in order to gain a better understanding of these barriers from the customer's perspective, the program implemented customer surveys. The survey results revealed that the majority of participants remain satisfied with the CARE program (94%) and expect to continue participating. The surveys also provided the following insights: 1) Most CARE customers would prefer the renewal contact by email, direct mail or telephone (with a live representative) and find any of these methods appropriate; 2) Some customers found the enrollment process challenging because they were not certain on how to calculate the income; 3) SDG&E's CARE Program still faces barriers to program participation with non-US citizens who may be reluctant to share personal information.

Based on the customer survey information, SDG&E will be working on the following tactics in 2018.

1. Send customers a renewal email 30 days prior to sending a letter.
2. Develop a short video (or multi-media tactic) that can be used on both the SDGE.com website and social media channels that includes a call to action to "Apply Now" with a direct link to the application.

Third Party Outreach

Hardest to Reach & Unwilling

SDG&E has developed numerous resources to maximize program awareness in these harder to reach communities. The tactics utilized are: THG door-to-door outreach,

THG Live CARE Call Campaign, events through Feeding America's Mobile Pantry and through other non-profit organizations. These tactics have allowed SDG&E to be visible in rural and language challenged areas. Continuing to work in the hard to reach communities through SDG&E's outreach partners, and participation in multicultural/multilingual events, such as the Feeding America Mobile Food Pantry, will be a key tactic utilized in reaching these hardest to reach customers.

2.4.4. Discuss how customer data CARE and other relevant program information is shared by the utility with other utilities sharing its service territory.

SDG&E has a 2-way sharing of data for customers in Orange County who are served by both SoCalGas and SDG&E. In 2017, SDG&E received zero enrollments through this effort. In addition, SDG&E shares CARE customer data with California American Water (CalAm) to assist in identifying customers for their customer assistance programs. In 2017, SDG&E provided 43,911 leads in March and 45,643 in September to CalAm.

2.4.5. Discuss how CARE customer data and other relevant program information is shared within the utility, for example, between its Energy Savings Assistance Program and other appropriate low income programs.

SDG&E implemented system enhancements to the CARE System and the HEAT System to improve customer experience, improve CARE penetration and provide qualifying leads for ESA. Upon an eligible enrollment or recertification for the CARE Program, the CARE System will automatically send an ESA lead to the HEAT System if determined eligible based on the prior treated date. Upon an eligible income verification for the CARE Program, an ESA lead is automatically created stating "CARE Income Certified," letting the outreach agency know they do not need to perform the income

eligibility process for this customer. In turn the HEAT System sends the CARE System ESA eligibility upon an ESA enrollment. The CARE System determines if the customer will be auto-enrolled, income certified or recertified in the CARE System based on their current CARE status. This automation has increased the number of qualified leads and CARE enrollments as well as reduced the number of letters sent for CARE recertification and PEV.

2.4.6. Describe the efforts taken to reach and coordinate the CARE Program with other related low income programs to reach eligible customers.

SDG&E partnerships with CBOs and social service providers throughout San Diego continues to be an effective form of enrolling customers into the CARE/FERA and ESA programs. These organizations are involved daily with customers that meet our income or categorical qualifications and provide a one stop source for resources. Some of these organizations are: WICs, CalFresh, LIHEAP, Covered California and California Lifeline. Other partners include the CARE Partner Program with social service agencies and 2-1-1 San Diego, SDG&E's Energy Solutions Partner Network consisting of over 250 grassroots organizations, and leveraging the efforts of LIHEAP contractors. These programs were leveraged through presentations, events, workshops, and customized partner network messaging.

2.4.6.1. Track Costs of AB 793 related Energy Management Technologies programs (identify all of the programs or initiatives that will be able to benefit from the availability of the end-use and electric usage profiles, and to coordinate with the relevant proceedings so that the relevant costs can be considered in those proceedings' cost-effectiveness decision-making).

SDG&E is in the process of updating its In-Home Education curriculum for implementation in 2019 to also include educating customers about their electric usage profiles. No cost was incurred by the program in 2017. Additionally, SDG&E will be including measures in the 2018 mid-cycle advice letter which will allow customers to use technology to participate in a DR program in 2019.

SDG&E is also in the process of finalizing the bid selection for its HAN, P4P and Small/Medium Business P4P programs. SDG&E expects to have vendor selection completed and program ramp up by the end of the second quarter of 2018. SDG&E's Marketplace also has a link to Advanced Metering Infrastructure (AMI) services to facilitate Green Button connect efforts consistent with direction from Assembly Bill (AB) 793 located at: <https://marketplace.sdge.com/>.

2.4.7. Describe the process for cross-referral of low income customers between the utility and CSD. Describe how the utility's CARE customer discount information is provided to CSD for inclusion in its federal funds leveraging application. (Note: These agreements are limited to sharing 1-800 phone numbers with customers and providing CARE benefit information for the federal fiscal year, October 1 of the current year through September 30 of the subsequent year. There are no tracking mechanisms in place to determine how many customers contact the other programs or actually become enrolled in other program(s) as a result of these agreements.)

SDG&E continues to find value in leveraging with partners such as CSD.

This partnership shows our community of San Diego how involved we are in verifying that we utilize every effort possible to reach out to customers in need.

SDG&E promotes the CSD's LIHEAP bill payment assistance and weatherization services and also includes their phone number on our applications and program materials so that customers can call for additional information or services that they may need to keep themselves healthy and safe in their home. SDG&E CARE staff assists customers so that they are also aware of the services offered through CSD and refers customers to CSD for additional bill assistance through the Home Energy Assistance Program (HEAP). Lastly, SDG&E's agreement with 2-1-1 San Diego requires part of the customer screening to include referral to Low Income Home Energy Assistance Program (LIHEAP) agencies Campesinos Unidos, Inc. (CUI) and Metropolitan Area Advisory Committee (MAAC), as appropriate. In 2017, 2-1-1 San Diego handled 49,386 utility-related calls and referred 15,934 of those to LIHEAP agencies.

2.4.8. Discuss any recommendations to improve cost-effectiveness, processing of applications, or program delivery. Discuss methods investigated or implemented by the utility or third parties under contract to the utility to improve outreach and enrollment services to non-participating households in the prior year. Provide cost-effectiveness assessments, if available.

Significant improvements include the following:

1. SDG&E's Customer Contact Center can now enroll customers in CARE through the CARE Online Application. The customer's information is automatically authenticated through a link to the on-line application making this process more efficient for the Customer Contact Center representatives to process the application.

2. SDG&E also made improvements to its My Account messaging. Using the existing probability model designed for CARE PEV, the residential customers have been assigned a probability score determining their likelihood of being eligible for the CARE Program. Upon customer login to SDG&E My Account site, the customer probability score determines if a message should be displaying stating "you are likely to be eligible for the CARE Program" and a link to the CARE on-line application to enroll. This will increase focus on the eligible population. The program is showing positive results with approximately 600 new enrollments a month.

- December 2017, the CARE on-line application validates on the co-applicant name as well as the applicant's name.

3. To ensure SDG&E utilized the best outreach and enrollment methods, SDG&E issued an RFP for the programs in 2017. The goal was to ensure SDG&E chose the best option for outreach. This RFP process resulted in SDG&E moving from two third-party outreach contractors to one, THG. This process also allowed THG to shift more of their focus to their Live Call Campaign in order to continue to reach more customers who might be eligible for the programs. SDG&E continues to evaluate methods based on cost and how to reach all eligible customers.

- THG now enrolls and recertifies a majority of their customers through the online portal. This increases efficiency since SDG&E no longer has to process these applications.
- THG also contacts customers within the hours of 3pm-8pm on weekdays and on weekends from 9am-3:30pm, allowing them to achieve a higher rate of response. They make a few contacts at different hours in an attempt to reach the customer and successfully enroll them.

- THG also quality assures their applications by requiring that a second representative speak to the customer immediately following the initial interaction to make sure the first representative accurately recorded the customer's information.

2.5. Processing CARE Applications

2.5.1. Describe the utility's process for recertifying sub-metered tenants of master-meter customers

In general, tenants of sub-metered facilities follow similar recertification guidelines as individual metered dwellings. Sub-metered tenants are provided with a two-year or a four-year recertification period, depending on whether they can be identified as fixed income tenants.

Once sub-metered tenants are due to recertify, they are provided with a mailed renewal request.

If no response is received within 60 days, SDG&E will mail a second request to the tenants prior to removal.

2.5.2. Describe any contracts the utility has with third parties to conduct certification, re-certification and/or verification on the utility's behalf. Describe how these third-party efforts compare to the utility's efforts in comparable customer segments, such as hard-to-reach or under-served. Include comparisons of effectiveness and cost-effectiveness of comparable customer segments, if available.

SDG&E finds that collaboration with third party contractors is a necessary component to successfully reaching and enrolling hard-to-reach and under-served customers. In 2017, SDG&E partnered with several third parties to conduct certification and re-certification of CARE customers on the utilities behalf.

SDG&E contracted THG to do a number of campaigns including: door-to-door, multicultural outreach, Live Call Campaign, CARE Re-certification Campaign and Zip Code Campaign resulting in 20,990 CARE Enrollments and 10,498 Re-certifications.

FocusCom was contracted to do multicultural outreach which included them going to locations that may have large populations of CARE-eligible customers including: ethnic markets, grocery stores (targeting low income families), unemployment offices, health fairs, clinics, laundry mats and community centers. FocusCom's efforts led to 1,441 CARE enrollments and 3,048 CARE re-certifications.

SDG&E also partnered with 2-1-1 San Diego, a 24-hour resource and information center connecting people with community, health and disaster services. Customers often contact 2-1-1 San Diego in an emergency to locate important resources including bill assistance programs, food, and shelter. The 2-1-1 San Diego partnership lead to 2,455 CARE enrollments and 854 CARE re-certifications.

SDG&E also does outreach activities as detailed in section 2.4.1. These activities include: mass media, print campaigns, streaming TV, digital, bill inserts, ethnic marketing, email campaigns, direct mail campaigns, community outreach & engagement, CARE partners, Energy Solutions Partner Network, community events & presentations, customer contact center and branch offices.

SDG&E measures the effectiveness of this program in two ways. The first measure of success is generating overall program education and awareness through mass media and community outreach tactics. The second is customer engagement to generate and measure enrollment. For these harder-to-reach and underserved audiences, it is important to utilize multiple tactics as stated above. It is difficult to evaluate cost-effectiveness per tactic, given that some of these

tactics cannot be directly sourced to the actual customer enrollment and/or that the customer may experience multiple tactics prior to completing recertification as detailed in Section 2.4.2. This is especially true for mass media tactics like television, print and online advertisements. In 2017, SDG&E's on-line advertising for example garnered over 876,000 impressions (the number of times an SDG&E ad was seen by an on-line user) while ethnic print advertising had a readership of over 10.3 million and ethnic television garnered over 7.5 million impressions. All mass media channels encouraged customers to call SDG&E's toll-free number or visit SDG&E's website to complete an on-line application. It is hard to determine how many impressions it took for customers who enrolled through the toll free and on-line application process. However, industry experts have stated that it may take between 7-13 touches before a consumer takes action and responds to a tactic.²⁵

2.6. Program Management

2.6.1. Discuss issues and/or events that significantly affected program management in the reporting period and how these were addressed.

In 2017, SDG&E created 20 new exception reports to improve program governance and quality control. In addition, these reports will help mitigate potential issues and reduce the need for customer inquiries and rebills.

CHANGES Program

D.15-17-047 transitioned from CHANGES pilot to CHANGES program. The CHANGES program is funded through the CARE Program through the 2017-2020 program

²⁵ Accenture, Actionable Insights for the New Energy Consumer, 2012.

cycle. The Commission provided the IOUs with a list of CBOs to help with any customer inquiries regarding the CHANGES Program. The CBOs work on the customer's behalf. The selection of CBOs is not based on any particular decision. The contractor selects CBOs and subcontracts them based on its own criteria. The Commission chose CBOs that target specific communities and offer other programs that will complement SDG&E's services, and have the appropriate resources to support the programs.

SDG&E has two within its service territory as shown below:

1. Alliance for African Assistance
2. Deaf Community Services of San Diego

The lists of CBOs were also shared with SDG&E's internal Call Center and outreach team. The IOUs and CHANGES teams met every month to discuss program effectiveness.

2.7. Pilots

There were no pilots in 2017.

2.8. Studies

No studies were authorized with CARE funding; however, the LINA, discussed in Section 1.10 of this report, includes research questions related to CARE.

2.9. CARE Restructuring Working Group

In the fourth quarter of 2017, SDG&E supplied the CARE Restructuring Working Group with a final dataset. The purpose of the CARE dataset is to determine if and how CARE should be restructured. On December 20, 2017, the Commission issued a Ruling²⁶ suspending the procedural schedule for the CARE Restructuring Track of Residential

²⁶ E-Mail Ruling Suspending Procedural Schedule for CARE Restructuring Track in R.12-06-013.

Rate Reform until further notice. SDG&E anticipates continuing to meet and discuss CARE Restructuring in 2018.

2.10. Miscellaneous: Describe coordination efforts with the California Advanced Services Fund's new Broadband Public Housing Account.

The California Advanced Services Fund (CASF) was established by the CPUC in 2007 to provide grants to telephone corporations in unserved/underserved areas. On October 15, 2017 the Governor signed AB 1665 which approved funding for Broadband infrastructure projects.

In 2017, SDG&E partnered with 2-1-1 San Diego and California Emerging Technology Fund (CETF) for a pilot program. The costs of the pilot were shared by SDG&E and CETF). SDG&E's portion of the cost was funded through a charitable contribution and not through CARE budgets. The pilot program utilized 2-1-1 San Diego's utility assessment to screen clients. All callers to 2-1-1 San Diego, who were seeking utility payment assistance (water, gas, or electricity service) or information about discount products from SDG&E, were also asked about their home high-speed Internet (broadband) access and connectivity status. Any callers who did not have home broadband service, were interested in subscribing, and were eligible for a reduced-cost broadband offer were referred to one of the affordable subscriptions offered by AT&T or Cox. Callers were asked about their access to various computing devices at home and digital literacy skills. Callers needing and requesting appropriate affordable devices or digital literacy training were referred to existing resources within the 2-1-1 network where those needs can be met.

