7 APPENDIX B: MF WORKING GROUP ANNUAL REPORT – 2018 ACTIVITY

2018 Multi-family Working Group (MFWG) Annual Report

FINAL – 12/31/2018

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The MFWG Overview

The MFWG was established to support the integration of common area measures for deed restricted multifamily (MF) properties into the Energy Savings Assistance (ESA) Program and other MF directives as specified in California Public Utilities Commission (CPUC or Commission) Decision (D.) 16-11-022 as modified within D.17-12-009. As specified in the CPUC Decision, the MFWG will produce two annual reports: (1) 2018 Interim Annual Report, (2) 2019 Final Annual Report.[1] This report is intended to meet the filing requirement for the 2018 MFWG Interim Annual Report.

To support a collaborative reporting effort, the 2018 progress report is prepared with a collaborative effort. The IOUs, NRDC and the MFWG facilitator all contributed to the various sections of this report.

MFWG Membership and Structure

The MFWG operated using the following structure:

- All interested organizations may participate in the MFWG activities.
- The MFWG is not a decision-making body.
- All participants in the MFWG have the same privilege to participate in the working group activities.
- The MFWG strives for consensus and will fully discuss alternate approaches to program designs.
- Non-consensus issues are elevated to the CPUC for resolution.
- The MFWG meets on a quarterly basis, supplemented by topic-specific Ad Hoc Meetings.

2018 MFWG Activities & Accomplishments

The existing ESA Program provides free energy efficient appliances, weatherization, and lighting measures to qualifying low-income residential single-family, multifamily and mobile home customers. D. 16-11-022, expanded the ESA Program in California to include common area measures (CAM) for deed-restricted MF housing and allotted $80M statewide through program year 2020.

Additionally, D. 16-11-022 as modified by D.17-12-009 implemented policy revisions that may increase potential in-unit and common area energy savings for MF properties. The enhanced policies are (1) removal of the ESA Go Back Rule; (2) elimination of the Modified Three Measure Minimum Rule; (3) replacing CFLs with LEDs; (4) removal of measure caps; and (5) revision of

[1] D.17-12-009

refrigerator replacement policy from pre-1999 to pre-2001. Below, please find ESA MF CAM Initiative progress report by IOUs:

PG&E Progress Report

Program pipeline – PG&E

In 2018, to build the pipeline for the ESA Common Area Measure (CAM) offering, the PG&E team began conducting outreach to a number of stakeholders. Through PG&E's Single Point of Contact (SPOC), the new CAM offering was communicated to property owners at major affordable housing conferences in 2018, including:

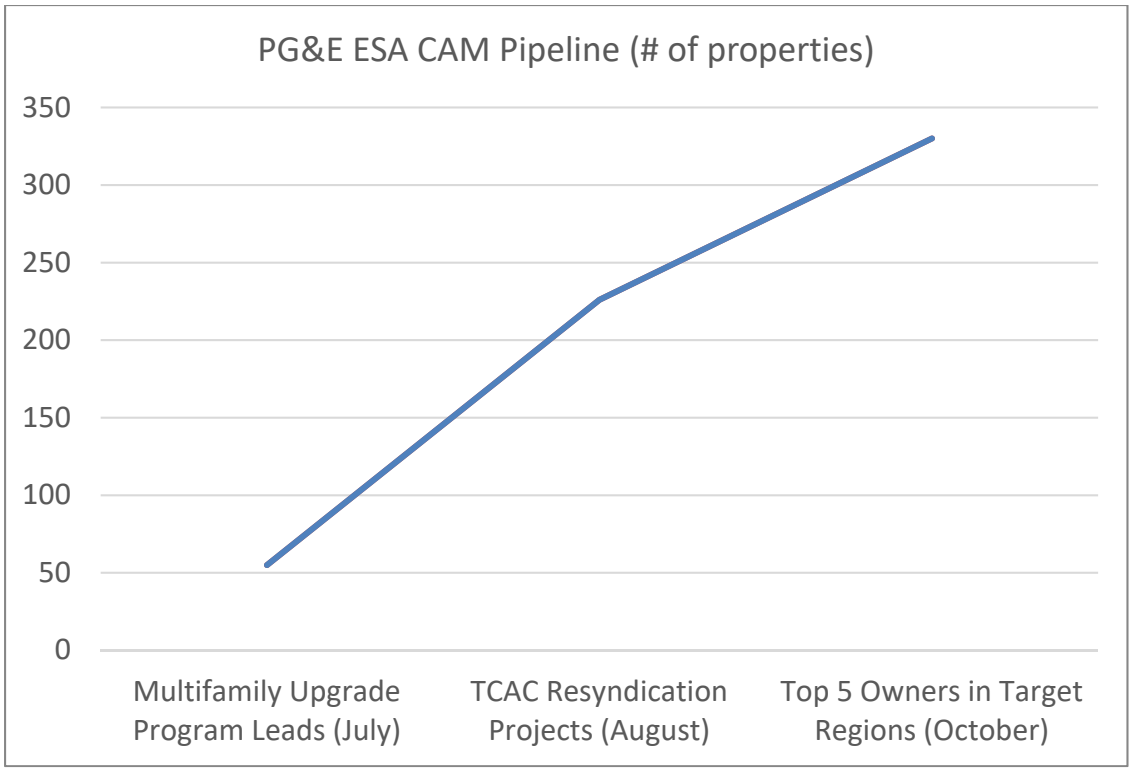
- Non-Profit Housing (NPH) annual conference
- San Joaquin Valley Housing Summit
- California Coalition of Rural Housing annual summit

This preliminary outreach is underway while the PG&E team finalizes CAM measure requirements, public facing materials, and policy and procedures. To date, PG&E has identified approximately 10 properties that are interested in exploring CAM improvements in the immediate term.

Based on PG&E's CAM market assessment PG&E identified approximately 350 properties as high priority outreach targets, which have participation potential, including the number and location of eligible properties, possible measures by space type, as well as programs and other resources PG&E may leverage to extend program dollars. The current pipeline consists of:

- PG&E Multifamily Upgrade Program (MUP) participants whose properties are deed restricted housing (MUP is PG&E's whole-building energy efficiency program that has operated since 2014)
- Projects undergoing major rehab and re-syndication through the TCAC Tax Credit Allocation Committee (TCAC), including 2018 round 1 and 2 awarded projects
- Properties owned or managed by top five property management organizations in target regions

PG&E is also identifying properties where a high number of residents received ESA in-unit treatment, these properties as well as referrals from ESA in-unit contractors will be added to the pipeline over time.



Property Type	%
Small (<50 units)	30%
Large (51 units+)	70%
*Urban	60%
*Rural	40%

*Urban is defined as top 20 metropolitan areas in California. Rural is all other areas

** The above definition/classification of property size is limited to PG&E only.

Program accomplishments – PG&E

PG&E is in the process of engaging various ESA MF CAM projects but has nothing to report at this time. To verify income eligibility ESA CAM prospective projects, the PG&E team is collecting documentation of the property deed-restriction, such as a the TCAC regulatory agreement. The PG&E team compares income limits identified in the deed restriction to verify ESA income eligibility.

PG&E is documenting the number of residents that meet the ESA income criteria, including those properties that do not qualify for ESA CAM, if resident incomes are known (ESA CAM requires that

at least two-thirds of residents meet income requirements). PG&E is also utilizing the statewide ESA Property Owner Affidavit to authorize whole-building treatment (both in-unit and common area). The PG&E team will benchmark each property that receives CAM treatment. This effort will build upon and leverage procedures developed by the ongoing benchmarking support provided to multifamily property owners through PG&E's Multifamily Upgrade Program.

PG&E	2018	2019
Projects, kW/kWh and Therm	N/A	--
Program qualification summary (tracking of deed restricted and % of qualified tenant per MF building)	N/A	--
# of building participated in benchmarking: None	N/A	--
# of building participated in benchmarking	N/A	--

Program challenges and success – PG&E

- **Contractor availability and coverage** - The market assessment identified contractors supporting multifamily programs serving PG&E customers. These programs include the PG&E's Multifamily Upgrade Program, the CSD Low Income Weatherization Program (LIWP), the Bay Area Multifamily Building Enhancements (BAMBE), and PG&E's ESA and Middle-Income Direct Install (MIDI) programs. The market assessment also identified regions where contractor service area gaps exist, including the central coast and eastern Fresno and Madera counties. PG&E's ESA CAM offering will allow onboarding of new contractors to fill these gaps as projects are identified.

- **Single Point of Contact** - Through SPOC we have processed 140 referrals with a total of 13 applications through October in 2018

Program	Referrals	Applications
Energy Savings Assistance	17	0
Moderate Income Direct Install	17	0
Multifamily Upgrade Program	51	2
Bay Area Multifamily Buildings Enhancements Program	24	7
Low Income Weatherization Program	3	0
Electric Vehicle Charge Network	13	1
On Bill Financing	20	16
Cooling Optimizer	3	0
Self Generation Incentive Program	2	0
Automated Demand Response	2	0
California Solar Initiative—Thermal	1	0
Total	140	13

- **Comprehensive vs Common Area Treatment from the perspective of tenant outreach and treatments** - TRC is establishing collaboration protocol with the ESA implementers to do tenant outreach and in-unit tenant treatment in coordination with the ESA income qualified services.

- **Integration with re-syndication activities and collaboration with other entities** - The PG&E team met with the Tax Credit Allocation Committee to identify properties that applied for first and second round 4% and 9% low-income housing tax credits and coordination opportunities with ESA CAM. This coordination is ongoing and is in collaboration with the California Energy Commission and their Clean Energy in Low Income Multifamily Buildings (CLIMB) action plan. The ESA MFWG has also identified properties that will likely apply for re-syndication in future years, based on typical re-syndication timeframes. PG&E is reaching out to these property owners as well to inform owners about CAM and to identify opportunities to collaborate on retrofits associated with re-syndication or stand-alone improvements. PG&E is also exploring opportunities to support properties at risk of conversion to market rate, though this would require the property to have the ability to extend or issue an updated deed restriction.