This CETF pilot program successfully connected 1,302 clients to low-cost internet providers (AT&T Low Cost Internet or Cox Connect2Compete), services that

offer digital literacy training, free or low-cost computers, and the Federal Lifeline Program, which offers affordable devices. Additionally, the pilot program screened and educated nearly 4,500 clients about low-cost internet and how one's ability to access the internet impacts their entire well-being.

3. CARE EXPANSION PROGRAM

3.1. Participant Information

3.1.1. Provide the total number of residential and/or commercial facilities by month, by energy source for the reporting period.

See CARE Table 12 - CARE Expansion Program.

3.1.1.1.State the total number of residents (excluding caregivers) for residential facilities, and for commercial facilities, by energy source, at year-end.

Facility Type	Electric	Gas
Commercial	6,395	5,101
Residential	1,963	1,187

3.2. Usage Information

3.2.1. Provide the average monthly usage by energy source per residential facility and per commercial facility.

<u>Commodity</u>	<u>Residential</u>	<u>Commercial</u>
Gas	31	377
Electric	559	9,470

3.3. Program Cost

3.3.1. Administrative Cost (Show the CARE Expansion Program's administrative cost by category).

In 2017, SDG&E's Expanded CARE program costs totaled \$25,114.

These costs are associated with application processing. Costs for Program

Management and Outreach are not significant and are included in the general CARE program budget.

3.3.1.1. Discount Information

3.3.1.2. State the average annual CARE discount received per residential facility by energy source.

Residential Facility Gas Discount	\$91.54
Residential Facility Electric Discount	\$624.44

3.3.1.3. State the average annual CARE discount received per commercial facility by energy source.

Commercial Facility Gas Discount	\$699.88
Commercial Facility Electric Discount	\$4,011.07

3.4. Outreach

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

SDG&E has skilled and knowledgeable Customer Solutions Advisors in both the residential and business outreach groups that promote programs such as Expanded CARE with partners who manage multifamily low-income housing. The SDG&E outreach team also promotes Expanded CARE through general outreach activities including events and presentations and also through the Energy Solutions Partner Network.

Discuss each of the following:

3.4.1.1. Discuss the most effective outreach method including a discussion of how success is measured.

The most effective outreach method to promote Expanded CARE is through SDG&E's skilled and knowledgeable customer facing team, consisting of assigned Account Executives, Customer Solutions Advisors and Outreach Advisors. These groups work directly with customers who may be eligible for Expanded CARE and with CBO's who work directly with clients who may be eligible for CBO's.

3.4.1.2. Discuss how the CARE facility data and relevant program information is shared by the utility with other utilities sharing service territory.

The shared territory between SDG&E and SoCalGas is located in Southern Orange County. The two utilities share relevant program information on Expanded CARE facilities. SDG&E has three qualified Expanded CARE facilities in the overlapping service territory.

3.4.1.3. Discuss barriers to participation encountered in the prior year and steps taken to mitigate these, if feasible, or not, if infeasible.

The barrier to participation for Expanded CARE tends to come from the ability for these facilities to meet the guidelines – specifically 100% resident eligibility and non-profit status of the organization. In 2017, Outreach worked with the Assigned Account Executive to make sure eligible customers were enrolled. SDG&E also promoted the program through general outreach activities and through the Energy Solutions Partner network.

- 3.4.2. **Discuss any recommendations to improve the cost-effectiveness, processing of applications, or program delivery. Discuss methods investigated or implemented by the utility or third parties on the utility's behalf to improve outreach and enrollment services to non-participating facilities in the prior year. Provide cost-effectiveness assessments, if available.**

SDG&E did not implement any system enhancements in 2017. However, SDG&E does have plans to automate the recertification process, which is currently handled manually. This will reduce the program's administrative burden.

3.5. **Program Management**

- 3.5.1. **Discuss issues and/or events that significantly affected program management in the reporting period and how these were addressed.**

SDG&E did not experience any significant program management issues in the 2017 reporting period.

4. **FUND SHIFTING**

- 4.1. **Report Energy Savings Assistance Program fund shifting activity that falls within rules laid out in Section 20.1 of D. 08-11-031 as modified by D.10-10-008, 16-11-022, and D.17-12-009.**

On April 20, 2018, SDG&E filed Advice Letter SDG&E's AL 3212-E/2664-G requesting authorization to shift additional funds into In-Home Education. The budget overage was mainly due to SDG&E's ability to exceed the number of homes it planned and budgeted to serve in 2017. SDG&E planned and budgeted to treat 20,316 homes in 2017 and exceeded the goal, treating a total of 21,677²⁷ homes in 2017, which is 1,361 more homes than planned. Total over authorized budget for In-Home Education is

²⁷ In its Advice Letter, the number of homes treated reflected 21,674, however it was subject to adjustment based on this Annual Report. In 2017, the homes treated is 21,677.

Footnote continued on next page

\$75,629²⁸, therefore SDG&E requested to shift \$37,814 in gas and \$37,814 in electric to the In-Home Education subcategory from unspent 2009-2016 ESA program funds.

4.1.1. Report CARE fund shifting activity that falls within rules laid out in Section 20.1 of D. 08-11-031 as modified by D.10-10-008, D.16-11-022, and D.17-12-009.

During 2017, SDG&E shifted CARE funds in accordance with the rules set forth in D.08-11-031 as modified by D.10-10-008, D.16-11-022, and D.17-12-009, which granted the IOUs authority to shift funds between the CARE Program categories. SDG&E leveraged excess funds in the General Administration category to cover overages in the Processing, Certification and Recertification, and Regulatory Compliance categories. A total of \$113,963 from General Administration was shifted to cover \$98,130 overage in Processing, Certification and Recertification, and \$15,833 overage in Regulatory Compliance.

4.1.2. Was there any Energy Savings Assistance Program or CARE fund shifting activity that occurred that falls OUTSIDE the rules laid out in Section 20.1 of D. 08-11-031 as modified by D.10-10-008, D.16-11-022, and D.17-12-009?

There was no ESA Program or CARE Program fund shifting activity that occurred that falls outside of the rules laid out in the Section 20.1 of D.08-11-031, as modified by D.10-10-008, D.16-11-022, and D.17-12-009.

²⁸ Total dollars are rounding by \$1 from the Electric Department and Gas Department funds.

5. COMMONLY USED ACRONYMS


CARE	California Alternate Rates for Energy
CBO	Community-Based Organization
CFL	Compact Fluorescent Lamp
CPUC	California Public Utilities Commission
CSI	California Solar Initiative
D.	Decision
CSD	California Department of Community Services & Development
DDTP	Deaf and Disabled Telecommunications Program
DRP	Demand Response Program
DSM	Demand Side Management
EE	Energy Efficiency
ESA	Energy Savings Assistance
FERA	Family Electric Rate Assistance
HEAT	Home Energy Assistance Tracking
IHD	In Home Display
IOU	Investor-Owned Utility
kW	Kilowatt
kWh	Kilowatt Hour
LIEE	Low Income Energy Efficiency
LIHEAP	Low Income Home Energy Assistance Program
MOU	Memorandum of Understanding
mW	Megawatt
mWh	Megawatt Hour
NGAT	Natural Gas Appliance Testing
OP	Ordering Paragraph
PCT	Programmable Communicating Thermostat
PEV	Post Enrollment Verification
PFM	Petition for Modification
PG&E	Pacific Gas & Electric Company
PPP	Public Purpose Program
PY	Program Year
SCE	Southern California Edison
SDG&E	San Diego Gas & Electric Company
SoCalGas	Southern California Gas Company
TDD	Telecommunications Device for the Deaf
TRC	Total Resource Cost Test
UC	Utility Costs
SSI	Supplemental Security Income
SSD	Supplemental Security Disability
SSP	Social Security Pension

6. APPENDIX A – SAMPLE COLLATERAL MATERIALS

ESA PROGRAM

ESA Program email

Take advantage of no cost - appliance, lighting and other upgrades - Apply today!




Receive Home Upgrades at No Cost

See if you Qualify

APPLY TODAY

As a CARE customer, you may be eligible for no-cost energy-efficient upgrades for your home.



Whether you rent or own, you could be eligible to receive free energy-efficient home improvements that can make your home more comfortable and save you money now and for years to come.

Through the Energy Savings Assistance Program, our authorized contractors will come to your home and may provide, at no-cost:

- New, energy-efficient lighting
- Repair or replacement of doors and windows
- Microwaves, refrigerators and high-efficiency washers*
- Insulation, weatherstripping and caulking

START THE APPLICATION

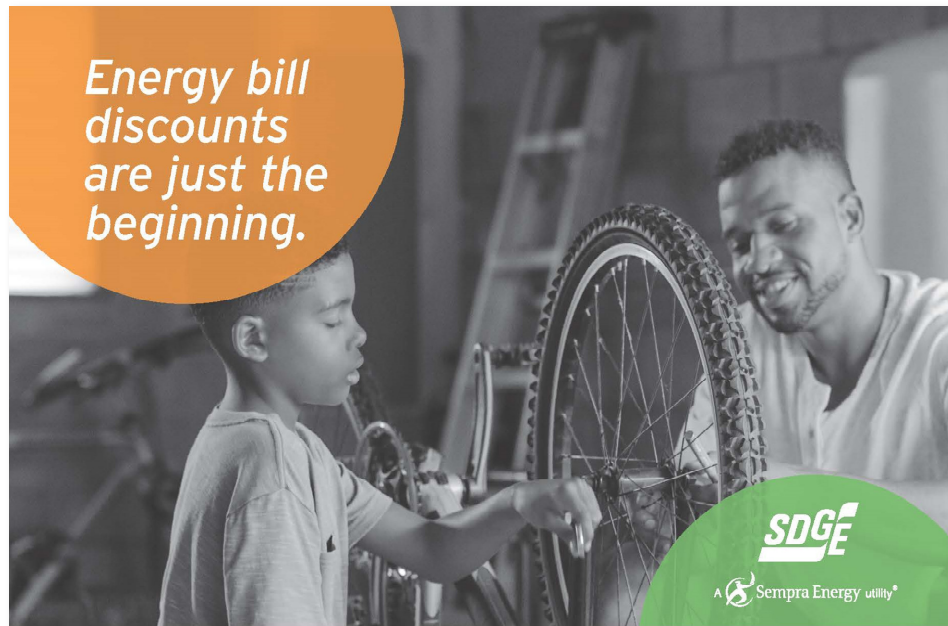
You will need your 10 digit account number found on your SDG&E® bill.

To learn more, connect at sdge.com/esap, or schedule an appointment by calling 1-866-597-0597

Get Money Back with the California Earned Income Tax Credit:

The Earned Income Tax Credit is modeled after a federal credit that helps give money back to working families. The amount of the cash-back tax credit depends on your income and your family size. To find out if you qualify visit CalEITC4me.

ESA Programpostcard



CARE PROGRAM

Print Ads



30%
BILL SAVINGS

*Means one less
thing to worry
about.*

Get started now.

If you're on a limited income, or you have financial challenges, we want to help. You may qualify for a monthly bill discount of 30% or even more. We can also help you become more energy efficient with free home upgrades.

To learn more about our assistance programs visit us at sdge.com/billsavings. Or call 1-877-646-5525.



High energy use could result in removal from the program.

These programs are funded by California utility customers and administered by San Diego Gas & Electric under the auspices of the California Public Utilities Commission.



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30%
BILL SAVINGS

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**30% DE AHORRO
EN LA FACTURA**

**Significa una
preocupación
menos.**

**Empiece ahora
mismo.**

Si tiene un ingreso limitado o atraviesa dificultades económicas, queremos ayudar. Puede tener derecho a recibir un descuento en la factura mensual de 30% o hasta más. También podemos ayudarle a volverse más eficiente en energía con mejoras gratuitas en el hogar.

Si desea conocer más acerca de nuestros programas de asistencia, visítenos en sdge.com/ahorro. O llame al 1-877-646-5525.



El consumo elevado de energía podría dar como resultado el que se le retire del programa.

Estos programas están financiados por los clientes de las empresas de servicios públicos de California y administrados por San Diego Gas & Electric, bajo los auspicios de la Comisión de Servicios Públicos de California.



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Postcard/Mailer



Rate comparison letter



December 4, 2017

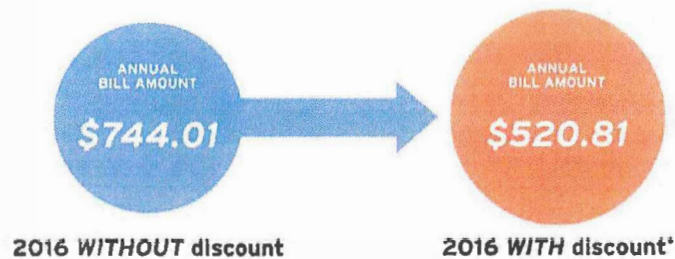
*How much could
you have saved on
your energy bill?*



Account number: _____

Dear _____,

You may qualify to save 30% or more on your energy bill. Here's how much you could have saved last year on your energy use at _____.



Based on 4020 kilowatt hours for 2016

Based on your 2016 energy use, you could have had an annual savings of approximately **\$223.20*** on your bill. Get your savings now. Sign up at sdge.com/care or call 1-877-646-5525 to see if you qualify.

Sincerely,

Rebecca Baez
Customer Assistance Programs


Qualification is based on income or participation in certain public assistance programs. High energy use could result in removal from the program.

*Based on your personal 2016 energy use with an average CARE discount of 30% applied.

001009

CARE email

See if you qualify for the CARE discount




30%
BILL SAVINGS
Means one less thing to worry about.

If you're on a limited income you may qualify for the CARE discount.


This monthly bill discount can save you 30% or more. Simply fill out our form to see if you are eligible.

[APPLY TODAY](#)

To learn more about our assistance programs [visit us online](#) or call 1-877-646-5525.



If you're not already paying your bill online, you can set this up in [My Account](#).



Qualification for CARE is based on household income guidelines. High energy use could result in removal from the program. These programs are funded by California utility customers and administered by San Diego Gas & Electric under the auspices of the California Public Utilities Commission.