SCE Progress Report

Program pipeline – SCE

In September, SCE developed an ESA Program flyer that focused on the multifamily segment and the benefits to property owners/managers. The flyer was utilized during the Southern California Association of Non-Profit Housing annual conference on September 28, 2018.

As of October 2018, SCE is in discussion with a non-profit organization that has six potential properties. In addition, there are two properties that both SoCalGas and SCE are in the preliminary phase of coordination, which will include identifying and assigning a joint SCE/SoCalGas contractor and scheduling a walk-thru of the site(s) at which point the project would be turned over to the contractor to perform ESA Program services (tenant units and common area, if eligible). Also**,** SCE began to develop a list of multifamily properties to prioritize program activity by utilizing data analytics to evaluate items such as energy use and previous participation to identify high opportunity properties, including overlaying TCAC and HUD properties. This process is included as part of the analysis of non-deed restricted multifamily properties submitted to the MFWG on October 29, 2018.

Program accomplishments – SCE

During the MFWG Quarterly Meeting in April 2018, the ESA CAM metrics that were filed in each of the IOUs implementation plans were reviewed and discussed, including introduction of proposed metrics by individual stakeholders. SCE is committed to continuous improvement and identifying

additional metrics that may need to be tracked but must take all factors into consideration including costs and/or resources impacts.

SCE	2018	2019
Projects, kW/kWh and Therm	N/A	--
Program qualification summary (tracking of deed restricted and % of qualified tenant per MF building)	N/A	--
# of building participated in benchmarking: None	N/A	--
# of building participated in benchmarking	N/A	--

Program challenges and success – SCE

- ***Contractor availability and coverage*** - SCE's ESA Program has 23 contractors that cover its service territory. In August, SCE reached out to its ESA Program network of contractors to obtain information on their respective abilities to deliver MF CAM services, such as performing as a Single Point of Contact (SPOC) and installing common area measures. After further review and evaluation of information received from the contractors, SCE identified three contractors to provide a comprehensive delivery of the ESA Program multifamily CAM initiative and issued contracts in late October. At this time, multifamily property owners interested in MF CAM services have the option of selecting from any of the three authorized contractors.

- ***Single Point of Contact*** - SCE is utilizing two types of SPOCs to bridge the gap and needs of small to large multifamily properties; a dedicated SCE SPOC and an authorized Contractor SPOC. Both SPOC types will work directly with multifamily customers to promote ESA and other complementary programs, evaluate the properties, and assist through the application process. In addition, the Contractor SPOC will be able to provide a seamless delivery of products and services in both common area and dwelling units. In November, SCE provided the three authorized contractors with training on the role and responsibilities of a SPOC, including training on a new system enhancement that will be utilized to track multifamily projects.

- ***Comprehensive vs Common Area Treatment from the perspective of tenant outreach and treatments*** - The objective of utilizing existing ESA contractors as a SPOC is to facilitate engagement of each multifamily property customer, both owner and tenant. SCE's top-down approach will provide eligible multifamily property customers the opportunity to receive both dwelling and common area measures without the need for door-to-door activity. If additional measures (e.g., advanced power strip, torchiere lamps, etc.) owned by the tenant are feasible, then the tenant would work with the ESA contractor for participation.

- **Integration with re-syndication activities and collaboration with other entities -** In September, the MFWG reviewed a list of predicted re-syndication projects in California. As a result, SCE identified approximately 45 projects within its service territory and will be included in the analysis to prioritize targeting. Upon engaging these projects, SCE will track results, including any feedback that may be obtained from multifamily property customers and contractors.

SoCalGas Progress Report

Program pipeline – SoCalGas

Based on AL 5264 submitted March 1, 2018, SoCalGas' objective is to complete the pilot projects and identify lessons learned and adjust the common area measures (CAM) to deliver high- quality process and measures to meet the needs of multi-family (MF) customers. Based on feedback from the Statewide Multi-Family Working Group (MFWG), SoCalGas is developing a standard for identification and installation of water heaters for smaller MF properties. Specific projects have been identified in SoCalGas' initial launch and potentially 50 – 75 properties could utilize this standard using SoCalGas' current Energy Savings Assistance (ESA) Program contractor base. Once a standard is in place, a long-term strategy will be developed to determine the scope of the pipeline potential.

Program accomplishments – SoCalGas

SoCalGas has completed one common area pilot project, Pilot Project 2, in Santa Ana, California, which is a re-syndication property. The CAM addressed central domestic hot water systems, in which six (6) 100-gallon, 199,000 Btuh hot water heaters were installed as a kind for kind equipment replacement. The equipment was de-rated from its original 80% thermal efficiency to between 60% - 72% thermal efficiency based on the make and model number and adjusted for the age of the equipment. SoCalGas continues to coordinate with the property owner to determine if in-unit measures are feasible because of deep retrofits for this site. Additionally, SoCalGas has two additional pilot projects scheduled to be completed in the first two quarters of 2019. The energy savings for Pilot Project 2 was 7,960 Btuh of annual therm savings per year. As of October 31, 2018, SoCalGas has reported $137,230 in MF CAM expenses. This includes costs for administration and outreach/assessment, e.g., ASHRAE Level II audits.

Per the Multi-Family Property Owner Authorization and Affidavit, property owners for the three pilot projects have identified that 65% or more of the tenants are income qualified. For Pilot Project 1, SoCalGas was able to enroll 1,010 out of 1,053 units (96%) for in-unit ESA Program treatment. For the pilot projects, all customers receiving CAM will be required to conduct EPA Portfolio Manager Benchmarking.

SoCalGas	2018	2019
Projects, kW/kWh and Therm	7,960	--
Program qualification summary (tracking of deed restricted and % of qualified tenant per MF building)	65%	--
# of buildings participated in benchmarking:	N/A*	

*benchmarking to be conducted in Q1 2019 for Pilot Project 2

Other relevant program metrics

- Operational metrics – Two pilot projects that SoCalGas is working on are scheduled to be completed in the first two quarters of 2019. SoCalGas does not have any operational metrics to report at this time.
- Strategic metrics – Two pilot projects that SoCalGas is working on are scheduled to be completed in the first two quarters of 2019. SoCalGas does not have any strategic metrics to report at this time.

Program challenges and success – SoCalGas

- **Contractor availability and coverage** – Implementation of natural gas CAM is a highly technical and complex process. Each SoCalGas CAM project is custom designed, unlike deemed lighting measures projects that are based on a "plug and play" installation process. SoCalGas' CAM focuses on boilers and hot water heaters for central systems within the common area facilities of MF properties. This undertaking has resulted in the use of ASHRAE Level II audits and engineering design sets. These complex evaluations have necessitated Requests for Proposals (RFP) because the ESA Program contractor base does not currently have the required California State License to install boilers (C-4). However, because of these projects, SoCalGas is evaluating whether installation standards can be developed to support similar equipment types. SoCalGas is developing a standard for identification and installation of water heaters for smaller MF properties. SoCalGas has identified 50-75 properties that have immediate potential to use this standard with SoCalGas' current ESA Program contractor base. This standard is anticipated to be available in Q2 of 2019 and is based on Pilot Project 2.

- **Single Point of Contact** – SoCalGas has had a Single Point of Contact (SPOC) for over three years. SoCalGas' SPOC continues having great success in working with MF property owners as exhibited by SoCalGas' three pilot projects and the installation of ESA Program in-unit measures with nearly 6,000 treated units completed year-to-date for 2018 for all MF properties.

- **Comprehensive vs Common Area Treatment from the perspective of tenant outreach and treatments** – SoCalGas has been very successful with incorporating a comprehensive approach for CAM. For example, in Pilot Project 1 in Downtown Los Angeles, the SPOC has coordinated ESA Program in-unit treatments for 1,010 out of 1,053 units. Working with the Los Angeles Department of Water and Power (LADWP), common area lighting was installed for both exterior hallways and parking lots, as well as the proposed replacement of toilets with high efficiency low flow toilets. SoCalGas also evaluated Solar Thermal, Energy Upgrade California and Multifamily Energy Efficiency Rebates (MFEER) for the current pilot projects but determined that they were not currently viable. SoCalGas will continue to explore these options for future MF CAM projects. SoCalGas has also coordinated with SCE to introduce their CAM lighting for the Santa Ana and Rancho Cucamonga projects.

- **Integration with re-syndication activities and collaboration with other entities** - SoCalGas, along with the other IOUs, reviewed the master list provided by the Energy Division (ED) to determine which IOU service territory the re-syndication properties were located in. SoCalGas has selected a re-syndication pilot in Santa Ana to evaluate how to best incorporate re-syndication properties within the CAM process. The CAM portion of the pilot was completed in Q4 2018. This includes the replacement of six 100-gallon commercial /central domestic hot water heater systems. Some preliminary lessons learned from this project include timeline uncertainty and deep in-unit retrofits that limit or exclude in-unit measure installation. This project has experienced shifts in the timeline due to property owner challenges with city permitting and internal company budget delays. This caused the timeline to move from a 2nd quarter 2018 start date to the 4th quarter of 2018. Coordination with the property owner is extremely important when working with re-syndication projects and these delays impact all parties, including the IOUs, contractors, and property owner maintenance staff. Also, this project focuses on deep retrofits within the units, complete replacement of kitchens, bathrooms, windows, doors and furnaces. With the replacement of these areas, ESA Program measures, such as faucet aerators, shower heads, and weatherization, become non-feasible measures and in such a case, all possible in-unit treatment may be excluded.

SDG&E Progress Report

In compliance with D.17-12-009, SDG&E filed Advice Letter 3196-E/2654-G of its ESA MF CAM Implementation Plan.[2] The Commission approved SDG&E's Advice Letter, as filed, on May 30, 2018 providing SDG&E the authorization to proceed with the MF CAM initiative under the ESA Program. SDG&E's design approach is to utilize one program implementor for the MF CAM initiative under

[2] SDG&E filed Advice Letter 3196-E/2654-G on March 30, 2018.

the ESA Program who will act as a single point of contact (SPOC) for property owners and operators eligible to participate for the installation of common area measures.

Program pipeline – SDG&E

The ESA Program MF CAM implementor contract was signed in late September 2018. The program implementor has been establishing processes and procedures to begin outreach efforts of the MF CAM initiative to property owners and operators. At this time, SDG&E does not have any specific projects in the pipeline but has developed targeted marketing and outreach list and has begun initial outreach efforts. SDG&E anticipates a pipeline of projects will be created at the end of 2018 and anticipates conducting audits for those projects to begin measure installation by the first quarter of 2019.

Program accomplishments – SDG&E

To-date, SDG&E has not completed any ESA Program MF CAM projects. Since receiving approval on May 30, 2018, SDG&E has secured a contractor to implement the initiative, develop processes to coordinate with in-unit contractors, and is modifying its enrollment platform to support program implementation. SDG&E has also developed a MF assessment form which helps screen properties and identify programs for eligibility, including ESA Program MF CAM. SDG&E continues to make progress in the full implementation of the ESA Program MF CAM initiative and anticipates measure installation to begin in the first quarter of 2019.

SDG&E	2018	2019
Projects, kW/kWh and Therm	N/A	--
Program qualification summary (tracking of deed restricted and % of qualified tenant per MF building)	N/A	--
# of building participated in benchmarking: None	N/A	--
# of building participated in benchmarking	N/A	--

Other relevant program metrics

- Operational metrics: No data to provide
- Strategic metrics: In November, SDG&E ESA Program CAM implementor began targeting 10 re-syndication multifamily properties identified in SDG&E's service territory. Additionally, SDG&E has identified an additional 17 deed restricted multifamily properties which have previously participated in ESA's in-unit program and had a high concentration of low-income units. SDG&E's program implementor is targeting these properties as part of the initiative strategy. Results of these efforts are pending.

Program challenges and success – SDG&E

- **Contractor availability and coverage -** SDG&E did not have difficulty identifying contractors to support the ESA Program MF CAM initiative. SDG&E is using an implementor for all aspects of the initiative, including outreach, benchmarking, audits, and measure installation. The implementor will be responsible for subcontracting for any installations which they cannot perform. SDG&E finds that this approach streamlines the installation processes for the property owner and encourages a SPOC approach. The implementor will also facilitate the communication with the property owner for any in-unit measures which will be installed by the ESA Program.

- **Single Point of Contact -** SDG&E has developed a SPOC process which will help generate leads for ESA Program MF CAM, as well as for other programs offered by SDG&E. SDG&E and its MF CAM implementor will generate leads for the program. In addition, the ESA Program MF CAM Implementer will serve as the primary contact for the property owners. SDG&E's Internal and external SPOC process will generate leads through a variety of means, including:
  - A webpage where property owners and managers can access information on a variety of MF energy efficiency programs and fill out a short online interest form;
  - SPOC networking and outreach efforts, such as association roundtables and conferences;
  - Inbound calls made to SDG&E's Energy Savings Call Center requesting energy savings assistance;
  - Referrals from a variety of program implementers and advisors;
  - Referrals from the Home Energy Audit Team who may be called upon to investigate high bill inquiries;
  - Account Executives serving MF property owners;
  - Leveraging ESA Program in-unit MF property participation information and the Solar on Multifamily Affordable Housing (SOMAH) program;
  - Call campaigns are being made targeting deed restricted properties;
  - SDG&E is anticipating expanding the call campaigns to include non-deed restricted MF properties and is also working to develop targeted email campaigns.

- **Comprehensive vs Common Area Treatment from the perspective of tenant outreach and treatments -** SDG&E aims to provide comprehensive treatment for properties participating in ESA Program MF CAM. However, property owners and managers will not be required to install measure in-unit as a requirement to receive ESA Program MF CAM. One of SDG&E's approaches to providing comprehensive solutions is to initially target properties who have been identified as deed-restricted and have had a significant number of tenants participating and receiving ESA in-unit

treatment. This approach allows us to target properties where we are likely to be able to qualify the facility as eligible for ESA MF CAM. SDG&E's ESA Program MF CAM implementor is also working closely with current ESA in-unit, Multifamily Energy Efficiency Rebate (MFEER) and SOMAH program implementors to leverage outreach efforts for MF properties.

- **Integration with re-syndication activities and collaboration with other entities -** SDG&E is leveraging information on re-syndication projects as part of the targeted marketing strategy. Currently, SDG&E has identified 10 properties in their service territory whose applications are up for renewal. SDG&E's ESA Program MF CAM implementor has begun conducting outreach efforts to these property owners. SDG&E has reached out to the SOMAH program implementors to coordinate outreach and enrollment strategies. Given the similarity of the program eligibility guidelines, the coordination effort would be mutually beneficial and provide potential operational efficiencies for the programs. Monthly discussions have been established to ensure leveraging opportunities are maximized for the programs and to provide property owners with a comprehensive list of program offerings.

Other Mandated ESA MF CAM Initiative Activities

In addition to IOU specific ESA MF CAM Initiative progress report, the MFWG will also report the below topics concerning the overall ESA MF CAM Initiative.

Evaluate the effectiveness of 65% income qualified threshold for ESA MF CAM participation

Per Decision 17-12-009, the lower threshold for ESA Program MF CAM of 65% is expected to be evaluated by the IOUs during this program cycle and this program qualification threshold is subject to modification for the upcoming program cycle. The IOUs have submitted their initial Statements of Work (SOWs) for this analysis. The findings from the IOUs analysis will be shared with the MFWG participants to gather feedback by early 2019. The results of the analysis and discussions will be a part of the next ESA program application in 2019.

Status of CARE expansion

The MFWG does not recommend adding common area meters for multifamily deed restricted properties to the CARE Expansion Program at this time. The Application Decision requires the MFWG to assess whether the common area meters of deed-restricted properties should be granted access to the CARE rate. On April 26, 2018 and May 9, 2018, the MFWG met to discuss the potential inclusion of deed-restricted common area meters in the CARE Expansion Program. Currently the MFWG is not recommending expansion of CARE eligibility to common area meters of deed-restricted properties for the reasons identified below. First, the Multifamily Common Area Measure (CAM) Initiative is new and has just begun to be implemented; and, the continuance of

the initiative beyond 2020 has not been determined. Therefore, it is premature to propose expanding CARE eligibility for this effort. Second, additional research and analysis, as well as the need to assess potential customer and policy impacts, is necessary to make an informed decision about expanding CARE eligibility to common area meters of deed-restricted multifamily properties.

Description of the Collaborative Process for Statewide ESA MF CAM Initiative Filing

D.16-11-022 establishes a Multifamily Working Group (MFWG) to ensure a successful implementation of the multifamily initiatives under the ESA Program. MFWG members include: Energy Division, the California Energy Commission (CEC), investor-owned utilities (IOUs), the Office of Ratepayer Advocates (ORA), local government, program implementers, and other interested participants. Subsequent to D.16-11-022, the Commission issued D.17-12-009 to establish clear and formalized deliverables and deadlines for the multifamily initiatives. D.17-12-009 directs the IOUs to review and discuss their multifamily implementation plans with the MFWG and seek to establish consensus on key issues prior to submitting their plans in a Tier 2 Advice Letter filing.[3] OP 66 of D.17-12-009 also directs the following:

- The IOUs to provide a draft implementation plan to the MFWG by January 15, 2018.[4]
- The MFWG to confer, and the MFWG facilitator to summarize and circulate to the MFWG (which includes IOUs) areas of consensus among stakeholders, and identifying any areas discussed where there is not consensus by January 30, 2018.
- By February 13, 2018, individual stakeholders may also submit separate recommendations to the MFWG addressing issues where there is not consensus.
- After making appropriate modifications, the IOUs shall submit the Advice Letter by March 1, 2018.

On March 1, 2018, the IOUs submitted their implementation plans for ESA CAM for review and approval by the CPUC. The utilities each presented different approaches for the multifamily initiative, utilizing both a direct install approach, and a custom approach allowing for customer and contractor choice. As part of these plans, the IOUs also requested flexibility to modify their designs based on lessons learned or best practices from other utilities or identified best practices found by other program designs outside of the utility. To date, the ESA MF CAM initiative is still in the development and early implementation phase for all the IOUs, and a complete CAM initiative has not yet been fully implemented. Once projects have been completed, and data can be gathered, the utilities can begin to discuss optimizing their multifamily initiative designs and implementing best practices that have been identified.

[3] D.17-12-009, p.59.
[4] D.17-12-009, OP 66.

Summary of MFWG discussions, agreement and conclusion on new program metrics to be tracked for 2019 and beyond

The ESA Program impact on energy savings and health, comfort, and safety in California's deed-restricted, affordable multifamily housing market requires more strategic measurement if it is to be accountable to the state's ambitious greenhouse gas emissions targets for buildings. This year the MFWG has focused on finding agreement on ways to contribute to the ongoing discussion at the state level about how to measure the efficacy of investments in this building segment, with a focus on metrics that would inform and improve the future ESA CAM Initiative implementation cycle.

Through a series of MFWG meetings, the working group generated two metrics that could be incorporated into ESA CAM for 2019 and beyond, building from presentations led by Isaac Sevier at the Natural Resources Defense Council. These two metrics would bring the CAM portion of ESA closer in line with reporting from other leading weatherization and energy efficiency programs, including the Department of Energy's Weatherization Assistance Program and the California Department of Community Service's Low-Income Weatherization Program.

The metrics proposed by the MFWG are quantitative in nature, would be feasible and reasonable to implement according to the program managers, and would enhance ESA CAM's transparency, accountability, and ability to continuously improve as the program evolves.