This email has been sent to smoyer@semprautilities.com as a promotional communication. To unsubscribe from emails like this, please [click here](#). To manage your email subscriptions please [click here](#). SDG&E® values your privacy, view our [privacy policy](#) and [privacy notice](#).

Having trouble seeing images, [click here](#) to view the web-version.

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8330 Century Park Court, San Diego, CA 92123

7. APPENDIX B: Mid-Cycle Working Group

Initial Recommendations for Specific Tasks Identified in D.16-11-022



2017%20AR%20Atta
chment%20-%20MCV

8. APPENDIX C: ENERGY SAVINGS ASSISTANCE PROGRAM TABLES AND CARE TABLES

Summary Table – ESA Program and CARE Program

ESA Program – Table 1 – Overall Program Expenses

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

ESA Program – Table 2A - Expenses & Energy Savings by Measures Installed: CSD Leveraging

ESA Program – Table 2B - Expenses & Energy Savings by Measures Installed: MF Common Area

ESA Program – Table 3 – Cost Effectiveness

ESA Program – Table 4 – Detail By Housing Type and Source

ESA Program – Table 5 – Direct Purchases & Installation Contractors

ESA Program – Table 6 – Installation Cost of Program Installation Contractors

ESA Program – Table 7 – Expenditures by Cost Elements

ESA Program – Table 8 – Homes Unwilling/Unable to Participate

ESA Program – Table 9 – Life Cycle Bill Savings by Measure

ESA Program – Table 10 – Energy Rate Used for Bill Savings Calculations

ESA Program – Table 11 – Bill Savings Calculations by Program Year

ESA Program – Table 12 – Fund Shifting

ESA Program – Table 13 – Categorical Enrollment

ESA Program – Table 14 – Leveraging and Integration

ESA Program – Table 15 – Lighting

ESA Program – Table 16 – “Add Back” Measures

ESA Program – Table 17 – Expenditures for Pilots and Studies

ESA Program – Table 18 – Miscellaneous (2nd Refrigerators, Education Only, A/C Cycling, etc.)

CARE Program – Table 1 – CARE Overall Program Expenses

CARE Program – Table 2 – CARE Enrollment, Re-certification, 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 – Re-certification Results

CARE Program – Table 7 – Capitation Contractors

CARE Program – Table 8 – Participants per Month

CARE Program – Table 9 – Average Monthly Usage & Bill

CARE Program – Table 10 – CARE Surcharge & Revenue

CARE Program – Table 11 – CARE Capitation Applications

CARE Program – Table 12 – CARE Expansion Program

CARE Program – Table 13 – CARE High Usage Verification Results

CARE Program – Table 13A – CARE Customer Usage and ESA Program Treatment

CARE Program – Table 14 – CARE Categorical Enrollment

**Energy Savings Assistance Program
And
California Alternate Rates for Energy Program**

SDG&E 2017 Summary Highlights

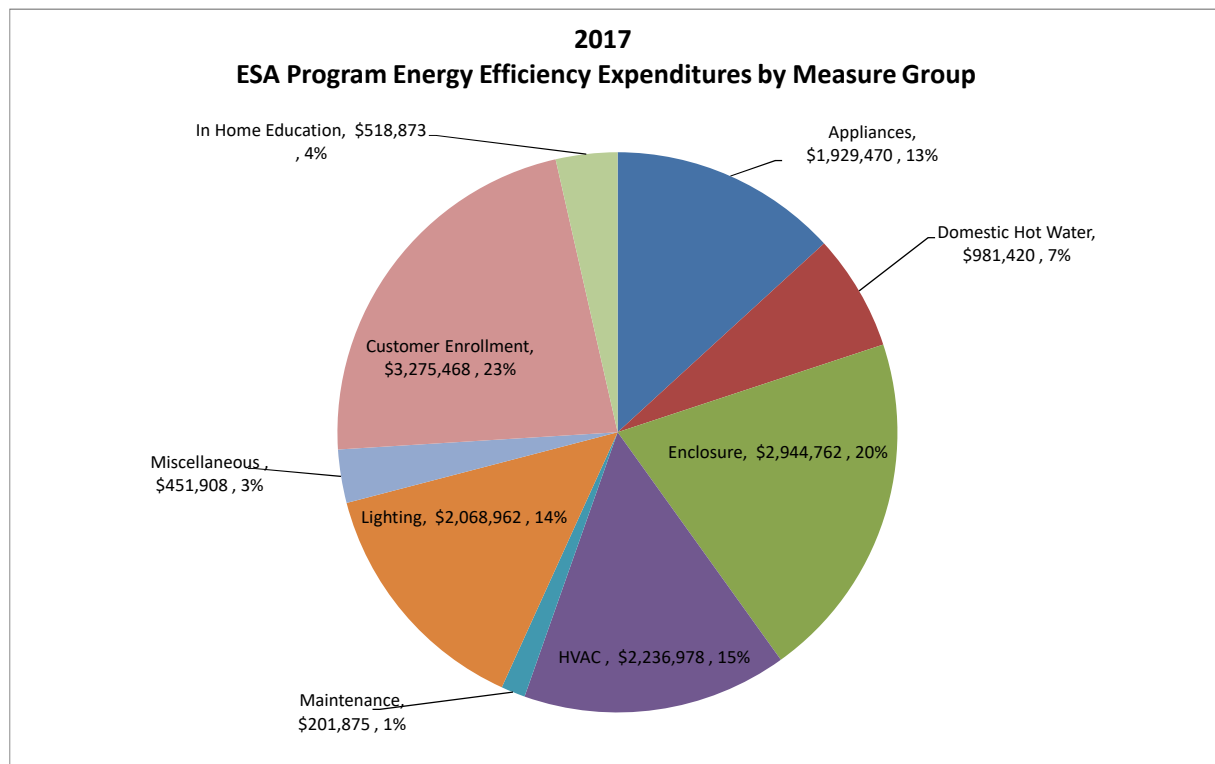
ESA Program			
2017 Energy Savings Assistance Program Summary			
2017	Authorized / Planning Assumptions	Actual	%
Budget	\$30,649,505	\$17,854,128	58%
Funded from 2009-2016 Unspent Funds	\$3,664,186	\$142,586	4%
Summary Homes Treated	20,316	21,677	107%
Summary kWh Saved	7,364,496	3,446,316	47%
Summary kW Demand Reduced	1,398	402	29%
Summary Therms Saved	299,886	208,384	69%
First Touches Homes Treated *	11,563	13,213	114%
- kWh Saved		2,542,162	
- kW Demand Reduced		300	
- Therms Saved		113,924	
Go-Backs/Retreated Homes *	8,753	8,464	97%
- kWh Saved		904,154	
- kW Demand Reduced		102	
- Therms Saved		94,460	

* SDG&E's authorized forecast included number of homes treated for first touches versus go-backs; measures and savings were not included in the forecast.

Note: The authorized budget and values shown for planning assumptions are from SDG&E's Conforming Advice Letter 3065-E-A/2568-G-A and authorized by Commission Resolution E-4884 approved on December 14, 2017.

CARE Program			
2017 CARE Program Summary			
2017	Authorized Budget	Actual	%
Administrative Expenses	\$ 6,911,207	\$ 5,954,234	86%
Subsidies	\$ 69,916,644	\$ 114,029,348	163%
Service Establishment Charge	\$ -	\$ -	n/a
Total Program Costs and Discounts	\$ 76,827,851	\$ 119,983,582	156%
2017 CARE New Enrollments	Automatically Enrolled via Data Sharing, ESA Participation, etc	Self Certified as Categorically Eligible	Self Certified as Income Eligible
Method	2,452	27,537	37,495
2017 CARE Penetration	Estimated Eligible Participants	Participants	Penetration Rate
Total Enrolled	329,763	281,274	85%

Data in pie chart below is linked to Table 1 under the Annual Expenses section and does not include unspent funds from ESA Table 1A.



	A	B	C	D	E	F	G	H	I	J
1	SDG&E PY 2017 Energy Savings Assistance Program Annual Report ESAP Table 1A Expenses Funded from 2009-2016 Unspent Program Funds									
2		2017 Authorized Budget ^{1,2}			2017 Annual Expenses			% of Budget Spent		
3	ESA Program:	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
4	Energy Efficiency									
5				\$ -			\$ -			
6	Multi-Family Common Area Measures	\$ 989,875	\$ 1,010,125	\$ 2,000,000	\$ 47,956	\$ 47,956	\$ 95,913	5%	5%	5%
7	In Home Education	\$ 151,659	\$ 151,659	\$ 303,318	\$ 22,058	\$ 22,058	\$ 44,117	15%	15%	15%
8	Leveraging - CSD	\$ 238,773	\$ 243,658	\$ 482,431			\$ -	0%	0%	0%
9	Measurement and Evaluation Studies	\$ 30,625	\$ 30,625	\$ 61,250			\$ -	0%	0%	0%
10	Regulatory Compliance	\$ 173,438	\$ 173,438	\$ 346,875			\$ -	0%	0%	0%
11	General Administration	\$ 235,156	\$ 235,156	\$ 470,312	\$ 1,279	\$ 1,279	\$ 2,557	1%	1%	1%
12										
13	TOTAL UNSPENT PROGRAM COSTS[1]	\$ 1,819,526	\$ 1,844,660	\$ 3,664,186	\$ 71,293	\$ 71,293	\$ 142,586	4%	4%	4%
14										
15	[1] D.16-11-022 specifically directed funding for new initiatives to come from unspent 2009-2016 ESA Program funds.									
16	[2] Reflects the funding authorized in D.16-11-022 per year and updated in Commission Resolution E-4884 dated December 18, 2017 which addressed SDG&E's Conforming Advice Letter 3065-E/2568-G filed on April 3, 2017.									
17										

	A	B	C	D	E	F	G	H
1	SDG&E 2017 Energy Savings Assistance Program Annual Report							
2	ESAP Table 2A							
3	ESAP Expenses and Energy Savings by Measures Installed							
4								
5								
6			ESA Program - CSD Leveraging					
			Year-To-Date Completed & Expensed Installation					
7	Measures	Units	Quantity Installed	kWh [3] (Annual)	kW [3] (Annual)	Therms [3] (Annual)	Expenses (\$)	% of Expenditure
8	Appliances							
9	High Efficiency Clothes Washer	Each	-	-	-	-	\$ -	0.0%
10	Refrigerators	Each	-	-	-	-	\$ -	0.0%
11	Microwaves [4]	Each	-	-	-	-	\$ -	0.0%
12	Domestic Hot Water							
13	Water Heater Blanket	Home	-	-	-	-	\$ -	0.0%
14	Low Flow Shower Head	Home	-	-	-	-	\$ -	0.0%
15	Water Heater Pipe Insulation	Home	-	-	-	-	\$ -	0.0%
16	Faucet Aerator	Home	-	-	-	-	\$ -	0.0%
17	Water Heater Repair/Replacement	Each	-	-	-	-	\$ -	0.0%
18	Thermostatic Shower Valve	Each	-	-	-	-	\$ -	0.0%
19	New - Combined Showerhead/TSV	Each	-	-	-	-	\$ -	0.0%
20	New - Heat Pump Water Heater	Each	-	-	-	-	\$ -	0.0%
21	New - Tub Diverter/ Tub Spout	Each	-	-	-	-	\$ -	0.0%
22	New - Thermostat-controlled Shower Valve	Each	-	-	-	-	\$ -	0.0%
23	Enclosure							
24	Air Sealing / Envelope [1]	Home	-	-	-	-	\$ -	0.0%
25	Caulking	Home	-	-	-	-	\$ -	0.0%
26	Attic Insulation	Home	-	-	-	-	\$ -	0.0%
27	HVAC							
28	FAU Standing Pilot Conversion	Each	-	-	-	-	\$ -	0.0%
29	Furnace Repair/Replacement	Each	-	-	-	-	\$ -	0.0%
30	Room A/C Replacement	Each	-	-	-	-	\$ -	0.0%
31	Central A/C replacement	Each	-	-	-	-	\$ -	0.0%
32	Heat Pump Replacement	Each	-	-	-	-	\$ -	0.0%
33	Evaporative Cooler (Replacement)	Each	-	-	-	-	\$ -	0.0%
34	Evaporative Cooler (Installation)	Each	-	-	-	-	\$ -	0.0%
35	Duct Testing and Sealing	Home	-	-	-	-	\$ -	0.0%
36	New - Energy Efficient Fan Control	Home	-	-	-	-	\$ -	0.0%
37	New - Prescriptive Duct Sealing	Home	-	-	-	-	\$ -	0.0%
38	New - High Efficiency Forced Air Unit (HE FAU)	Home	-	-	-	-	\$ -	0.0%
39	New - A/C Time Delay	Home	-	-	-	-	\$ -	0.0%
40	Maintenance							
41	Furnace Clean and Tune	Home	-	-	-	-	\$ -	0.0%
42	Central A/C Tune up	Home	-	-	-	-	\$ -	0.0%
43	Lighting							
44	Compact Fluorescent Lights (CFL)	Each	-	-	-	-	\$ -	0.0%
45	Interior Hard wired CFL fixtures	Each	-	-	-	-	\$ -	0.0%
46	Exterior Hard wired CFL fixtures	Each	-	-	-	-	\$ -	0.0%
47	Torchiere	Each	-	-	-	-	\$ -	0.0%
48	Occupancy Sensor	Each	-	-	-	-	\$ -	0.0%
49	LED Night Lights	Each	-	-	-	-	\$ -	0.0%
50	New - LED Diffuse Bulb (60W Replacement)	Each	-	-	-	-	\$ -	0.0%
51	New - LED Reflector Bulb	Each	-	-	-	-	\$ -	0.0%
52	New - LED Reflector Downlight Retrofit Kits	Each	-	-	-	-	\$ -	0.0%
53	New - LED A-Lamps	Each	-	-	-	-	\$ -	0.0%
54	Miscellaneous							
55	Pool Pumps	Each	-	-	-	-	\$ -	0.0%
56	Smart Power Strips - Tier 1	Each	-	-	-	-	\$ -	0.0%
57	New - Smart Power Strips - Tier 2	Each	-	-	-	-	\$ -	0.0%
58	Pilots							
59								
60	Customer Enrollment							
61	Outreach & Assessment	Home					\$ -	0.0%
62	In-Home Education	Home					\$ -	0.0%
63								
64	Total Savings/Expenditures			-	-	-	\$ -	0.0%
65								
66	Total Households Weatherized [2]							
67								
68	CSD MF Buildings Treated		Total					
69								
70	- Multifamily			0				
71								
72								
73	[1] Envelope and Air Sealing Measures may include outlet cover plate gaskets, attic minor home repairs. Minor home repairs predominantly are door							
74	[2] Weatherization may consist of attic insulation, attic access weatherization, weatherstripping - door, caulking, & minor home repairs.							
76	[3] All savings are calculated based on the following sources:							
77	Evergreen Economics "Impact Evaluation of the 2011 CA Low Income Energy Efficiency Program, Final Report." August 30, 2013.							
78	[4] Microwave savings are from ECONorthWest Studies received in December of 2011.							
79								

	A	B	C	D	E	F	G	H
1	SDG&E 2017 Energy Savings Assistance Program Annual Report							
2	ESAP Table 2B							
3	ESAP Expenses and Energy Savings by Measures Installed							
4								
5		ESA Program - Multifamily Common Area [7]						
6			Year-To-Date Completed & Expensed Installation					
7	Measures	Units	Quantity Installed	kWh [3] (Annual)	kW [3] (Annual)	Therms [3] (Annual)	Expenses (\$)	% of Expenditure
8	Appliances							
9	High Efficiency Clothes Washer	Each	-	-	-	-	\$ -	0.0%
10	Refrigerators	Each	-	-	-	-	\$ -	0.0%
11	Microwaves [4]	Each	-	-	-	-	\$ -	0.0%
12								
13								
14	Domestic Hot Water							
15	Water Heater Blanket	Home	-	-	-	-	\$ -	0.0%
16	Low Flow Shower Head	Home	-	-	-	-	\$ -	0.0%
17	Water Heater Pipe Insulation	Home	-	-	-	-	\$ -	0.0%
18	Faucet Aerator	Home	-	-	-	-	\$ -	0.0%
19	Water Heater Repair/Replacement	Each	-	-	-	-	\$ -	0.0%
20	Thermostatic Shower Valve	Each	-	-	-	-	\$ -	0.0%
21	New - Combined Showerhead/TSV	Each	-	-	-	-	\$ -	0.0%
22	New - Heat Pump Water Heater	Each	-	-	-	-	\$ -	0.0%
23	New - Tub Diverter/ Tub Spout	Each	-	-	-	-	\$ -	0.0%
24	New - Thermostat-controlled Shower Valve	Each	-	-	-	-	\$ -	0.0%
25								
26								
27	Enclosure							
28	Air Sealing / Envelope [1]	Home	-	-	-	-	\$ -	0.0%
29	Caulking	Home	-	-	-	-	\$ -	0.0%
30	Attic Insulation	Home	-	-	-	-	\$ -	0.0%
31								
32								
33	HVAC							
34	FAU Standing Pilot Conversion	Each	-	-	-	-	\$ -	0.0%
35	Furnace Repair/Replacement	Each	-	-	-	-	\$ -	0.0%
36	Room A/C Replacement	Each	-	-	-	-	\$ -	0.0%
37	Central A/C replacement	Each	-	-	-	-	\$ -	0.0%
38	Heat Pump Replacement	Each	-	-	-	-	\$ -	0.0%
39	Evaporative Cooler (Replacement)	Each	-	-	-	-	\$ -	0.0%
40	Evaporative Cooler (Installation)	Each	-	-	-	-	\$ -	0.0%
41	Duct Testing and Sealing	Home	-	-	-	-	\$ -	0.0%
42	New - Energy Efficient Fan Control	Home	-	-	-	-	\$ -	0.0%
43	New - Prescriptive Duct Sealing	Home	-	-	-	-	\$ -	0.0%
44	New - High Efficiency Forced Air Unit (HE FAU)	Home	-	-	-	-	\$ -	0.0%
45	New - A/C Time Delay	Home	-	-	-	-	\$ -	0.0%
46								
47								
48	Maintenance							
49	Furnace Clean and Tune	Home	-	-	-	-	\$ -	0.0%
50	Central A/C Tune up	Home	-	-	-	-	\$ -	0.0%
51								
52								
53	Lighting							
54	Compact Fluorescent Lights (CFL)	Each	-	-	-	-	\$ -	0.0%
55	Interior Hard wired CFL fixtures	Each	-	-	-	-	\$ -	0.0%
56	Exterior Hard wired CFL fixtures	Each	-	-	-	-	\$ -	0.0%
57	Torchiere	Each	-	-	-	-	\$ -	0.0%
58	Occupancy Sensor	Each	-	-	-	-	\$ -	0.0%
59	LED Night Lights	Each	-	-	-	-	\$ -	0.0%
60	New - LED Diffuse Bulb (60W Replacement)	Each	-	-	-	-	\$ -	0.0%
61	New - LED Reflector Bulb	Each	-	-	-	-	\$ -	0.0%
62	New - LED Reflector Downlight Retrofit Kits	Each	-	-	-	-	\$ -	0.0%
63	New - LED A-Lamps	Each	-	-	-	-	\$ -	0.0%
64								
65								
66	Miscellaneous							
67	Pool Pumps	Each	-	-	-	-	\$ -	0.0%
68	Smart Power Strips - Tier 1	Each	-	-	-	-	\$ -	0.0%
69	New - Smart Power Strips - Tier 2	Each	-	-	-	-	\$ -	0.0%
70								
71								
72	Ancillary Services							
73	Commissioning [5]	Home	-	-	-	-	\$ -	0.0%
74	Audit	Home	-	-	-	-	\$ -	0.0%
75	Administration [6]	Home	-	-	-	-	\$ -	0.0%
76	Pilots							
77								
78	Customer Enrollment							
79	Outreach & Assessment	Home	-				\$ -	0.0%
80	In-Home Education	Home	0				\$ -	0.0%
81								
82	Total Savings/Expenditures			-	-	-	\$ -	0.0%
83								
84	Total Multifamily Buildings Weatherized [2]							
85								
86	Multifamily Buildings Treated	Total						
87								
88	- Multifamily		0					
89								
90								
91	[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.							
92	[2] Weatherization may consist of attic insulation, attic access weatherization, weatherstripping - door, caulking, & minor home repairs.							
93	[3] All savings are calculated based on the following sources:							
94	[4] Microwave savings are from ECONorthWest Studies received in December of 2011							
95	Evergreen Economics "Impact Evaluation of the 2011 CA Low Income Energy Efficiency Program, Final Report." August 30, 2013							
96	[5] Refers to optimizing the installation of the measure installed such as retrofitting pipes, etc.							
97								
98	[6] 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.							
99	[7] 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.							
100								
101	Note: The applicable MF common area measures will need to be reflected in the appropriate subsections above.							
102								

	A	B	C	D	E
1	SDG&E PY 2017 Energy Savings Assistance Program Annual Report ESAP Table 3 Program Cost Effectiveness				
2					
3					
4	Ratio of Benefits Over Costs			Net Benefits \$	
5	ProgramYear	ESACET	ResourceTRC	ESACET	ResourceTRC
6	2017	0.68	0.54	(5,406,072)	(3,517,425)
7	Notes: - All program measures "resource and non-resource measures" are included in the ESACET. Only measures considered "resource measures" are included in the Resource TRC. - The ESACET includes energy and non-energy benefits and all program costs including measure, installation, and administrative costs. - The Resource TRC includes energy benefits and program measure and installation costs. - Ordering Paragraph 34 of D.14-08-030 adopts the 2013 ESA Impact Evaluation. The results from that study were used in this Annual Report. - Ordering Paragraph 43 of D.14-08-030 directs the application of the two new cost effectiveness tests, ESACET and Resource TRC.				
8					
9					
10					
11					
12					
13					
14					
15					

	A	B	C	D	E	F	G
1	SDG&E PY 2017 Energy Savings Assistance Program Annual Report						
2	ESAP Table 4						
3	Detail by Housing Type and Source[1]						
4			2017 Energy Savings ⁵				
5	Customer	Housing Type	# Homes Treated	(mWh)	MW	(mTherm)	2017 Expenses
6	Gas and Electric Customers						
7	Owners - Total		4,505	1,134	0.141	81	7,172,111
8		Single Family	3,398	913	0.114	73.3	5,574,145
9		Multi Family	372	91	0.011	2.7	309,825
10		Mobile Homes	735	130	0.016	5.3	1,288,141
11	Renters - Total		14,628	1,715	0.199	125	6,428,430
12		Single Family	6,869	864	0.095	93.1	3,625,191
13		Multi Family	7,706	840	0.103	31.5	2,774,701
14		Mobile Homes	53	10	0.001	0.1	28,539
15	Electric Customers (only)						
16	Owners - Total		560	182	0.020	0	365,887
17		Single Family	476	155	0.016	0.0	\$306,610
18		Multi Family	63	19	0.002	0.0	\$47,660
19		Mobile Homes	21	9	0.001	0.0	\$11,616
20	Renters - Total		1,984	416	0.043	2	687,406
21		Single Family	877	215	0.022	1.6	\$351,431
22		Multi Family	1,095	196	0.020	0.7	\$330,546
23		Mobile Homes	12	5	0.001	(0.0)	\$5,429
24	Gas Customers (only)						
25	Owners - Total		-	-	-	-	-
26		Single Family	-	-	-	-	\$ -
27		Multi Family	-	-	-	-	\$ -
28		Mobile Homes	-	-	-	-	\$ -
29	Renters - Total		-	-	-	-	-
30		Single Family	-	-	-	-	\$ -
31		Multi Family	-	-	-	-	\$ -
32		Mobile Homes	-	-	-	-	\$ -
33	Gas and Electric Total						
34	Multifamily Common Area Bldgs - Total						
35							
36	Totals:		21,677	3,447	0.402	208	14,653,834
37							
38							
39	Penetration History						
40	Year	Homes Treated ²	Ineligible & Unwilling ³	Estimated Eligible in Current Year ⁴	Current Year Penetration Rate for Homes Treated		
41	2002	14,089					
42	2003	15,706					
43	2004	14,897					
44	2005	11,254					
45	2006	13,771					
46	2007	13,074					
47	2008	20,804					
48	2009	20,927	6,685	20,384	103%		
49	2010	21,593	8,690	20,384	106%		
50	2011	22,575	8,423	20,384	111%		
51	2012	22,415	7,871	20,316	110%		
52	2013	17,568	13,411	20,316	86%		
53	2014	22,039	15,738	20,316	108%		
54	2015	20,209	17,308	20,316	99%		
55	2016	19,792	22,570	20,316	97%		
56	2017	13,212	30,306	11,563	114%		
57	2018						
58	2019						
59	2020						
60	Total Homes Treated since 2002	283,925	131,002	174,295			
61							
62	[1] Summary data which includes ESA Program, CSD Leveraging, and MF efforts.						
63	[2] Homes treated since 2002 are reported to track progress toward meeting the 2020 Programmatic Initiative. It includes first touches and CSD leveraging authorized in D.16-11-022 and D.17-12-009. It does not include go-backs/retreatments.						
64	[3] Ineligible & Unwilling defined in ESA Table 8.						
65	[4] For years prior to 2017, this value is based on Attachment F of D.12-08-044 and D.14-08-030. For 2017, this is based on the calculation of remaining eligible households as described on pages 5 and 6 of SDG&E's Conforming Advice Letter filed April 3, 2017 and as ordered in Ordering Paragraph 80 of D.17-12-009.						
66	[5] Ordering Paragraph 34 of D.14-08-030 adopts the 2013 ESA Impact Evaluation. The results from that study were used in this Annual Report.						
67							
68							
69							
70							
71	Year	Utility in Shared Service Territory	Eligible Households in Shared Service Territory	Eligible households treated by both utilities in shared service territory			
72	2017	SoCalGas	18,866	184			