<u>Suggested metrics for ESA CAM in 2019 and beyond</u>

- **Measuring program uptake, also called "conversion rate" by some utilities.**

  This metric would require recording and reporting on the number of properties that complete the CAM process (by adopting all of its applicable measures) and the number of properties reached through either the utility's initial outreach or through a direct inquiry from the SOMAH (Solar On Multifamily Affordable Housing Program) customers. The metric could be reported as a percent or as a raw count of 1) properties completing CAM and 2) properties recorded as having "initial engagement" about CAM (with initial engagement including direct inquiry from the customer or solicitation by the utility, depending on the utility's respective outreach model).

  ESA CAM already reports on the number of buildings in the program, and this metric would be calculable with little additional work. Adding the additional data point would potentially require updates or resources to the utilities' internal data management systems, but that additional cost could be negated if existing reporting requirements (i.e. the monthly ESAP reports) were adjusted for ESA CAM tables. In order to make this metric as informative and useful as possible, this should be aligned with the current reporting requirements for

buildings enrolled in the program and may require more discussion on the distinction between "properties" and "buildings."

SoCalGas notes that due to their program design and the process used to identify and target buildings for participation, an uptake metric applied across the entire ESA CAM may not fit all programs equally well. SCE also notes that this data may be able to help inform the CPUC's future decision on whether to expand ESA CAM beyond deed-restricted multifamily properties if data on reasons property owners failed to enroll after initial engagement were also collected.

- **Tracking additional investment in buildings treated under ESA CAM or "leveraging", also called "comprehensiveness" by some utilities.**

  This metric would require recording and reporting on other ratepayer or state and federal programs which are implemented concurrently with ESA CAM, as well as recording and reporting on other private investment made in the buildings (as data is available) at the same time as ESA CAM. This metric could be reported as a dollar figure in the aggregate or, for more granular understanding, separated into "dollars leveraged from other ratepayer programs," "dollars leveraged from state programs," "dollars leveraged from federal programs," and "dollars leveraged from private financing."

  For the in-unit portion of ESAP, SDG&E notes that their program already collects and reports on leveraging efforts with multiple programs including CSD and local water agencies and reports on this annually. CAM reporting on leveraging could follow a similar approach.

  Concerns were raised about whether requiring or requesting data from building owners about additional financing or program investment would discourage participation in ESA CAM. Other programs like WAP or LIWP that successfully collect this data could serve as models for how to deploy within CAM.

Potential areas of concern outside the scope of MFWG

In the course of coming to agreement about these two metrics, the MFWG tabled topics that are out of the scope or ability of our working group to resolve, including:

- Building meter aggregation limitations affect data availability for whole building reporting and benchmarking in the market segment ESA CAM targets and more broadly across the multifamily housing market.
- The timing of the Low Income Needs Assessment and related potential study are somewhat incongruent with the ESA program application cycle and may require intervention by Energy

Division in order to make use of their findings in time for the program applications due in June 2019.

- Energy burden might be a high-value metric for understanding the efficacy of initiatives like ESA CAM; however, the methodology and application of such a metric, especially for sets of measures like those included for multifamily common areas, are difficult to quantify.

Metrics not immediately selected by the MFWG for further research

Through discussion among the working group members, two ideas about metrics arose that were not taken up by the group and proposed for adoption in 2019. These are documented here for potential future discussion within the MFWG.

- "Health, comfort, and safety" are viewed by some members of the working group as inherently difficult to quantify, measure, and report given the types of measures included in the current ESA CAM initiative. The working group requested that additional guidance be defined by the CPUC and other state agencies like the Department of Public Health in order to continue to develop the working group's knowledge and ability to design a metric that is usable for improving program design over time. Separately, D. 16-11-022 mandated a program cycle Low Income Needs Assessment study, which is expected to be completed by the end of 2019. A review of key findings from this study may also serve to guide this discussion.

- Participants of ESA CAM (owners) and the end-users (tenants) may view and value health, comfort, and safety benefits differently. The working group notes that in instances where CAM is delivered at the same time as in-unit upgrades, feedback from both owners and tenants may provide a more holistic set of insights about health, comfort, and safety of ESAP overall. Although this is a concern, but the MFWG participants are in discussion with the program implementers about the critical need to have program feedback from the program Single-Point of Contact, program implementers, property owners and affected tenants. We are expecting the IOUs to implement program exit surveys to collect this information.

2018 MFWG Meeting Documentations

All MFWG related documents, including meeting notes and presentation material, can be found at https://pda.energydataweb.com/#/ (i.e., Type "MFWG" in search box). Below, please find a list of meetings dates for both the MFWG Quarterly Meetings as well as Ad Hoc Meetings to address time-sensitive topics:

MFWG Quarterly Meetings	MFWG Ad Hoc Meetings
• MFWG Quarterly Meeting (#3), San Francisco, CA – January 26, 2018	• MFWG Ad Hoc Meeting (#5), Webinar, 1/10/2018. Topic: Discuss ESA MF CAM Initiative Filing and program design options
• MFWG Quarterly Meeting (#4), San Diego, CA – April 26, 2018	• MFWG Ad Hoc Meeting (#6), Webinar, 5/9/2018. Topic: Discuss possible CARE expansion
• MFWG Quarterly Meeting (#5), Chino, CA – July 26, 2018	• MFWG Ad Hoc Meeting (#7), Webinar, 9/7/2018 Topic: Analysis of re-syndicated projects, coordinate/prepare for 2018 ESA MF CAM Initiative progress report, discuss the need for statement of work for Non-deed restricted MF analysis, need to collect program feedback data.
• MFWG Quarterly Meeting (#6), San Francisco, CA – October 29, 2018	

Upcoming 2019 MFWG Actions

In 2019, MFWG will continue to work on the following items as a group:

- Track and link re-syndicated projects to ESA MF CAM projects,
- Provide inputs to the IOUs Non-Deed Restricted MF property analysis to assess the implications of continued ESA MF CAM Initiative beyond current funding,
- Provide inputs to program feedback data collection efforts for property owners, single-point-of-contact, installation contractors, and program teams,
- Continue assessment of ESA MF CAM Initiative metrics and results,
- Contribute to the 2019 ESA program filing activities.

The MFWG will continue to use its current format of conduct Quarterly Meetings as well as Ad Hoc Meetings to achieve progress and collaborative results.

8 APPENDIX C: MID-CYCLE WORKING GROUP – 2018 ACTIVITY

Mid-Cycle Working Group
Final Recommendations for Specific Tasks Identified in D.16-11-022
2018-June-29

I. Summary

The Mid-Cycle Working Group (Working Group) was directed to make recommendations for specific tasks identified on page 241 of California Public Utilities Commission (Commission or CPUC) Decision (D.) 16-11-022.[1] The Working Group submitted initial recommendations on April 3, 2017. The Mid-Cycle Working Group Interim Report was submitted on March 19, 2018, providing the Working Group's 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 Decision D.16-11-022, as modified by D.17-12-009 at page 245. These changes were adopted in Administrative Law Judge Colbert's Ruling on May 8, 2018.

The Mid-Cycle Working Group met on March 27, 2018 at Pacific Energy Center, San Francisco.

This document constitutes the final recommendations of the Mid-Cycle Working Group on the remaining three deliverables.

II. Deliverables

1) Provide recommendations on the adoption of on-line data reporting systems (ODRS) for the ESA Program to help the investor-owned utilities (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.

2) Making recommendations for the household retreatment prioritization models, implementation and outreach strategies, and other aspects of the ESA Program.

[1] California Public Utilities Commission, Decision on Large Investor Owned Utilities' California Alternate Rates for Energy (CARE) and Energy Savings Assistance (ESA) Program Applications, issued November 21, 2016. D.16-11-022 was subsequently modified by D.17-12-009. Both are available on the Commission website at this link: http://docs.cpuc.ca.gov/DecisionsSearchForm.aspx.

3) 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 California Alternate Rates for Energy (CARE) and ESA participants in recognition of the increased State goals detailed in SB 350.

III. Final Recommendations

Pacific Gas & Electric Company (PG&E) hereby submits final recommendations in these areas on behalf of the Mid-Cycle Working Group ("Working Group" or "MCWG").

1) Mid-Cycle Working Group Recommendations On Adoption Of An On-Line Data Reporting System

Working Group participants reviewed the Evaluation Report prepared for the IOUs by Emerald Cities Collaborative in July 2016.[2] Following review of the Report, the Working Group concluded that additional research is warranted prior to recommending a preferred on-line data reporting system (ODRS).

The MCWG was tasked to provide recommendations on the adoption of an on-line data reporting system (ODRS) for the Energy Savings Assistance (ESA) Program to help the investor-owned utilities (IOUs) and the Commission to better understand how these systems collect and report workforce data.[3] Specifically, the MCWG was directed to address the following topics in their assessment:[4]

a. The value of adopting ODRS for the ESA Program;

b. The cost and benefits of implementing an ODRS; and

c. Potential administrative burdens to implement ODRS by either contractors or utilities.

The MCWG decided to focus their assessment on a 2016 report, the Emerald Cities Collaborative ("ECC report"), that evaluated the features of two popular ODRS.[5] This report was part of a series of related research efforts administered by the Workforce Education and Training Program.

[2] Emerald Cities Collaborative: Online Data Reporting Systems Evaluation Report, available at this link: Evaluation Report
[3] D.17-12-009, page 245.
[4] D.17-12-009, page 245.
[5] Emerald Cities Collaborative, Online Data Reporting Systems Evaluation Report, July 2016.

a. **The value of adopting ODRS for the ESA Program**

The MCWG reviewed the ECC report, which was an evaluation conducted to identify the key functions and capabilities of two specific ODRS databases. Based on the features and limitations of the systems described in this report, the MCWG determined that the value of using such a system in the ESA program would depend on the data required to be collected, how the collected data would be used, and to whom it would be provided. D.17-12-009 did not provide direction on the content and use of the data; therefore, the MCWG believes it is premature to determine the value of using an ODRS.