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
	SDG&E PY 2017 Energy Savings Assistance Program Annual Report																		
	ESAP Table 6																		
	ESAP Installation Cost of Program Installation Contractors [1]																		
1																			
2		Unit of Measure	CBO/WMDVBE						Non-CBO/WMDVBE						2017 Program Total				
3			Installations		Dwellings		Costs		Installations		Dwellings		Costs		Units Installed	Households	Costs	Cost/ Unit	Cost/ Household
4			Units	%	Units	%	\$	%	Units	%	Units	%	\$	%					
5	Dwellings	Each	253,948	92%	20,235	93%	\$ 9,960,358	68%	21,429	8%	1,442	7%	\$ 4,693,477	32%	275,377	21,677	\$ 14,653,834	\$ 53.21	\$ 676.01
6	Appliances																		
7	High Efficiency Clothes Washer	Each	-	0%	-	0%	\$ -	0%	388	100%	387	100%	\$ 285,926	100%	388	387	\$ 285,926	\$ 737	\$ 739
8	Refrigerators	Each	-	0%	-	0%	\$ -	0%	911	100%	906	100%	\$ 759,373	100%	911	906	\$ 759,373	\$ 834	\$ 838
9	Microwaves	Each	8,607	99%	8,613	98%	\$ 869,539	98%	113	1%	142	2%	\$ 13,419	2%	8,720	8,755	\$ 882,958	\$ 101	\$ 101
10	Domestic Hot Water																		
11	Water Heater Blanket	Home	222	93%	220	93%	\$ 12,072	93%	16	7%	16	7%	\$ 870	7%	238	236	\$ 12,942	\$ 54	\$ 55
12	Low Flow Shower Head	Home	4,465	71%	2,947	71%	\$ 202,501	71%	1,810	29%	1,212	29%	\$ 82,292	29%	6,275	4,159	\$ 284,793	\$ 45	\$ 68
13	Water Heater Pipe Insulation	Home	45	28%	45	28%	\$ 698	20%	118	72%	118	72%	\$ 2,775	80%	163	163	\$ 3,473	\$ 21	\$ 21
14	Faucet Aerator	Home	17,082	97%	11,607	97%	\$ 94,922	97%	489	3%	318	3%	\$ 3,179	3%	17,571	11,925	\$ 98,100	\$ 6	\$ 8
15	Water Heater Repair/Replacement	Each	280	43%	280	43%	\$ 24,459	6%	377	57%	377	57%	\$ 405,124	94%	657	657	\$ 429,582	\$ 654	\$ 654
16	Thermostatic Shower Valve	Each	1,810	74%	1,151	73%	\$ 108,944	74%	635	26%	424	27%	\$ 38,221	26%	2,445	1,575	\$ 147,165	\$ 60	\$ 93
17	New - Combined Showerhead/TSV	Each	5	100%	5	100%	\$ 325	100%	-	0%	-	0%	\$ -	0%	5	5	\$ 325	\$ 65	\$ 65
18	New - Heat Pump Water Heater	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
19	New - Tub Diverter/ Tub Spout	Each	2	100%	2	100%	\$ 170	100%	-	0%	-	0%	\$ -	0%	2	2	\$ 170	\$ 85	\$ 85
20	New - Thermostat-controlled Shower Valve	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
21	Enclosure																		
22	Air Sealing / Envelope	Home	3,619	64%	3,618	64%	\$ 1,636,336	69%	2,074	36%	2,074	36%	\$ 749,883	31%	5,693	5,692	\$ 2,386,219	\$ 419	\$ 419
23	Attic Insulation	Home	367	70%	367	70%	\$ 370,771	66%	156	30%	155	30%	\$ 191,004	34%	523	522	\$ 561,775	\$ 1,074	\$ 1,076
24	HVAC																		
25	FAU Standing Pilot Light Conversion	Each	7	50%	7	50%	\$ 2,205	50%	7	50%	7	50%	\$ 2,205	50%	14	14	\$ 4,410	\$ 315	\$ 315
26	Furnace Repair/Replacement	Each	2,055	67%	2,053	67%	\$ 210,756	11%	1,025	33%	1,025	33%	\$ 1,792,423	89%	3,080	3,078	\$ 2,003,179	\$ 650	\$ 651
27	Room A/C Replacement	Each	175	100%	156	100%	\$ 164,769	100%	-	0%	-	0%	\$ -	0%	175	156	\$ 164,769	\$ 942	\$ 1,056
28	Central A/C Replacement	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
29	Heat Pump Replacement	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
30	Evaporative Coolers (Replacement)	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
31	Evaporative Coolers (Installation)	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
32	Duct Testing and Sealing	Home	258	73%	258	73%	\$ 23,701	37%	94	27%	94	27%	\$ 40,919	63%	352	352	\$ 64,620	\$ 184	\$ 184
33	New - Energy Efficient Fan Control	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
34	New - Prescriptive Duct Sealing	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
35	New - High Efficiency Forced Air Unit (HE FAU)	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
36	New - A/C Time Delay	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
37	Maintenance																		
38	Furnace Clean and Tune	Home	2,435	91%	2,435	91%	\$ 187,000	93%	242	9%	242	9%	\$ 14,612	7%	2,677	2,677	\$ 201,612	\$ 75	\$ 75
39	Central A/C Tune-up	Home	-	0%	-	0%	\$ -	0%	2	100%	2	100%	\$ 263	100%	2	2	\$ 263	\$ 131	\$ 131
40	Evaporative Cooler Maintenance	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
41	Lighting																		
42	Compact Fluorescent Lights (CFLs)	Each	56,850	96%	11,103	98%	\$ 416,727	95%	2,655	4%	240	2%	\$ 22,913	5%	59,505	11,343	\$ 439,640	\$ 7	\$ 39
43	Interior Hard wired CFL fixtures	Each	2,660	93%	1,198	91%	\$ 202,939	93%	203	7%	121	9%	\$ 15,607	7%	2,863	1,319	\$ 218,545	\$ 76	\$ 166
44	Exterior Hard wired CFL fixtures	Each	894	77%	570	76%	\$ 50,605	77%	261	23%	183	24%	\$ 15,008	23%	1,155	753	\$ 65,612	\$ 57	\$ 87
45	Torchiere	Each	5,693	98%	2,958	98%	\$ 555,284	98%	88	2%	68	2%	\$ 8,800	2%	5,781	3,026	\$ 564,084	\$ 98	\$ 186
46	Occupancy Sensor	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
47	LED Night Lights	Each	56,891	96%	20,015	95%	\$ 190,072	96%	2,208	4%	1,100	5%	\$ 7,419	4%	59,099	21,115	\$ 197,491	\$ 3	\$ 9
48	New - LED Diffuse Bulb (60W Replacement)	Each	36,689	91%	8,148	96%	\$ 513,646	91%	3,505	9%	323	4%	\$ 49,070	9%	40,194	8,471	\$ 562,716	\$ 14	\$ 66
49	New - LED Reflector Bulb	Each	1,381	93%	495	95%	\$ 19,334	93%	110	7%	26	5%	\$ 1,540	7%	1,491	521	\$ 20,874	\$ 14	\$ 40
50	New - LED Reflector Downlight Retrofit Kits	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
51	New - LED A-Lamps	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
52	Miscellaneous																		
53	Pool Pumps	Each	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
54	Smart Power Strips	Each	10,932	91%	8,147	93%	\$ 401,867	91%	1,135	9%	610	7%	\$ 41,711	9%	12,067	8,757	\$ 443,578	\$ 37	\$ 51
55	New - Smart Power Strips - Tier 2	Each	124	104%	95	100%	\$ 8,680	104%	(5)	-4%	-	0%	\$ (350)	-4%	119	95	\$ 8,330	\$ 70	\$ 88
56	Ancillary Services																		
57	Commissioning	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
58	Audit	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
59	Administration	Home	-	0%	-	0%	\$ -	0%	-	0%	-	0%	\$ -	0%	-	-	\$ -	\$ -	\$ -
60	Pilots																		
61		Each		0%						0%					-	-	\$ -	\$ -	\$ -
62		Each		0%						0%					-	-	\$ -	\$ -	\$ -
63	Customer Enrollment																		
64	Outreach & Assessment	Home	20,235	93%	20,235	93%	\$ 3,158,543	96%	1,442	7%	1,442	7%	\$ 119,065	4%	21,677	21,677	\$ 3,277,608	\$ 151	\$ 151
65	In-Home Education	Home	20,165	94%	20,165	94%	\$ 533,494	95%	1,370	6%	1,370	6%	\$ 30,208	5%	21,535	21,535	\$ 563,702	\$ 26	\$ 26
66																			
67	[1] Summary data which includes ESA Program, CSD Leveraging, and MF Common Area efforts.																		
68																			
69	Note: The applicable MF common area measures will need to be reflected in the appropriate subsections above.																		
70																			
71																			

	A	B	C	D	E
1	SDG&E PY 2017 Energy Savings Assistance Program Annual Report ESAP Table 7 Expenditures Recorded by Cost Element [1]				
2	ESA Program:	Labor	Non-Labor	Contractor	Total [3]
3	Energy Efficiency				
4	Appliances	\$ -	\$ (18,257)	\$ 1,947,727	\$ 1,929,470
5	Domestic Hot Water	\$ -	\$ (3,428)	\$ 984,848	\$ 981,420
6	Enclosure	\$ -	\$ (18,899)	\$ 2,963,661	\$ 2,944,762
7	HVAC	\$ -	\$ (10,667)	\$ 2,247,645	\$ 2,236,978
8	Maintenance	\$ -	\$ -	\$ 201,875	\$ 201,875
9	Lighting	\$ -	\$ (12,662)	\$ 2,081,625	\$ 2,068,962
10	Miscellaneous	\$ -	\$ -	\$ 451,908	\$ 451,908
11	Customer Enrollment	\$ -	\$ (390)	\$ 3,275,858	\$ 3,275,468
12	In Home Education [2]	\$ -	\$ (70)	\$ 563,060	\$ 562,990
13	Pilot	\$ -	\$ -	\$ -	\$ -
14	Multi-Family Common Area Measures	\$ 4,181	\$ 91,732	\$ -	\$ 95,913
15	Energy Efficiency TOTAL	\$ 4,181	\$ 27,358	\$ 14,718,207	\$ 14,749,747
16					
17	Training Center	\$ -	\$ -	\$ -	\$ -
18	Inspections	\$ 136,328	\$ 517	\$ -	\$ 136,845
19	Marketing and Outreach	\$ 24,608	\$ 832,700	\$ -	\$ 857,307
20	Statewide Marketing Education and Outreach	\$ (1,101)	\$ (4,564)	\$ -	\$ (5,665)
21	Measurement and Evaluation Studies	\$ 11,842	\$ 81,534	\$ -	\$ 93,375
22	Regulatory Compliance	\$ 119,419	\$ 87,324	\$ -	\$ 206,743
23	General Administration	\$ 1,038,768	\$ 897,103	\$ -	\$ 1,935,871
24	CPUC Energy Division	\$ -	\$ 22,491	\$ -	\$ 22,491
25					
26	TOTAL PROGRAM COSTS	\$ 1,334,044	\$ 1,944,463	\$ 14,718,207	\$ 17,996,714
27					
28					
29	[1] Summary data which includes ESA Program, CSD Leveraging, and MF Common Area efforts.				
30	[2] In Home Education includes \$44,117 that is reflected in ESA Table 1A.				
31	[3] Includes expense related to unspent funds which were authorized in Commission Resolution E-4884 dated December 18, 2017 which addressed SDG&E's Conforming Advice Letter 3065-E/2568-G filed on April 3, 2017.				

	A	B	C	D	E	F	G	H
1	SDG&E PY 2017 Energy Savings Assistance Program Annual Report ESAP Table 8 ESAP Homes Unwilling / Unable to Participate							
2	Reason Provided							
3	County	Customer Unwilling/Declined Program Measures	Customer Unavailable - Scheduling Conflicts	Hazardous Environment (unsafe/unclean)	Landlord Refused to Authorize Participation	Household Income Exceeds Allowable Limits	Unable to Provide Required Documentation	Other Infeasible/ Ineligible
4	SAN DIEGO	15,836	326	-	-	11,330	932	290
5	ORANGE	975	9	-	-	566	25	17
6								
7								
8								
9								
10								
11								
12								
13								
14								
15								
16								
17								
18	Total	16,811	335	-	-	11,896	957	307
19								
20								
21	[1] Summary data which includes ESA Program, CSD Leveraging, and MF Common Area efforts.							
22								
23	ESAP Coordinated Treatment (SCE and SCG only)							
24		Reason Why Household did not Receive Additional Measures from one Utility or Partnering Agency [1]						
25	# of Households Received Measures from one Utility, but not other Utility or Partnering Agency	# of Customer Unwilling/Declined Program Measures	# of Customer Unavailable - Scheduling Conflicts	# of Hazardous Environment (unsafe/unclean)	# of Landlord Refused to Authorize Participation	# of Other Infeasible/ Ineligible		
26								
27								
28	Total	-	-	-	-	-		
29								
30								
31	[1] Summary data which includes ESA Program, CSD Leveraging, and MF Common Area efforts.							

	A	B	C	D	E	F	G
1	SDG&E PY 2017 Energy Savings Assistance Program Annual Report ESAP Table 9 Life Cycle Bill Savings by Measure [1][3]						
2	Measure Description		2017 Number Installed	Per Measure Electric Impact (kWh)	Per Measure Gas Impact (Therms)	Effective Useful Life (EUL)	2017 Total Measure Life Cycle Bill Savings
3	Appliances						
4	High Efficiency Clothes Washer	Each	388	123.0	15.9	11	\$ 34,197
5	Refrigerators	Each	911	617.1		14	\$ 958,937
6	Microwaves [2]	Each	8,720	66.5	23.6	10	\$ 933,515
7	Domestic Hot Water						
8	Water Heater Blanket	Home	238	3.9	0.5	5	\$ 339
9	Low Flow Shower Head	Home	6275	3.8	0.6	10	\$ 20,276
10	Water Heater Pipe Insulation	Home	163	0.4	0.0	11	\$ 28
11	Faucet Aerator	Home	17571	2.2	0.3	10	\$ 27,611
12	Water Heater Repair/Replacement	Each	657		6.8	11	\$ 23,610
13	Thermostatic Shower Valve	Each	2445	62.8	2.4	10	\$ 35,831
14	New - Combined Showerhead/TSV	Each	5		9.6	10	\$ 237
15	New - Heat Pump Water Heater	Each	0				
16	New - Tub Diverter/ Tub Spout	Each	2		2.0	10	\$ 20
17	New - Thermostat-controlled Shower Valve	Each	0				
18	Enclosure						
19	Air Sealing / Envelope	Home	5,692	49.3	3.3	11	485,482
20	Attic Insulation	Home	522	97.0	26.6	20	
21	HVAC						
22	FAU Standing Pilot Light Conversion	Each	14		15.1	13	\$ 1,267
23	Furnace Repair/Replacement	Each	3,080		-	20	\$ -
24	Room A/C Replacement	Each	175	25.3		9	\$ 5,425
25	Central A/C Replacement	Each	-				
26	Heat Pump Replacement	Each	-				
27	Evaporative Coolers (Replacement)	Each	-				
28	Evaporative Coolers (Installation)	Each	-				
29	Duct Testing and Sealing	Home	352	55.7	14.4	18	\$ 77,269
30	New - Energy Efficient Fan Control	Home	-				
31	New - Prescriptive Duct Sealing	Home	-				
32	New - High Efficiency Forced Air Unit (HE FAU)	Home	-				
33	New - A/C Time Delay	Home	-				
34	Maintenance						
35	Furnace Clean and Tune	Home	2,677		9.7	5	\$ 71,530
36	Central A/C Tune-up	Home	2	255.5		10	\$ 680
37	Evaporative Cooler Maintenance	Home	-				
38	Lighting						
39	Compact Fluorescent Lights (CFLs)	Each	59,505	17.4	-	7	\$ 906,384
40	Interior Hard wired CFL fixtures	Each	2,863	42.0		16	\$ 224,511
41	Exterior Hard wired CFL fixtures	Each	1,155	42.0		20	\$ 104,149
42	Torchiere	Each	5,781	22.3		16	\$ 241,092
43	Occupancy Sensor	Each	-				
44	LED Night Lights	Each	59,099		1.1	16	\$ 123,732
45	New - LED Diffuse Bulb (60W Replacement)	Each	40,194	14.3	(0.3)	16	\$ 1,002,279
46	New - LED Reflector Bulb	Each	1,491	26.9	(0.5)	16	\$ 70,199
47	New - LED Reflector Downlight Retrofit Kits	Each	-	-	-		
48	New - LED A-Lamps	Each	-	-	-		
49	Miscellaneous						
50	Pool Pumps	Each	-				
51	Smart Power Strips	Each	12,067	24.5		8	\$ 329,265
52	New - Smart Power Strips - Tier 2	Each	119	24.5		8	\$ 3,247
53	Ancillary Services						
54	Commissioning	Home					\$ -
55	Audit	Home					\$ -
56	Administration	Home					\$ -
57	Pilots						
58							\$ -
59							
60	Total						\$ 5,891,654
61							
62	Total Homes Served By the Program	21,677					
63	Life Cycle Bill Savings Per Home	\$ 272					
64							
65							
66	[1] Summary data which includes ESA Program, CSD Leveraging, and MF common area efforts.						
67	[2] For microwaves, the savings estimate comes from a separate analysis completed by Evergreen Economics. A reasonable estimate for the usage of the microwave, which would be shown as negative kWh, is not available at this time; however, we expect this to be addressed in the next impact evaluation.						
68	[3] Ordering Paragraph 34 of D.14-08-030 adopts the 2013 ESA Impact Evaluation. The results from that study were used in this Annual Report.						
69							
70	Note: The applicable MF common area measures will need to be reflected in the appropriate subsections above.						

	A	B	C
1	SDG&E PY 2017 Energy Savings Assistance Program Annual Report ESAP Table 10 Energy Rate Used for Bill Savings Calculations [1]		
2	Year	\$/kWh	\$/Therm
3			
4	2017	0.16	0.61
5	2018	0.17	0.63
6	2019	0.17	0.64
7	2020	0.18	0.66
8	2021	0.18	0.68
9	2022	0.19	0.70
10	2023	0.20	0.73
11	2024	0.20	0.75
12	2025	0.21	0.77
13	2026	0.21	0.79
14	2027	0.22	0.82
15	2028	0.23	0.84
16	2029	0.23	0.87
17	2030	0.24	0.89
18	2031	0.25	0.92
19	2032	0.26	0.95
20	2033	0.26	0.98
21	2034	0.27	1.00
22	2035	0.28	1.03
23	2036	0.29	1.07
24	2037	0.30	1.10
25	2038	0.31	1.13
26	2039	0.31	1.16
27	2040	0.32	1.20
28	2041	0.33	1.24
29	[1] For 2017, the average cost per kWh and therm paid by ESA participants is shown. Cost is escalated 3% annually for remaining years. These values do not include adjustments for TOU rates.		
30			
31			
32			

	A	B	C	D	E
1	<p align="center">SDG&E PY 2017 Energy Savings Assistance Program Annual Report ESAP Table 11 Bill Savings Calculations by Program Year [1]</p>				
2	Program Year	Program Costs	Program Lifecycle Bill Savings	Program Bill Savings/ Cost Ratio	Per Home Average Lifecycle Bill Savings
3	2011	\$ 20,950,509	\$ 11,372,235	0.54	\$ 504
4	2012	\$ 21,046,806	\$ 10,325,509	0.49	\$ 461
5	2013	\$ 17,874,649	\$ 7,897,313	0.44	\$ 450
6	2014	\$ 19,143,282	\$ 9,030,922	0.47	\$ 410
7	2015	\$ 17,355,596	\$ 5,632,584	0.32	\$ 279
8	2016	\$ 17,511,142	\$ 5,435,882	0.31	\$ 275
9	2017	\$ 30,649,505	\$ 5,891,654	0.19	\$ 271.79
10	<p>[1] Summary data which includes ESA Program, CSD Leveraging, and MF Common Area efforts.</p>				
11					
12					
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14					

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Total Unspent Funds Carry forward into 2017	\$ 18,643,907	\$ 15,831,403	\$ 34,475,310
Total Shifted during 2017	\$ (37,814)	\$ (37,814)	\$ (75,629)
2016 M&E (LINA) Studies	\$ (7,937)	\$ (7,938)	\$ (15,875)
Remaining Carryforward from 2016 after fund shift for 2017	\$ 18,598,156	\$ 15,785,651	\$ 34,383,807
Totals not available for fund shift w/out prior written authorization ³	\$ 357,563	\$ 357,563	\$ 715,125
2017 Unspent Funds	\$ 5,691,171	\$ 6,389,081	\$ 12,080,252
Total Unspent Funds Carry forward into 2018 ⁷	\$ 24,646,890	\$ 22,532,294	\$ 47,179,184

	A	B
1	SDG&E PY 2017 Energy Savings Assistance Program Annual Report ESAP Table 13 Categorical and Other Enrollment [1]	
2		
3		
4		
5		
6	Type of Enrollment	Number of Homes Treated
7	Women, Infants, and Children Program (WIC)	1,063
8	Supplemental Security Income (SSI)	873
9	CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	1,016
10	CalWORKs/Temporary Assistance for Needy Families (TANF)	58
11	Tribal TANF	-
12	Medicaid/Medi-Cal for Families	1,718
13	Healthy Families A&B	242
14	National School Lunch Program (NSLP) - Free Lunch	343
15	Low-income Home Energy Assistance Program (LIHEAP)	143
16	Bureau of Indian Affairs General Assistance	1
17	Head Start Income Eligible - (Tribal Only)	1
18	Targeted Self Certification	12,234
19	Standard Enrollment	3,985
20	Total	21,677
21	[1] Summary data which includes ESA Program and CSD Leveraging efforts. Note: Does not include MF common area efforts.	
22		
23		
24		
25		

SDG&E PY 2017 Energy Savings Assistance Program Annual Report
ESAP Table 14
Leveraging & Integration [6]

Partner	Brief Description of Effort	Relationship outside the IOU?	MOU Present?	Amount of Dollars Saved [2]	Amount of Energy Savings [3]	Other Measureable Benefits [3]	Enrollments Resulting from Leveraging Effort [4]	Methodology [5]	Meets all Criteria	If not, Explain
LIHEAP	SDG&E's partners with local CSD agencies to enroll eligible LIHEAP bill assistance customers in the ESA Program. ESA expanded efforts which allowed LIHEAP agencies to perform outreach and assessment services.	Yes	Contract	None	62,871 kWh 7.1 kW 5,363 therms		871	Sum of savings per treated homes identified as having LIHEAP as lead source.	N/A	
CSD	Data sharing effort providing CSD with customer usage information for CSD client receiving weatherization service and payment assistance	Yes	Yes	None			N/A			
SASH	Continued to work closely with Grid Alternatives to efficiently identify and serve any ESA Program eligible customers with all feasible measures. Provide GRID with information for CARE High Usage customers receiving weatherization services through ESA.	Yes	Yes	None	0 kWh 0 kW 0 therms		0			
CARE	CARE/ESA Program combined message in all marketing material	No	No	None	686,794 kWh 72.9 kW 41,853 therms		4,286	Average savings per home x Enrollments		
EUC MIDI Program	Lead Sharing between ESA Program and MIDI	No	No	None	0 kWh 0 kW 0 therms		0			
CARE/Medical Baseline	Marketing to customers enrolled in CARE and/or Medical Baseline	No	No	None	82,632 kWh 9.2 kW 3,121 therms		683	Sum of savings per treated homes identified as having CARE or Medical Baseline as lead source.		
CARE High Usage	Automated Lead Generation for CARE High Usage Verification Process	No	No	None	101,805 kWh 10.9 kW 2,964 therms		431	Sum of savings per treated homes identified as having CARE High Usage as lead source.		

[1] Leveraging, Interdepartmental integration, Program Coordination, Data Sharing, ME&O, etc.

[2] Leveraging and Integration efforts are measurable and quantifiable in terms of dollars saved by the IOU (Shared/contributed/donated resources, shared marketing materials, shared information technology, shared programmatic infrastructure, among others are just some examples of cost and/or resource savings to the IOU).

[3] Annual Energy savings/benefits for measures installation in 2017. Leveraging efforts are measurable and quantifiable in terms of home energy benefits/ savings to the eligible households.

[4] Enrollment increases. Leveraging efforts are measurable and quantifiable in terms of program enrollment increases and/or customers served.

[5] In footnotes, provide information on methodology used to calculate cost and/or resource savings.

[6] Summary data which includes ESA Program, CSD Leveraging, and MF common area

Fields not applicable to specific efforts are marked "N/A"

	A	B	C	D	E	F
1	SDG&E PY 2017 Energy Savings Assistance Program Annual Report					
2	ESAP Table 15					
3	CFL Lighting [4]					
4						
5	ESA Program CFL Tracking Table					
6	Instructions: Please identify the CFL bulbs used within your ESA program and fill in the remaining columns for each					
7	Bulb Name / Identification	Bulb Description (wattage, lumens)	Bulb Cost (material)	Admin Cost (overhead, contractor fee, marketing, etc.)	Total Bulb Cost (material + admin) [1]	AB 1109 Compliant? [2]
8	CFL	14 Watt CFL			7.31	Yes
9	CFL	19 Watt CFL			8.52	Yes
10	CFL	23 Watt CFL			7.55	Yes
11						
12						
13						
14						
15						
16						
17	Year	Number of Homes Treated in ESA Program	Number of Homes Provided CFLs	Avg. # of CFL bulbs given per home	Est. total energy savings from installed CFLs [3]	
18	2009	20,927	17,653	6	1,796,496	
19	2010	21,593	17,016	7	1,796,176	
20	2011	22,575	17,246	6	1,697,568	
21	2012	22,415	17,046	6	1,772,269	
22	2013	17,568	11,639	6	1,502,883	
23	2014	22,039	20,895	6	2,207,495	
24	2015	20,209	18,724	6	1,856,926	
25	2016	19,792	18,606	5	1,626,672	
26	2017	21,677	11,343	5	1,036,278	
27						
28	[1] Bulb cost and admin cost were combined effective 2013.					
29						
30	[2] Compliant in regards to: 1) Do bulbs meet or exceed CEC energy efficiency standards for general purpose lighting?					
31	Do all models comply with Europe's RoHS standards on toxicity?					
32						
33	[3] Ordering Paragraph 34 of D.14-08-030 adopts the 2013 ESA Impact Evaluation. The results from that study were used in this Annual Report.					
34						
35	[4] Summary data which includes ESA Program, CSD Leveraging, and MF efforts.					

	A	B	C	D	E	F	G
1	SDG&E PY 2017 Energy Savings Assistance Program Annual Report ESAP Table 16 "Add Back" Measures						
2							
3							
4							
5							
6			Ratio of Benefits Over Costs				
7	Measure [1][2]	Climate Zone	ESACET	Resouce TRC	Quantity Installed	Budget Impact of "Add Back"	Lifecycle Bill Savings Impact
8	Attic Insulation, Gas, MF, 10	10	1.88	0.76	4	2,346	1,291
9	Attic Insulation, Gas, MF, 7	7	1.82	0.74	3	2,080	1,092
10	Duct Testing and Sealing, Gas, MF, 10	10	0.44	0.43	1	586	162
11	Duct Testing and Sealing, Gas, MH, 10	10	0.44	0.43	10	5,857	1,620
12	Duct Testing and Sealing, Gas, SF, 7	7	0.49	0.52	6	3,514	1,191
13	Duct Testing and Sealing, Gas, SF, 10	10	0.79	1.72	194	27,949	31,279
14	Duct Testing and Sealing, Gas, SF, 7	7	0.80	1.95	141	22,170	28,000
15	Furnace Repair/Replacement, Gas, MF, 10	10	0.00	n/a	63	25,325	-
16	Furnace Repair/Replacement, Gas, MF, 7	7	0.00	n/a	86	18,036	-
17	Furnace Repair/Replacement, Gas, MH, 10	10	0.00	n/a	370	302,451	-
18	Furnace Repair/Replacement, Gas, MH, 15	15	0.00	n/a	1	3,327	-
19	Furnace Repair/Replacement, Gas, MH, 7	7	0.00	n/a	233	181,571	-
20	Furnace Repair/Replacement, Gas, SF, 10	10	0.00	n/a	1,159	619,386	-
21	Furnace Repair/Replacement, Gas, SF, 7	7	0.00	n/a	1,166	712,190	-
22	Room A/C Replacement, Electric, MF, 10	10	0.04	n/a	45	45,700	798
23	Room A/C Replacement, Electric, MH, 10	10	0.05	n/a	24	18,728	425
24	Room A/C Replacement, Electric, SF, 10	10	0.05	n/a	106	88,751	1,950
25	Water Heater Repair/Replacement, Gas, MF, 10	10	0.09	n/a	8	6,518	299
26	Water Heater Repair/Replacement, Gas, MF, 7	7	0.08	n/a	11	10,894	411
27	Water Heater Repair/Replacement, Gas, MH, 10	10	0.07	n/a	116	122,563	4,334
28	Water Heater Repair/Replacement, Gas, MH, 7	7	0.07	n/a	69	77,022	2,578
29	Water Heater Repair/Replacement, Gas, SF, 10	10	0.18	n/a	223	89,415	8,332
30	Water Heater Repair/Replacement, Gas, SF, 7	7	0.17	n/a	228	92,951	8,519
31							
32	Notes:						
33	[1] Based on Appendix J.1 and J.2 in D.12-08-044 and D.14-08-030.						
34	[2] Summary data which includes ESA Program, CSD Leveraging, and MF Common Area efforts.						