An area of concern expressed during the MCWG's discussion regarded the integrity of the data to be collected. The value of the data is only as good as the data provided by the employees and employers, and employers may not know and/or may not be willing to provide certain data. Therefore, MCWG noted potential concerns with data integrity and the impact to the overall value of the data to be collected.

b. **Cost benefits of implementing an ODRS**

The ECC report estimated annual licensing costs of $40,000 to $71,000 per utility for operating the evaluated software packages. It is important to note, however, that these estimates do not include utility or contractor administrative costs and only include limited training and setup costs. The ECC report also identified potential costs associated for increased training, human resources, and legal engagement to support these efforts which could prove to be a significant cost burden to both utilities and contractors. The ECC report specifically states:

> "The full benefits of both systems must be weighed against the implementation and administrative costs and burdens on the users - IOUs and contractors. This assessment was not included in the project scope but areas needed for further investigation are identified throughout the report, including the costs of system design, staffing and management, data quality control and assurances and on-going training. These costs may differ for each utility as well as the contractors with different firm experience and capacities."[6]

MCWG members representing ESA Program contractors also voiced significant concerns regarding the cost impacts of implementation to contractors, which could potentially be significant given the sensitive nature of the data being collected and on-going training needs of employees. With many of the ESA Program contractors being small and diverse business

[6] Emerald Cities Collaborative: Online Data Reporting Systems Evaluation Report, July 2016.

owners, the implementation of such a system could significantly impact their ability to provide services for the ESA Program.

The MCWG was unable to determine the complete costs and benefits related to the implementation of an ODRS system, as questions surrounding the long-term management of the data remain unanswered. With so many concerns and unknowns, the undertaking to identify all the cost implications and potential benefits related to implementation of an ODRS is significant. Therefore, a thorough cost benefit analysis was not completed by the MCWG.

c. Administrative burdens to implement ODRS

The MCWG discussed significant concerns regarding the confidential nature of the data being requested. Data breaches are of great concern to everyone given so many recent incidents occurring to large organizations with seemingly sound security practices. The potential data collected by an ODRS includes wage information, race, ethnicity, gender and socio-economic status, amongst many other things. With the potential of the data breaches, the MCWG is concerned with implementing a system where highly confidential and sensitive data is being maintained without a clear risk assessment being completed.

Recommendation

Based on the research conducted and MCWG participant discussions, the MCWG does not recommend the implementation of ODRS for the ESA Program for the reasons identified above.

2) Household Retreatment Prioritization Models, Implementation and Outreach Strategies, and other aspects of the ESA Program

Working Group participants updated their ESA household retreatment prioritization models presented to the MCWG in April 2017. Following presentation and review of these initial proposals, the Working Group found that significant variations in retreatment prioritization models relate to best practices within each service territory, and the specific measures offered by each utility. Rather than developing a new retreatment prioritization model, there was consensus within the Working Group for the utilities to continue to prioritize ESA retreatments following their current models (summarized below), document best practices and challenges, and update their retreatment prioritization proposals as needed in their Mid-Cycle Update Advice Letters, due in July 2018.

a. Southern California Edison Company (SCE)

Based on lessons learned from ESA implementation in the Aliso Canyon affected area, SCE in their initial recommendation proposed to prioritize retreatment of households based on measure specific feasibility guidelines. SCE would utilize its Energy Management Assistance Partnership System (EMAPs) database to target customers previously enrolled in the program, who are eligible for measures that were unavailable during their original enrollment.

On February 12, 2018, SCE's Advice Letter 3743-E provided plans to address the increased homes treated goals and savings targets. SCE's plan includes continuation of the Marketing, Education, and Outreach plan for the 2017-2020 ESA Program cycle that provides situational analysis of SCE's low income audience, including customer insights and barriers to participation, as well as a marketing plan outlining objectives, strategies, tactics, and metrics to meet the total homes treated goal. Other low income marketing activities incorporate lessons learned from ESA implementation in the Aliso Canyon affected area to prioritize retreatment of households. For example, SCE utilized its program database (Energy Management Assistance Partnership System) to identify customers previously enrolled in the program that may be eligible for measures based on changes to the ESA Program. Additionally, targeted customers with a refrigerator manufactured between 1999- 2000, are provided the opportunity to replace the refrigerator and potentially receive other measures, i.e. LEDs and/or advanced power strips.

b. Pacific Gas and Electric Company (PG&E)

In their initial recommendation, PG&E proposed targeting homes treated before 2013, focusing on CARE high energy users, homes treated before 2008, and homes eligible for new measures added to the program between 2001 and 2012. PG&E would utilize its database to provide contractors with flags identifying customers eligible for retreatment as well as zip codes with low program enrollment.

Since then, PG&E designed a retreatment model (otherwise known as the "Go-Back" model) and is actively socializing the model with its program implementers and their subcontractors. This Go-Back model was launched in May 2017. PG&E's current ESA Program prioritizes the treatment of ESA 2020 customers. Re-treatment of premises is focused on specific customer characteristics, listed below. As fewer 2020 customers remain to be treated, PG&E will look to enhance its Go Back offer, modifying the retreatment priority accordingly.

PG&E defines retreatment eligibility as:

1. Households that participated before January 1, 2013 (including customers that may have moved into a home that participated before January 1, 2013). This includes both:
    a) Different occupants of the same home AND
    b) Same occupants of a different home
2. Each premise should only receive one Go Back retreatment during the 2017-2020 ESA Program cycle unless directed by PG&E; treating a household more than once is discouraged.

PG&E's goal is to retreat CARE High Energy Use (HUE) customers to decrease their energy use. PG&E recommends that subcontractors pursue the following types of customers for retreatment (although they are not limited this approach):

1. High energy users (gas/electric), and potentially zip codes where participation rates are below average.
2. Homes treated before 2008, as these have the greatest potential to install the most feasible measures due to the following:
    a) More than twenty measures were added to the ESA Program between 2001 and 2012.
    b) New codes and standards have been introduced, which directly impact energy or water savings.
    c) Measures installed may have surpassed their useful life and are now eligible for replacement.

PG&E currently provides marketing collateral that subcontractors may leverage for the Go Back program during their customer acquisition efforts. PG&E provides retreatment program training via webinars and in-person meetings with subcontractors as well as written guidance and existing marketing collateral. Additionally, PG&E's program database identifies customers who have previously participated and are considered CARE High Energy Use. The database also tracks these customers' willingness and eligibility to participate. This data is shared with subcontractors to aid their retreatment efforts and allow parties to track customer insights and issues. PG&E monitors subcontractors' progress and needs as they begin to serve this segment to continually improve outreach resources and support to meet ESA goals.

Future modifications to PG&E's Go Back Program will be determined by eligibility guidelines based on attainment of ESA 2020 Goals, opportunity to enhance energy savings, and areas to improve program efficiency via smart meter data analysis in the future.

b. Southern California Gas Company (SoCalGas)

In their initial recommendation, SoCalGas proposed to target homes in areas with low program enrollment, and prioritized homes treated prior to 2009 based on likelihood of feasibility for recently introduced measures.

Pursuant to Resolution G-3532, SoCalGas filed a Tier 2 Advice Letter outlining its Clear Plan to treat the remaining untreated population by 2020. In the Clear Plan, SoCalGas proposed to adjust its operating parameters to gear contractor efforts towards first-time treatments. Although SoCalGas will continue to prioritize homes treated prior to 2009 in its retreatment strategy, it will place a greater emphasis on first time treatments by making the necessary program operating, marketing and outreach adjustments in an effort to meet the 2020 goal.

c. San Diego Gas & Electric Company (SDG&E)

In their initial recommendation, 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.

Since the initial implementation of the prioritization model, SDG&E has made a modification to the retreatment process to improve opportunities for contractors and customers to receive ESA Program services through retreatment efforts. SDG&E's prioritization model continues to take into consideration usage and measure feasibility, however premises treated prior to 2009 are now also eligible for retreatment without contractors needing to request approval prior to retreatment.

Prior to this change, contractors were provided specific targeting lists and potential retreatments not on the list required utility approval prior to retreatment. SDG&E staff would review the measure installation history to determine measure feasibility and provide approval as appropriate. The administrative burden became too great for both contractors and SDG&E. Given additional measures were added in 2009, SDG&E determined that homes treated prior to 2009 would benefit from the new measures offered through the ESA Program beginning in that program cycle. The change has streamlined contractor retreatment efforts and reduced administrative burdens. SDG&E continues to review all retreatments not within the current prioritization model and approves retreatment on a case-by-case basis.

3) Deployment of Tools to Enable Greater Energy Efficiency and Demand Response Participation in Recognition of the Increased State Goals Detailed in Senate Bill (SB) 350

Working Group participants reviewed current utility Demand Response offerings, and discussed how to integrate these offerings into the ESA Program. PG&E and SCE proposed households served with air conditioning (AC) systems and AC replacements would be eligible for Demand Response programs such as AC Switch and AC Cycling respectively. SDG&E proposes to implement Programmable Communicating Thermostat (PCT) through its approved pilot program. The Energy Efficiency Council (EEC) recommended including Demand Response education as part of utility enhanced energy education modules. TELACU agreed with EEC's recommendation and added that enrolled households should receive an incentive for enrolling in Demand Response programs with contractors. IOU offerings are described below. Parties may provide additional recommendations for best practices to enable greater Energy Efficiency and Demand Response participation in response to the Mid Cycle Update Advice Letters to be filed by the IOUs in July 2018.

a. Southern California Edison Company (SCE)

On March 1, 2018, SCE filed Advice Letter 3753-E, which provides details about SCE's Programmable Communicating Thermostat (PCT) Time of Use (TOU) Pilot and its respective implementation plan and coordination with default TOU rollout effort. The pilot will explore and evaluate if using a PCT paired with a mobile phone application will affect the behavior of low income, high energy usage customers in hot climate zones (Climate Zones 14 and 15) while on the TOU rate. In addition, SCE will be proposing to add smart thermostats to the ESA Program measure portfolio in the Mid-cycle Update Advice Letter.

The introduction of this measure provides an opportunity to enhance energy education and promote participation in Demand Response programs. Additionally, SCE refers ESA customers for participation in SCE's Summer Discount Plan when appropriate.

b. Pacific Gas and Electric Company (PG&E)

Measures offered through PG&E's ESA program utilize best available current technology to leverage participation in customer facing energy management programs. While most electric and education measures for ESA are consistent with Assembly Bill (AB) 327, key measures are those reducing kWh that would specifically support customers impacted by

tier collapse and measures supporting peak period reduction that would specifically support Time-of-Use (TOU) customers are key.

In compliance with D.16-11-022 (p.99), the following measure technology options reduce energy use (kWh), reduce demand (kW) during peak periods, or enable participation in demand response and/or alternative tariffs that are eligible for energy education requirements and consistent with AB 327:

- Refrigerators
- Light Emitting Diode (LED) Lamps
- Exterior Hardwired Lights
- Interior Hardwire Lights
- Attic Insulation
- Evaporative Cooler Replacement
- Room Air Conditioner (AC) Replacement
- AC Tune-up

ESA households with central AC or heat pumps who receive electric service from PG&E are potential candidates for PG&E demand response programs. PG&E's Smart AC program offers a load control receiver, also known as an AC switch, which enables seamless participation in PG&E's SmartRate Program.

PG&E SmartRate program is available to all ESA households receiving electric service from PG&E.

PG&E's Smart Thermostat/Programmable Communicating Thermostat (PCT) Time of Use (TOU) Pilot Advice 5242-E became effective April 27, 2018. Additionally, PG&E is exploring the adding smart thermostats to ESA in its mid-cycle update advice letter.

As PG&E demand response programs continue to evolve, PG&E's ESA Program will reevaluate new program and technology offerings and how to best leverage these offerings to reduce the energy burden of CARE customers.

c. Southern California Gas Company (SoCalGas)

In the Clear Plan, SoCalGas proposed to implement a smart thermostat pilot which could provide for additional participation by low income customers in SoCalGas' Winter Demand Response program. On May 18, 2018, the Commission issued a disposition letter authorizing SoCalGas to pilot the Smart Thermostat measure consistent with the three electric utilities per D 17.12-009.

d. San Diego Gas & Electric Company (SDG&E)

Since the initial MCWG recommendations were developed, SDG&E filed Advice Letter 3197-E/2655-G, requesting Commission approval to implement the PCT pilot directed in D.17-12-009. On March 27, 2018, the Commission's Energy Division suspended the Advice Letter beginning April 1, 2018 which caused the planning and the implementation of the pilot to be placed on hold. Effective May 3, 2018, the Commission approved SDG&E's PCT Advice Letter with a modification to include a statewide evaluator. With this modification, the IOUs on May 15, 2018 requested to extend the implementation from the summer of 2018 to the fall of 2018. IOUs are currently awaiting Commission authorization on the extension request. SDG&E intends to include Smart Thermostats/PCT as part of the measure mix for the ESA Program and plans to request approval as part of the mid-cycle filing on July 16, 2018. Additionally, SDG&E has incorporated Demand Response, Rate Reform, and My Account information as part of the In-Home Education provided to customers receiving ESA Program treatment.

IV. Mid Cycle Working Group Participant Organizations

The following organizations participated in the MCWG meeting on March 27, 2018 and in follow up discussions to provide these final recommendations.

- CPUC Energy Division
- Southern California Edison Company
- Pacific Gas and Electric Company
- Southern California Gas Company
- San Diego Gas & Electric Company
- Energy Efficiency Council
- TELACU
- Proteus

9 APPENDIX D – SAMPLE COLLATERAL MATERIALS – CARE PROGRAM

Appendix D – Sample English Print Ads – CARE PROGRAM

Appendix D - Sample Spanish Print Ads – CARE PROGRAM

Appendix D - Sample Email

Based on your 2017 energy use, you could have had an annual savings of approximately $354*

2017 WITHOUT discount* **2017 WITH discount***

Based on kilowatt hours for 2017

GET QUALIFIED

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

To learn more, connect at sdge.com/care, or call 1-877-646-5525

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.

Appendix D - Sample Bill Insert – March 2018 – English

If you're enrolled in a public assistance program, or on a limited income, we want to help. You may qualify for a monthly bill discount of 30% or even more. You could also qualify for no-cost energy-efficient home improvements.

To see if you qualify, visit *sdge.com/assistance*

SDGE

A Sempra Energy utility®

High energy use could result in discontinuation of the bill discount.
These programs are funded by utility customers and administered by San Diego Gas & Electric® under the auspices of the California Public Utilities Commission. Eligibility requirements and certain terms and conditions apply. SDG&E makes no representations as to the safety, reliability and/or efficiency of any such upgrades. SDG&E makes no warranty, whether express or implied, including warranty of merchantability or fitness for any particular purpose, use or application of selected goods and services.

Printed on recycled paper.
C-1803 S1810008 0318 861.8M

Appendix D - Sample Bill Insert – March 2018 – Spanish

Appendix D - Sample Informational Brochure

Contact information

For more information on our programs and services, including income qualifications and referrals to community agencies, contact us at **1-800-411-7343**. TDD/TTY **1-877-889-7343** or voice (emergencies): **1-800-611-7343**. You can also visit our website at *sdge.com/assistance*.

P.O. Box 129831 | San Diego, CA 92112-9831
1-800-411-7343 | Connect at **sdge.com**

Extra help available if you need it

Appendix D - Sample Informational Brochure

Support available when you need it

SDGE
A Sempra Energy utility*

Help is just a click or phone call away.

Helping you save

Whether you're interested in an easier way to pay your SDG&E® bill, conserve energy or learn about a few specialized services, we can help.

Save money & energy

Save 30% or more on your monthly bill

With the California Alternate Rates for Energy (CARE)* program you can save every month on your energy bill. Eligibility is based on participation in certain public assistance programs or current household income and the number of people living in your home. To apply, visit ***sdge.com/care***.

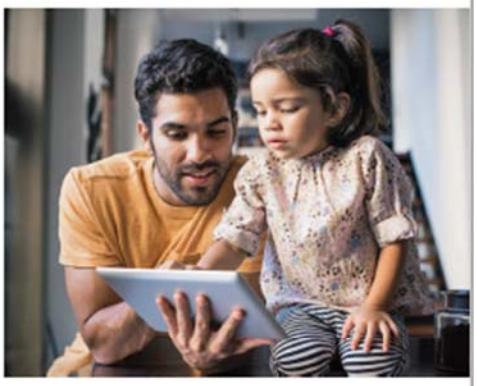
Lower electric rates

If you do not qualify for CARE, you may be eligible for the Family Electric Rate Assistance (FERA) program. FERA provides income-qualified households of three or more with a reduced electric rate that can save 12% every month on your bill. To apply, visit ***sdge.com/fera***.

Lower energy costs for those with medical needs

The Medical Baseline Allowance Program has helped over 50,000 people, who have a qualifying medical need or medical device, lower their energy costs. Contact us if someone in your household has:

- A qualifying medical need such as a compromised immune system or life-threatening illness.
- Any condition where additional heating and air conditioning is medically necessary to sustain a person's life
- One of the qualifying devices listed on the application



Please note that household income is not a factor for qualifying, but a doctor's certification on the application is required. To apply call **1-800-411-7343** or connect at ***sdge.com/medicalbaseline***.

Free services and appliances for your home

Energy Savings Assistance Program**

If you qualify for the Energy Savings Assistance Program** we'll provide free energy-saving home improvements to your apartment, condo, house or mobile home. You may receive free lighting, weather stripping, attic insulation and even select appliances.

Please note that renters need written permission from landlords to receive these services. Call **1-866-597-0597** or visit ***sdge.com/esap*** to apply.

Cash back on energy-saving products and projects

We're committed to creating ways to help you save energy and money. We offer cash back for qualifying purchases and upgrades you make to your home.

*High energy use may result in removal from the program.
**SDG&E does not warrant goods and services provided to customers. Homes previously participating in the program may be excluded from additional program participation.

continued on back ›

10 APPENDIX E: 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

San Diego Gas Electric Company

Energy Savings Assistance Program
And
California Alternate Rates for Energy Program

SDG&E 2018 Summary Highlights

ESA Program

2018 Energy Savings Assistance Program Summary			
2018	**Authorized / Planning Assumptions**	**Actual**	**%**
Budget	$31,631,921	$22,780,528	72%
Funded from 2009-2016 Unspent Funds	$2,112,302	$115,654	5%
Summary Homes Treated	21,332	21,387	100%
Summary kWh Saved	6,560,000	5,514,622	84%
Summary kW Demand Reduced	2,148	3,627	169%
Summary Therms Saved	380,000	178,048	47%
First Touches Homes Treated *	11,667	7,785	67%
- kWh Saved	N/A	2,110,347	
- kW Demand Reduced	N/A	939	
- Therms Saved	N/A	33,416	
Go-Backs/Retreated Homes *	9,665	13,602	141%
- kWh Saved	N/A	3,404,275	
- kW Demand Reduced	N/A	2,689	
- Therms Saved	N/A	144,632	