	A	B	C	D	E	F	G	H	I	J
1	SDG&E PY 2017 Energy Savings Assistance Program Annual Report ESAP Table 17 Expenditures for Pilots and Studies									
2										
3										
4		Authorized 2017 Funding[1]			2017 Expenses			% of Budget Expended		
5		Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
6	Pilots									
7										
8	Programmable Controllable Thermostat	\$100,000	\$100,000	\$ 200,000	\$ -	\$ -	\$ -	0%	0%	0%
9										
10	Total Pilots	\$100,000	\$100,000	\$200,000	\$0	\$0	\$0	0%	0%	0%
11										
12										
13	Studies									
14										
15	Rapid Feedback Research and Analysis	\$ 3,750	\$ 3,750	\$ 7,500			\$ -	0%	0%	0%
16	Low Income Needs Assessment Study[2]	\$ 9,375	\$ 9,375	\$ 18,750	\$ 24,778	\$ 24,778	\$49,556	264%	264%	264%
17	Load Impact Evaluation Study [3]	\$ 10,313	\$ 10,313	\$ 20,625	\$ 21,909	\$ 21,910	\$43,819	212%	212%	212%
18	2017 Potential and Goals Study	\$ 9,375	\$ 9,375	\$ 18,750			\$ -	0%	0%	0%
19	Equity Criteria and Non Energy Benefits Evaluation (NEB's)	\$ 2,813	\$ 2,813	\$ 5,625			\$ -			
20	Unallocated Funds[4]	\$ 6,563	\$ 6,563	\$ 13,125			\$ -			
21										
22	Total Studies	\$42,188	\$42,188	\$84,375	\$46,687	\$46,688	\$93,375	111%	111%	111%
23										
24	[1] Budget authorized in D.16-11-022.									
25	[2] Year end total of \$49,556 is related to the Low Income Needs Assessment (LINA) Study completed in 2016, billed in 2017. The study was authorized in D.14-08-030 for program year 2016 in which case funds were reserved to pay for this study on completion.									
26	[3] Total authorized study budget is 550,000 and SDG&E's portion is \$82,500 for the 2017-2020 cycle. SDG&E will not exceed the budget authorized for the cycle. The study expenditures have been accelerated from SDG&E's 2017 forecast based on invoices received from SCG.									
27	[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.									
28										
29										

	A	B	C	D	E
1	SDG&E PY 2017 Energy Savings Assistance Program Annual Report ESAP Table 18 Miscellaneous (2nd Refrigerators, Education Only, A/C Cycling, etc.)				
2					
3					
4					
5	Measures	Units	Received Refrigerator	Not eligible for Refrigerator due to Less than Six Occupants	
6					
7	Second Refrigerators	Each	25	9	
8					
9					
10	Measures	Units	Households that Only Received Education		
11					
12					
13	In-Home Education	Home	45		
14					
15					
16	Households for My Energy/My Account Platform				
17	Opt-Out	Already Enrolled	Opt-In		
18	N/A	N/A	N/A		
19					
20					
21					
22	Households Received A/C Cycling Controls when A/C Installed				
23		# Installed			
24	A/C Cycling controls		0		
25					
26					
27	N/A = Data not available				

Households that Received ESA Program Measures and Elect to:
Opt-In to a New Program (DR or alternative tariff)
N/A

Households that Received ESA Program Measures and Elect to:

Opt-In to a New Program (DR or alternative tariff)

N/A

	A	B	C	D	E	F	G	H
1	SDG&E PY 2017 CARE Annual Report							
2	CARE Table 1							
3	Overall Program Expenses							
4	Category	Overall Expenditures		Total	Authorized Budget ¹	% of Budget Spent	Total Shifted ³	Shifted to/from?
5		Electric	Gas					
6	Outreach	\$ 2,412,943	\$ 268,105	\$ 2,681,048	\$ 3,062,862	88%		
7	Processing, Certification, Recertification	\$ 525,622	\$ 58,402	\$ 584,024	\$ 485,894	120%	\$98,130	Shifted from General Administration
8	Post Enrollment Verification	\$ 247,356	\$ 27,484	\$ 274,841	\$ 341,647	80%		
9	IT Programming	\$ 1,404,292	\$ 156,032	\$ 1,560,324	\$ 1,636,567	95%		
10	Cool Centers	\$ 28,333	\$ 3,148	\$ 31,482	\$ 41,275	76%		
11	Pilots	\$ 221,996	\$ 24,666	\$ 246,663	\$ 260,340	95%		
12	Measurement & Evaluation	\$ -	\$ -	\$ -	\$ -	0%		
13	Regulatory Compliance ²	\$ 227,446	\$ 25,272	\$ 252,718	\$ 236,885	107%	\$15,833	Shifted from General Administration
14	General Administration	\$ 245,825	\$ 27,314	\$ 273,139	\$ 789,026	35%	(\$113,963)	Shifted to Processing, Certification, Recertification and Regulatory Compliance
15	CPUC Energy Division	\$ 44,996	\$ 5,000	\$ 49,996	\$ 56,712	88%		
16								
17	TOTAL Program Costs	\$ 5,358,810	\$ 595,423	\$ 5,954,234	\$ 6,911,207	86%	\$0	
18								
19	CARE Rate Discount	\$ 103,112,723	\$ 10,916,625	\$ 114,029,348	\$ 69,916,644	163%	\$ -	
20	Service Establishment Charge Discount	\$ -	\$ -	\$ -	\$ -	0%	\$ -	
21								
22	TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	\$ 108,471,533	\$ 11,512,048	\$ 119,983,582	\$ 76,827,851	156%	\$0	
23								
24	1. Budget authorized in D.16-11-022.							
25	2. Under Regulatory Compliance, it includes manual adjustment of \$30,608.66 (90% Elec; 10% Gas) for 2017 Low Income Program fees that were posted in January 2018.							
26	3. Total Shifted nets to \$0.							
27								

	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	SDG&E PY 2017 CARE Annual Report																								
2	CARE Table 2																								
3	Enrollment, Recertification, Attrition, & Penetration																								
4		New Enrollment									Recertification				Attrition (Drop Offs)					Enrollment		Total CARE Participants	Estimated CARE Eligible	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 Response ⁴	Failed PEV	Failed Recertification	Other	Total Attrition (P+Q+R+S)	Gross (K+O)				Net Adjusted (K-T)
6		Inter-Utility ¹	Intra-Utility ²	Leveraging ³	Combined (B+C+D)	Online	Paper	Phone	Capitation	Combined (F+G+H+I)															
7	January	0	207	0	207	4,138	867	245	370	5,620	5,827	3,069	2,988	4,377	10,434	1,221	32	78	5,927	7,258	16,261	-1,431	267,793	329,763	81%
8	February	0	191	0	191	4,376	856	289	366	5,887	6,078	2,151	2,387	3,499	8,037	835	67	89	3,876	4,867	14,115	1,211	269,004	329,763	82%
9	March	0	172	0	172	3,985	1,023	272	436	5,716	5,888	1,785	2,314	4,866	8,965	937	23	51	2,154	3,165	14,853	2,723	271,727	329,763	82%
10	April	1	264	0	265	2,771	730	160	239	3,900	4,165	1,391	1,746	3,481	6,618	775	20	41	4,076	4,912	10,783	-747	270,980	329,763	82%
11	May	0	275	0	275	3,217	1,051	201	395	4,864	5,139	2,633	2,688	4,202	9,523	788	25	54	4,071	4,938	14,662	201	271,181	329,763	82%
12	June	1	254	0	255	3,719	1,032	202	326	5,279	5,534	2,568	2,741	4,254	9,563	695	34	61	3,154	3,944	15,097	1,590	272,771	329,763	83%
13	July	0	149	0	149	4,422	1,178	169	289	6,058	6,207	1,987	2,505	3,661	8,153	646	19	67	3,758	4,490	14,360	1,717	274,488	329,763	83%
14	August	1	215	0	216	5,320	1,811	202	306	7,639	7,855	2,544	2,880	4,691	10,115	847	57	82	3,214	4,200	17,970	3,655	278,143	329,763	84%
15	September	0	124	0	124	4,280	982	162	222	5,646	5,770	1,923	2,086	3,657	7,666	1,204	62	63	2,138	3,467	13,436	2,303	280,446	329,763	85%
16	October	0	128	0	128	3,643	721	140	174	4,678	4,806	1,439	2,312	4,252	8,003	698	47	78	3,816	4,639	12,809	167	280,613	329,763	85%
17	November	0	134	0	134	3,932	856	94	177	5,059	5,193	2,303	2,696	4,240	9,239	1,137	71	43	3,481	4,732	14,432	461	281,074	329,763	85%
18	December	0	336	0	336	3,313	879	201	293	4,686	5,022	2,596	3,213	4,299	10,108	1,482	68	88	3,184	4,822	15,130	200	281,274	329,763	85%
19	YTD Total	3	2,449	0	2,452	47,116	11,986	2,337	3,593	65,032	67,484	26,389	30,556	49,479	106,424	11,265	525	795	42,849	55,434	173,908	12,050	281,274	329,763	85%
20																									
21																									
22	¹ Enrollments via data sharing between the IOUs.																								
23	² Enrollments via data sharing between departments and/or programs within the utility.																								
24	³ Enrollments via data sharing with programs outside the IOU that serve low-income customers.																								
25	⁴ No response includes no response to both Recertification and Verification.																								

	A	B	C	D	E	F	G	H	I
1	SDG&E PY 2017 CARE Annual Report								
2	CARE Table 3A - Post-Enrollment Verification Results (Model) 2017								
3	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
4	January	267,793	1,559	0.58%	579	18	597	38%	0.22%
5	February	269,004	0	0.00%	0	0	0	0%	0.00%
6	March	271,727	0	0.00%	0	0	0	0%	0.00%
7	April	270,980	414	0.15%	157	19	176	43%	0.06%
8	May	271,181	1,586	0.58%	677	41	718	45%	0.26%
9	June	272,771	1,171	0.43%	493	45	538	46%	0.20%
10	July	274,488	2,042	0.74%	797	71	868	43%	0.32%
11	August	278,143	1,689	0.61%	646	98	744	44%	0.27%
12	September	280,446	2,151	0.77%	836	188	1,024	48%	0.37%
13	October	280,613	2,349	0.84%	1,119	168	1,287	55%	0.46%
14	November	281,074	2,244	0.80%	654	152	806	36%	0.29%
15	December	281,274	1,097	0.39%	0	45	45	4%	0.02%
16	YTD Total	281,274	16,302	5.80%	5,958	845	6,803	42%	2.42%
17									
18	¹ Includes all customers who failed SDG&E's CARE eligibility probability model.								
19	² Includes customers verified as over income or who requested to be de-enrolled.								
20	³ Verification results are tied to the month initiated and the verification process allows customers 90 days to respond to the verification request. Results may be pending due to the time permitted for a participant to respond.								
21	⁴ Percentage of customers dropped compared to the total participants requested to provide verification in that month.								
22	⁵ In February and March of 2017, SDG&E did not conduct Post Enrollment Verification but it was resumed again in April.								
23									
24									
25									
26	SDG&E PY 2017 CARE Annual Report								
27	CARE Table 3B Post-Enrollment Verification Results (Electric only High Usage)								
28									
29	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 HUV Post Enrollment Verification	% of Total CARE Households De-enrolled
30	January	267,793	649	0.24%	427	25	452	70%	0.17%
31	February	269,004	887	0.33%	640	39	679	77%	0.25%
32	March	271,727	435	0.16%	298	11	309	71%	0.11%
33	April	270,980	138	0.05%	85	9	94	68%	0.03%
34	May	271,181	134	0.05%	64	4	68	51%	0.03%
35	June	272,771	193	0.07%	102	8	110	57%	0.04%
36	July	274,488	322	0.12%	198	8	206	64%	0.08%
37	August	278,143	2,307	0.83%	1,685	90	1,775	77%	0.64%
38	September	280,446	1,417	0.51%	1,021	67	1,088	77%	0.39%
39	October	280,613	876	0.31%	625	37	662	76%	0.24%
40	November	281,074	373	0.13%	218	13	231	62%	0.08%
41	December	281,274	210	0.07%	96	10	106	50%	0.04%
42	YTD Total	281,274	7,941	2.82%	5,459	321	5,780	73%	2.05%
43									
44	¹ Includes all participants who were selected for high usage verification process.								
45	² Includes customers verified as over income, who requested to be de-enrolled, did not reduce usage, or did not agree to be weatherized.								
46	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.								

	A	B	C	D	E	F	G
1	SDG&E PY 2017 CARE Annual Report						
2	CARE Table 4						
3	CARE Self-Certification and Self-Recertification Applications ¹						
4		Provided	Received	Approved	Denied	Pending/Never Completed	Duplicates
5	Total (Y-T-D)	1,559,705	161,796	134,428	10,072	228	17,068
6	Percentage		100%	83%	6%	0%	11%
7	¹ Includes sub-metered customers.						
8							
9							
10							

	A	B	C	D	E	F	G	H	I	J
1	SDG&E PY 2017 CARE Annual Report									
2	CARE Table 5									
3	CARE Enrollment by County									
4	County	Estimated Eligible			Total Participants			Penetration Rate		
5		Urban	Rural ¹	Total	Urban	Rural	Total	Urban	Rural	Total
6	Orange	19,257	0	19,257	10,490	0	10,490	54%	0%	54%
7	San Diego	303,074	7,432	310,506	265,090	5,694	270,784	87%	77%	87%
8	Total	322,331	7,432	329,763	275,580	5,694	281,274	85%	77%	85%
9	¹ Rural includes zip codes classified as such according to the Goldsmith modification that was developed to identify small towns and rural areas within large metropolitan counties.									
10										
11										
12										
13										

	A	B	C	D	E	F	G	H
1	SDG&E PY 2017 CARE Annual Report							
2	CARE Table 6							
3	CARE Recertification Results							
4	2017	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	267,793	3,240	1.2%	2,561	583	79%	0.22%
6	February	269,004	2,931	1.1%	3,136	557	107%	0.21%
7	March	271,727	3,705	1.4%	2,884	694	78%	0.26%
8	April	270,980	3,085	1.1%	2,391	599	78%	0.22%
9	May	271,181	2,317	0.9%	1,724	497	74%	0.18%
10	June	272,771	3,702	1.4%	2,799	755	76%	0.28%
11	July	274,488	2,592	0.9%	1,947	533	75%	0.19%
12	August	278,143	3,279	1.2%	2,402	736	73%	0.26%
13	September	280,446	2,930	1.0%	2,160	668	74%	0.24%
14	October	280,613	3,425	1.2%	2,367	958	69%	0.34%
15	November	281,074	3,491	1.2%	2,484	507	71%	0.18%
16	December	281,274	3,361	1.2%	2,122	116	63%	0.04%
17	YTD	281,274	38,058	13.53%	28,977	7,203	76%	2.56%
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	⁵ There were 1,878 accounts that were excluded from Households Recertified or De-Enrolled process due to any one of the following reasons: account was selected for high usage, account was selected for PEV (show proof of eligibility), or account terminated.							