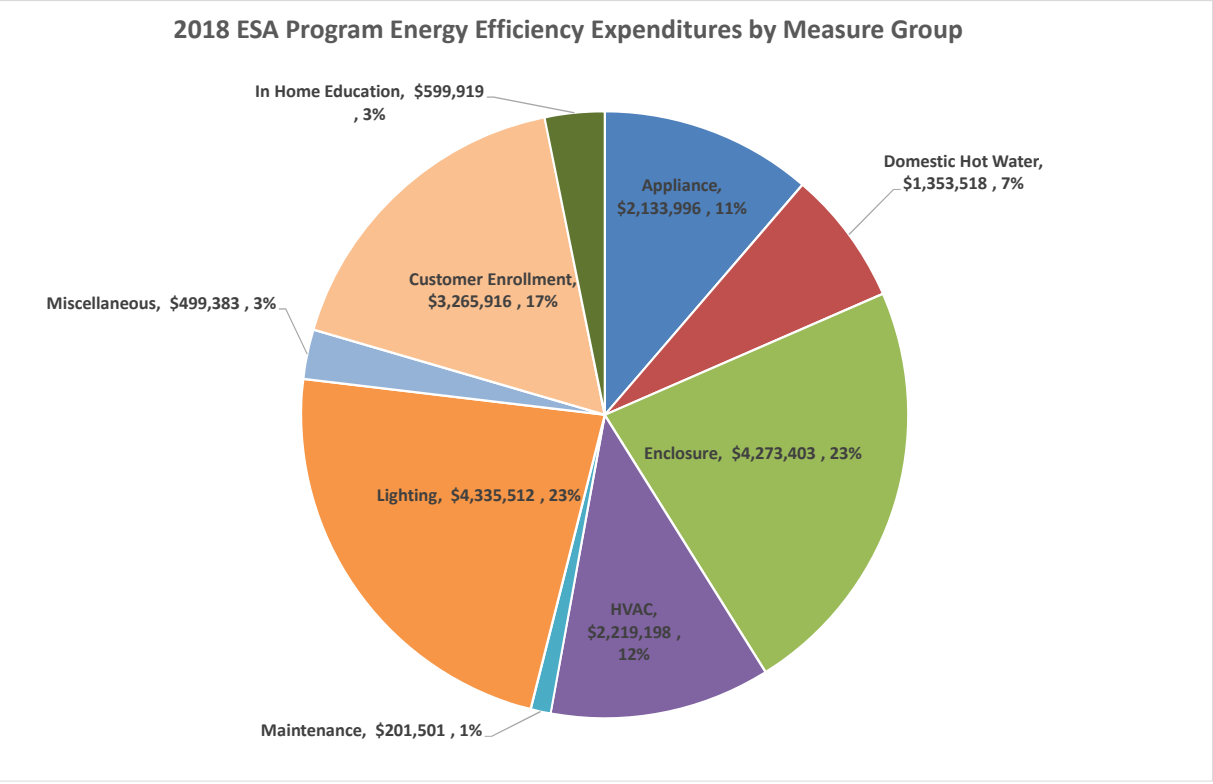
* SDG&E's authorized forecast included the total number of homes treated for first touches versus go-backs/retreatments; measures and savings were not included in the forecast.

Note: The authorized budget and values shown for planning assumptions are from SDG&E Advice Letter 3065-E-A/2568-G-A approved by Commission Resolution E-4884 on December 14, 2017 and SDG&E Advice Letter 3250-E/2688-G approved by Commission on December 27, 2018.

CARE Program

2018 CARE Program Summary			
2018	**Authorized Budget**	**Actual**	**%**
Administrative Expenses	$ 7,281,672	$ 5,852,015	80%
Subsidies	$ 73,102,151	$ 126,165,599	173%
Service Establishment Charge	$ -	$ -	n/a
Total Program Costs and Discounts	**$ 80,383,823**	**$ 132,017,614**	164%
2018 CARE New Enrollments	**Automatically Enrolled via Data Sharing, ESA Participation, etc**	**Self Certified as Categorically Eligible**	**Self Certified as Income Eligible**
Method	7,619	33,175	38,088
2018 CARE Penetration	**Estimated Eligible Participants**	**Participants**	**Penetration Rate**
Total Enrolled	321,323	297,103	92%

Data in pie below includes costs for measure end use reflected in ESA Tables 1 and 1A.



	A	B	C	D	E	F	G	H	I	J
1	**SDG&E PY 2018 Energy Savings Assistance Program Annual Report ESAP Table 1 ESAP Overall Program Expenses**									
2		**2018 Authorized Budget[1] [2]**			**2018 Annual Expenses**			**% of Budget Spent**		
3	**ESA Program:**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**
4	**Energy Efficiency**									
5	Appliances	$ 3,555,699	$ 1,331,212	$ 4,886,911	$ 2,061,712	$ 72,284	$ 2,133,996	58%	5%	44%
6	Domestic Hot Water	$ 63,721	$ 2,060,311	$ 2,124,032	$ 40,606	$ 1,312,912	$ 1,353,518	64%	64%	64%
7	Enclosure	$ 1,917,114	$ 2,966,933	$ 4,884,047	$ 1,837,563	$ 2,435,841	$ 4,273,404	96%	82%	87%
8	HVAC	$ 424,438	$ 3,701,892	$ 4,126,330	$ 194,261	$ 2,024,937	$ 2,219,198	46%	55%	54%
9	Maintenance	$ 13,491	$ 556,995	$ 570,486	$ -	$ 201,501	$ 201,501	0%	36%	35%
10	Lighting	$ 2,977,421	$ -	$ 2,977,421	$ 4,335,512	$ -	$ 4,335,512	146%	0%	146%
11	Miscellaneous	$ 1,576,005	$ -	$ 1,576,005	$ 499,383	$ -	$ 499,383	32%	0%	32%
12	Customer Enrollment	$ 2,150,145	$ 2,150,145	$ 4,300,290	$ 1,632,958	$ 1,632,958	$ 3,265,916	76%	76%	76%
13	In Home Education	$ 330,757	$ 330,757	$ 661,513	$ 282,213	$ 282,212	$ 564,425	85%	85%	85%
14					$ -	$ -				
15					$ -	$ -				
16	**Energy Efficiency TOTAL[3]**	**$ 13,008,791**	**$ 13,098,244**	**$ 26,107,035**	**$ 10,884,208**	**$ 7,962,644**	**$ 18,846,851**	**84%**	**61%**	**72%**
17										
18	Training Center	$ 239,417	$ 239,417	$ 478,834	$ -	$ -	$ -	0%	0%	0%
19	Inspections	$ 86,707	$ 86,707	$ 173,414	$ 59,226	$ 59,226	$ 118,451	68%	68%	68%
20	Marketing and Outreach	$ 600,000	$ 600,000	$ 1,200,000	$ 584,810	$ 584,810	$ 1,169,620	97%	97%	97%
21	Statewide Marketing Education and Outreach	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
22	Measurement and Evaluation Studies[4]	$ 17,083	$ 17,083	$ 34,166	$ 21,455	$ 21,456	$ 42,911	126%	126%	126%
23	Regulatory Compliance	$ 136,982	$ 136,982	$ 273,964	$ 110,607	$ 110,607	$ 221,215	81%	81%	81%
24	General Administration	$ 1,315,457	$ 1,315,457	$ 2,630,913	$ 1,183,369	$ 1,183,370	$ 2,366,739	90%	90%	90%
25	CPUC Energy Division	$ 22,950	$ 22,950	$ 45,900	$ 7,370	$ 7,370	$ 14,741	32%	32%	32%
26	Reallocation (ME&O budget reduced from $1.2M)	$ 343,848	$ 343,848	$ 687,695	$ -	$ -	$ -	0%	0%	0%
27										
28	**TOTAL PROGRAM COSTS**	**$ 15,771,234**	**$ 15,860,687**	**$ 31,631,921**	**$ 12,851,046**	**$ 9,929,482**	**$ 22,780,528**	**81%**	**63%**	**72%**
29	**Funded Outside of ESA Program Budget**									
30	Indirect Costs				$ 492,362	$ 478,309	$ 970,671			
31	NGAT Costs		$ 305,000	**$ 305,000**		$ 174,180	$ 174,180		57%	57%
32										
33	[1] Reflects authorized budget in SDG&E Advice Letter 3065-E-A/2568-G-A approved by Commission Resolution E-4884 on December 14, 2017 and SDG&E Advice Letter 3250-E/2688-G approved by Commission on December 27, 2018.									
34	[2] The authorized budget does not include shifted funds from previous year and/or program cycle, and/or 2009-2016 program years. Shifted funds are reflected in ESA Table 12.									
35	[3] Adjusted to reflect true 2018 contractor activity, net of accruals.									
36	[4] Adjusted to reflect true NEB's Study activity, net of co-funding reimbursements, billed in 2019.									

	A	B	C	D	E	F	G	H	I	J
1	**SDG&E PY 2018 Energy Savings Assistance Program Annual Report ESAP Table 1A Expenses Funded from 2009-2016 Unspent Program Funds**									
2		**2018 Authorized Budget[1] [2]**			**2018 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	$ 415,000	$ 415,000	$ 830,000	$ 30,636	$ 30,637	$ 61,273	7%	7%	7%
7	In Home Education	$ 168,628	$ 168,628	$ 337,256	$ 17,747	$ 17,747	$ 35,494	11%	11%	11%
8	Leveraging - CSD	$ 241,216	$ 241,216	$ 482,431	$ -	$ -	$ -	0%	0%	0%
9	Pilot	$ 150,000	$ 150,000	$ 300,000	$ 5,538	$ 5,538	$ 11,076	4%	4%	4%
10	Measurement and Evaluation Studies	$ 30,625	$ 30,625	$ 61,250	$ -	$ -	$ -	0%	0%	0%
11	Regulatory Compliance	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
12	General Administration	$ 50,683	$ 50,683	$ 101,365	$ 3,906	$ 3,906	$ 7,811	8%	8%	8%
13										
14	**TOTAL UNSPENT PROGRAM COSTS**	**$ 1,056,151**	**$ 1,056,151**	**$ 2,112,302**	**$ 57,827**	**$ 57,827**	**$ 115,654**	**5%**	**5%**	**5%**
15										
16										
17	[1] Reflects authorized budget in SDG&E Advice Letter 3065-E-A/2568-G-A approved by Commission Resolution E-4884 on December 14, 2017 and SDG&E Advice									
18	[2] D.16-11-022 specifically directed funding for new initiatives to come from unspent 2009-2016 ESA Program funds, which is reaffirmed in Advice Letter SDG&E 3250-E/2688-G.									
19										
20										