	A	B	C	D	E	F	G	H	I
1	SDG&E PY 2017 CARE Annual Report CARE Table 7 CARE Capitation Contractors								
2									
3									
4	Contractor Name ¹	Contractor Type (Check one or more if applicable)				Enrollments ²			Total Expenditures
5		Private	CBO	WMDVBE	LIHEAP	Rural	Urban	Total	
6	211 SAN DIEGO		X			0	2,455	2,455	\$ 49,100
7	ALLIANCE FOR AFRICAN ASSISTANCE		X			0	58	58	\$ 1,160
8	AMERICAN RED CROSS		X	X		0	124	124	\$ 2,480
9	CATHOLIC CHARITIES		X			0	4	4	\$ 80
10	CHILDREN'S INITIATIVE		X			0	1	1	\$ 20
11	CHULA VISTA COMMUNITY COLLABORATIVE		X			0	202	202	\$ 4,040
12	COMMUNITY RESOURCE CENTER		X			0	6	6	\$ 120
13	CRISIS HOUSE		X			0	0	0	\$ -
14	DEAF COMMUNITY SERVICES		X			0	3	3	\$ 60
15	FAMILY HEALTH CENTERS OF SAN DIEGO		X			0	0	0	\$ -
16	HEARTS AND HANDS TOGETHER		X			0	4	4	\$ 80
17	HORN OF AFRICA		X			0	6	6	\$ 120
18	INTERFAITH COMMUNITY		X			0	4	4	\$ 80
19	LA MAESTRA FAMILY CLINIC		X			0	71	71	\$ 1,420
20	MAAC PROJECT - CARE		X		X	0	45	45	\$ 900
21	NEIGHBORHOOD HEALTH CARE		X			0	9	9	\$ 180
22	NEIGHBORHOOD HEALTH INSURANCE CENTER		X			0	118	118	\$ 2,360
23	NORTH COUNTY HEALTH SERVICES		X			0	87	87	\$ 1,740
24	SAN DIEGO STATE UNIVERSITY WIC		X			0	66	66	\$ 1,320
25	SAN YSIDRO HEALTH CENTERS		X			0	315	315	\$ 6,300
26	SCRIPPS HEALTH WIC (SHW)		X			0	17	17	\$ 340
27	VISTA COMMUNITY CLINIC		X			0	8	8	\$ 160
28	Total Enrollments and Expenditures					0	3,603	3,603	\$ 72,060
29	¹ All capitation contractors with current contracts are listed regardless of whether they have signed up customers or submitted invoices this year. ² Enrollments reflect new enrollments only.								
30									
31									
32									
33									

	A	B	C	D	E	F	G	H
1	SDG&E PY 2017 CARE Annual Report							
2	CARE Table 8							
3	CARE Participants as of Month-End							
4	2017	Gas and Electric	Gas Only	Electric Only	Total	Eligible Households	Penetration Rate	% Change
5	January	173,385	N/A	94,408	267,793	329,763	81%	-0.53%
6	February	174,563	N/A	94,441	269,004	329,763	82%	0.37%
7	March	175,775	N/A	95,952	271,727	329,763	82%	0.83%
8	April	175,668	N/A	95,312	270,980	329,763	82%	-0.23%
9	May	175,972	N/A	95,209	271,181	329,763	82%	0.06%
10	June	176,429	N/A	96,342	272,771	329,763	83%	0.48%
11	July	177,450	N/A	97,038	274,488	329,763	83%	0.52%
12	August	179,528	N/A	98,615	278,143	329,763	84%	1.11%
13	September	181,012	N/A	99,434	280,446	329,763	85%	0.70%
14	October	181,634	N/A	98,979	280,613	329,763	85%	0.05%
15	November	181,195	N/A	99,879	281,074	329,763	85%	0.14%
16	December	181,746	N/A	99,528	281,274	329,763	85%	0.06%
17								
18								

	A	B	C	D
1	SDG&E PY 2017 CARE Annual Report			
2	CARE Table 9			
3	CARE Average Monthly Usage & Bill			
4				
5	Average Monthly Gas / Electric Usage			
6	Residential Non-CARE vs. CARE Customers			
7	Customer	Gas Therms	Gas Therms	Total
8		Tier 1	Tier 2	
9	Non-CARE	18.0	5.0	23.0
10	CARE	17.0	2.0	19.0
11	Customer	Electric KWh	Electric KWh	Total
12		Tier 1	Tier 2 and Above	
13	Non-CARE	307	134	441
14	CARE	304	64	368
15				
16				
17	Average Monthly Gas / Electric Bill²			
18	Residential Non-CARE vs. CARE Customers¹			
19	(Dollars per Customer)			
20	Customer	Gas	Electric	
21	Non-CARE	\$33.10	\$114.03	
22	CARE	\$21.06	\$50.31	
23				
24				
25	¹ Excludes master-meter usage.			
26	² Average Monthly Gas/Electric Bill reflects residential Non-CARE (CARE) 2017 total billed.			

	A	B	C	D	E	F
1	SDG&E PY 2017 CARE Annual Report					
2	CARE Table 10					
3	CARE Surcharge & Revenue					
4	Electric					
5	CARE Surcharge and Revenue Collected by Customer Class					
6	Class	CARE Surcharge ¹	Monthly Bill	as Percent of Bill	Collected	Revenue Collected
7	Residential	\$1.59	\$106	1.50%	\$19,374,020	29.84%
8	Commercial	\$15.53	\$847	1.83%	\$27,738,431	42.73%
9	Agricultural	\$24.79	\$1,172	2.12%	\$1,175,242	1.81%
10	Large/Indust	\$2,123.85	\$67,765	3.13%	\$16,629,773	25.62%
11						
12						
13						
14	GAS					
15	CARE Surcharge and Revenue Collected by Customer Class					
16	Customer	Average Monthly		CARE Surcharge	Total CARE	Percentage of
17	Class	CARE Surcharge ²	Monthly Bill	as Percent of Bill	Surcharge Revenue	CARE Surcharge
18	Class	CARE Surcharge ²	Monthly Bill	as Percent of Bill	Collected	Revenue Collected
19	Residential	\$0.53	\$31	1.69%	\$4,230,094	44.68%
20	Commercial	\$10.70	\$323	3.31%	\$3,863,271	40.81%
21	Natural Gas Vehicle	\$979.47	\$13,322	7.35%	\$433,905	4.58%
22	Industrial	\$1,537.90	\$4,509	34.10%	\$939,659	9.93%
23						
24	¹ Excludes CARE customers. Pursuant to D. 15-07-001, OP 4 and Section 11.1.1 authorizes adjustments to CARE to transition to the legislatively-mandated CARE discount range in compliance with Section 739.1 were authorized. Effective 9/1/15 per AL 2783-E, CARE customers receive non-CARE rates; therefore, there is no longer a CARE Rate subsidy.					
25	² Excludes CARE customers.					
26						
27						

	A	B	C	D	E	F
1	SDG&E PY 2017 CARE Annual Report					
2	CARE Table 11					
3	CARE Capitation Applications ¹					
4	Entity	Total Received	Approved ²	Denied	Pending/ Never Completed	Duplicate
5	211 SAN DIEGO	4,654	3,451	169	1	1,033
6	ALLIANCE FOR AFRICAN ASSISTANCE	83	71	1	0	11
7	AMERICAN RED CROSS	366	304	17	0	45
8	CATHOLIC CHARITIES	8	7	1	0	0
9	CHILDREN'S INITIATIVE	1	1	0	0	0
10	CHULA VISTA COMMUNITY COLLABORATIVE	378	357	4	0	17
11	COMMUNITY RESOURCE CENTER	8	8	0	0	0
12	CRISIS HOUSE	0	0	0	0	0
13	DEAF COMMUNITY SERVICES	5	5	0	0	0
14	FAMILY HEALTH CENTERS OF SAN DIEGO	0	0	0	0	0
15	HEARTS AND HANDS TOGETHER	23	20	1	0	2
16	HORN OF AFRICA	11	10	0	0	0
17	INTERFAITH COMMUNITY	6	5	1	0	0
18	LA MAESTRA FAMILY CLINIC	409	272	33	0	104
19	MAAC PROJECT - CARE	96	77	3	0	16
20	NEIGHBORHOOD HEALTH CARE	21	19	0	0	2
21	NEIGHBORHOOD HEALTH INSURANCE CENTER	423	295	40	0	88
22	NORTH COUNTY HEALTH SERVICES	298	192	40	0	66
23	SAN DIEGO STATE UNIVERSITY WIC	119	104	5	0	10
24	SAN YSIDRO HEALTH CENTERS	977	780	53	0	144
25	SCRIPPS HEALTH WIC (SHW)	22	19	2	0	1
26	VISTA COMMUNITY CLINIC	20	18	0	0	2
27	Total	7,928	6,015	370	1	1,541
28						
29						
30	¹ Includes sub-metered customers.					
31	² Includes new enrollments and recertification applications approved.					
32						

	A	B	C	D	E	F	G
1	SDG&E PY 2017 CARE Annual Report						
2	CARE Table 12						
3	CARE Expansion Program						
4							
5	Participating Facilities by Month						
6	2017	Gas			Electric		
7		CARE Residential Facilities	CARE Commercial Facilities	Total Gas	CARE Residential Facilities	CARE Commercial Facilities	Total Electric
8	January	278	124	402	540	175	715
9	February	278	124	402	540	175	715
10	March	278	124	402	540	175	715
11	April	278	124	402	540	175	715
12	May	276	124	400	538	175	713
13	June	275	124	399	538	175	713
14	July	275	124	399	538	175	713
15	August	275	124	399	538	175	713
16	September	274	124	398	538	175	713
17	October	274	124	398	538	175	713
18	November	274	123	397	538	175	713
19	December	274	123	397	496	175	671
20							
21							
22	Average Monthly Gas / Electric Usage ¹						
23	Customer	Gas	Electric				
24		Therms	KWh				
25	Residential Facilities	31	559				
26	Commercial Facilities	377	9,470				
27							
28							
29	CARE Expansion Self-Certification and Self-Recertification Applications						
30		Received	Approved	Denied	Pending/Never Completed	Duplicates	
31	Total	13	8	0	0	5	
32	Percentage		62%	0%	0%	38%	
33							
34							
35	¹ Excludes master meter usage.						

	A	B	C	D	E	F	G	H	I	J
1	SDG&E PY 2017 CARE Annual Report									
2	CARE Table 13									
3	CARE High Usage Verification Results ⁵									
4	Stage 1 - IRS Documentation and ESA Agreement				Stage 2 - ESA Participation			Stage 3 - Usage Monitoring		
5	Households Requested to Verify	Removed (No Response)	Removed (Verified Ineligible) ¹	Income Verified and Referred to ESA	Failed and Removed ²	Ineligible ³	Completed	Removed ⁴	Appeals Denied	Appeals Approved
6	7,941	5,459	321	2,161	401	198	1,562	2	11	24
7										
8	¹ Includes customers who were verified as over income, requested to be removed, or did not agree to participate in ESA Program.									
9	² Includes customers who declined to participate in ESA Program, failed to respond to appointment requests, or missed multiple appointments or denied access to all rooms.									
10	³ Includes customers who previously participated in ESA Program, did not meet the three-measure minimum, landlord refused, etc. These customers move directly to Stage 3.									
11	⁴ Customers removed for exceeding 600% of baseline in any monthly billing cycle.									
12	⁵ High usage is defined as a customer that exceeds 400% or 600% of baseline.									
13										
14										

	A	B	C	D	E	F	G	H	I
1	SDG&E PY 2017 CARE Annual Report								
2	CARE Table 13A								
3	CARE Customer Usage and ESA Program Treatment ³								
4									
5	# of CARE customers at or above 90th Percentile of Usage Not subject to High Usage PEV ¹	Percent of those CARE customers Not served by ESA Program ²	# of Enrollments led to ESA Program measure Installations	# of Long-Term tenancy CARE customers who have Not applied for ESA Program	Energy Usage of Long-Term Tenancy CARE Customers				Energy Usage of CARE customers who do Not accept ESA Program treatment
6					Energy Usage before ESA Program treatment	Energy Usage within 3-months of ESA Program treatment	Energy Usage within 6-months of ESA Program treatment	Energy Usage within 12-months of ESA Program treatment	
7	12,192	40%	0	0	0	0	0	0	0
8									
9									
10									
11									
12									
13									

¹ Those CARE customers who have been on CARE rate at the same meter for a least six years.

² Those CARE customers who have not participated in the ESA Program prior to receiving targeted marketing.

³ SDG&E will implement "targeted marketing" to this group 2nd quarter 2018.

	A	B
1	SDG&E PY 2017 CARE Annual Report	
2	CARE Table 14	
3	Categorical Enrollment	
4	Type of Enrollment	Number of Customer Enrollments¹
5	Bureau of Indian Affairs General Assistance	81
6	CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	19,927
7	CalWORKs/Temporary Assistance for Needy Families (TANF) ²	3,177
8	Head Start Income Eligible - (Tribal Only)	345
9	Healthy Families A&B	0
10	Low-income Home Energy Assistance Program (LIHEAP)	3,092
11	Medicaid/Medi-Cal	44,207
12	National School Lunch Program (NSLP) - Free Lunch	14,341
13	Supplemental Security Income (SSI)	9,515
14	Tribal TANF ²	0
15	Women, Infants, and Children Program (WIC)	11,568
16		
17	¹ Number of customers enrolled reflects categorical programs selected by customer. Customers may select more than one eligible program for a single account.	
18	² CalWORKS and Tribal TANF are combined categorical programs with no distinction between the two programs.	