SDG&E 2018 Energy Savings Assistance Program Annual Report

ESAP Table 2

ESAP Expenses and Energy Savings by Measures Installed

		ESA Program (Summary)Total						ESA Program (First Touch Homes Treated)							ESA Program (Re-Treated Homes/Go Backs)							ESA Program (Aliso Canyon - SCG & SCE) [6]						
			Year-To-Date Completed & Expensed Installation						Year-To-Date Completed & Expensed Installation							Year-To-Date Completed & Expensed Installation							Year-To-Date Completed & Expensed Installation						
	Measures	Units	Quantity Installed	kWh [4] (Annual)	kW [4] (Annual)	Therms [4] (Annual)	Expenses ($)	% of Expenditure	Units	Quantity Installed	kWh [4] (Annual)	kW [4] (Annual)	Therms [4] (Annual)	Expenses ($)	% of Expenditure	Units	Quantity Installed	kWh [4] (Annual)	kW [4] (Annual)	Therms [4] (Annual)	Expenses ($)	% of Expenditure	Units	Quantity Installed	kWh [4] (Annual)	kW [4] (Annual)	Therms [4] (Annual)	Expenses ($)	% of Expenditure
	Appliances		(K+S)	(L+T)	(M+U)	(N+V)	(O+W)																					
9	High Efficiency Clothes Washer	Each	313	1,106	0	4,821	$ 238,847	1.3%	Each	79	369	0	1,205	$ 60,603	0.3%	Each	234	737	0	3,616	$ 178,244	0.9%	Each	-	-	-	-	$ -	0.0%
10	Refrigerators	Each	995	614,733	73	-	$ 848,432	4.5%	Each	337	208,739	25	-	$ 301,144	1.6%	Each	658	405,994	48	-	$ 547,287	2.9%	Each	-	-	-	-	$ -	0.0%
11	Microwaves [5]	Each	9,694	221,312	44	148,962	$ 1,047,932	5.5%	Each	2,234	64,724	13	28,873	$ 243,151	1.3%	Each	7,460	156,588	31	120,089	$ 804,780	4.3%	Each	-	-	-	-	$ -	0.0%
12	**Domestic Hot Water**																											
13	Water Heater Blanket	Home	219	62	0	92	$ 12,738	0.1%	Home	63	39	0	24	$ 3,631	0.0%	Home	156	23	0	68	$ 9,107	0.0%	Home	-	-	-	-	$ -	0.0%
14	Low Flow Shower Head	Home	7,336	967	0	5,818	$ 460,909	2.4%	Home	1,660	399	0	1,358	$ 122,077	0.6%	Home	5,676	568	0	4,461	$ 338,831	1.8%	Home	-	-	-	-	$ -	0.0%
15	Water Heater Pipe Insulation	Home	243	2	-	6	$ 7,242	0.0%	Home	169	2	-	4	$ 5,322	0.0%	Home	74	-	-	2	$ 1,921	0.0%	Home	-	-	-	-	$ -	0.0%
16	Faucet Aerator	Home	13,325	994	0	7,248	$ 117,255	0.6%	Home	3,337	430	0	1,968	$ 29,910	0.2%	Home	9,988	564	0	5,280	$ 87,345	0.5%	Home	-	-	-	-	$ -	0.0%
17	Water Heater Repair/Replacement	Each	768	-	-	5,222	$ 525,267	2.8%	Each	248	-	-	1,686	$ 163,110	0.9%	Each	520	-	-	3,536	$ 362,157	1.9%	Each	-	-	-	-	$ -	0.0%
18	Thermostatic Shower Valve	Each	3,760	9,150	1	7,477	$ 235,316	1.2%	Each	1,276	3,847	0	2,408	$ 79,815	0.4%	Each	2,484	5,303	1	5,069	$ 155,501	0.8%	Each	-	-	-	-	$ -	0.0%
19	New - Combined Showerhead/TSV	Each	2	-	-	19	$ 137	0.0%	Each	2	-	-	19	$ 137	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
20	New - Heat Pump Water Heater	Each	-	-	-	-	$ -	0.0%	Each						0.0%	Each						0.0%	Each	-	-	-	-	$ -	0.0%
21	New - Tub Diverter/ Tub Spout	Each	9	65	0	16	$ 1,103	0.0%	Each	6	-	-	12	$ 802	0.0%	Each	3	65	0	4	$ 301	0.0%	Each	-	-	-	-	$ -	0.0%
22	New - Thermostat-controlled Shower Valve	Each	-	-	-	-	$ -	0.0%	Each						0.0%	Each						0.0%	Each	-	-	-	-	$ -	0.0%
23	**Enclosure**																											
24	Air Sealing / Envelope [1]	Home	8,954	61,081	13	17,200	$ 4,175,969	22.1%	Home	2,336	25,318	5	5,454	$ 1,133,546	6.0%	Home	6,618	35,763	8	11,746	$ 3,042,422	16.1%	Home	-	-	-	-	$ -	0.0%
25	Caulking	Home	-	-	-	-	$ -	0.0%	Home						0.0%	Home						0.0%	Home	-	-	-	-	-	0.0%
26	Attic Insulation	Home	257	2,725	1	6,355	$ 308,274	1.6%	Home	82	1,078	0	2,039	$ 107,611	0.6%	Home	175	1,646	0	4,316	$ 200,663	1.1%	Home	-	-	-	-	$ -	0.0%
27	**HVAC**																											
28	FAU Standing Pilot Conversion	Each	1	-	-	15	$ 324	0.0%	Each	-	-	-	-	$ -	0.0%	Each	1	-	-	15	$ 324	0.0%	Each	-	-	-	-	$ -	0.0%
29	Furnace Repair/Replacement	Each	2,553	-	-	-	$ 1,768,740	9.4%	Each	729	-	-	-	$ 623,749	3.3%	Each	1,824	-	-	-	$ 1,144,991	6.1%	Each	-	-	-	-	$ -	0.0%
30	Room A/C Replacement	Each	192	2,010	0	-	$ 194,261	1.0%	Each	23	303	0	-	$ 21,613	0.1%	Each	169	1,708	0	-	$ 172,648	0.9%	Each	-	-	-	-	$ -	0.0%
31	Central A/C replacement	Each	-	-	-	-	$ -	0.0%	Each						0.0%	Each						0.0%	Each	-	-	-	-	$ -	0.0%
32	Heat Pump Replacement	Each	-	-	-	-	$ -	0.0%	Each						0.0%	Each						0.0%	Each	-	-	-	-	$ -	0.0%
33	Evaporative Cooler (Replacement)	Each	-	-	-	-	$ -	0.0%	Each						0.0%	Each						0.0%	Each	-	-	-	-	$ -	0.0%
34	Evaporative Cooler (Installation)	Each	-	-	-	-	$ -	0.0%	Each						0.0%	Each						0.0%	Each	-	-	-	-	$ -	0.0%
35	Duct Testing and Sealing	Home	154	1,170	0	2,210	$ 35,260	0.2%	Home	55	947	0	810	$ 12,123	0.1%	Home	99	223	0	1,399	$ 23,137	0.1%	Home	-	-	-	-	$ -	0.0%
36	New - Energy Efficient Fan Control	Home	-	-	-	-	$ -	0.0%	Home						0.0%	Home						0.0%	Home	-	-	-	-	$ -	0.0%
37	New - Prescriptive Duct Sealing	Home	-	-	-	-	$ -	0.0%	Home						0.0%	Home						0.0%	Home	-	-	-	-	$ -	0.0%
38	New - High Efficiency Forced Air Unit (HE FAU)	Home	-	-	-	-	$ -	0.0%	Home						0.0%	Home						0.0%	Home	-	-	-	-	$ -	0.0%
39	New - A/C Time Delay	Home	-	-	-	-	$ -	0.0%	Home						0.0%	Home						0.0%	Home	-	-	-	-	$ -	0.0%
40	**Maintenance**																											
41	Furnace Clean and Tune	Home	2,682	-	-	34,583	$ 206,504	1.1%	Home	755	-	-	9,742	$ 58,198	0.3%	Home	1,927	-	-	24,841	$ 148,306	0.8%	Home	-	-	-	-	$ -	0.0%
42	Central A/C Tune up	Home	-	-	-	-	$ -	0.0%	Home		-	-	-	$ -	0.0%	Home						0.0%	Home	-	-	-	-	$ -	0.0%
43	**Lighting**																											
44	Compact Fluorescent Lights (CFL)	Each	-	-	-	-	$ -	0.0%	Each						0.0%	Each						0.0%	Each	-	-	-	-	$ -	0.0%
45	Interior Hard wired CFL fixtures	Each	9,429	642,775	1,188	(226)	$ 751,988	4.0%	Each	1,947	132,727	245	(43)	$ 153,865	0.8%	Each	7,482	510,048	943	(183)	$ 598,123	3.2%	Each	-	-	-	-	$ -	0.0%
46	Exterior Hard wired CFL fixtures	Each	2,819	292,246	234	-	$ 194,546	1.0%	Each	920	95,376	76	-	$ 63,480	0.3%	Each	1,899	196,869	158	-	$ 131,066	0.7%	Each	-	-	-	-	$ -	0.0%
47	Torchiere	Each	14,330	976,876	1,806	(22,955)	$ 1,284,377	6.8%	Each	3,479	237,163	438	(5,050)	$ 311,823	1.7%	Each	10,851	739,713	1,367	(17,906)	$ 972,554	5.2%	Each	-	-	-	-	$ -	0.0%
48	Occupancy Sensor	Each	-	-	-	-	$ -	0.0%	Each		-	-	-	$ -	0.0%	Each						0.0%	Each	-	-	-	-	$ -	0.0%
49	LED Night Lights	Each	61,429	70,204	6	-	$ 210,742	1.1%	Each	21,600	25,626	2	-	$ 74,794	0.4%	Each	39,829	44,578	4	-	$ 135,948	0.7%	Each	-	-	-	-	$ -	0.0%
50	New - LED Diffuse Bulb (60W Replacement)	Each	126,909	1,818,606	180	(29,827)	$ 1,776,726	9.4%	Each	55,876	800,703	79	(11,450)	$ 782,264	4.1%	Each	71,033	1,017,903	101	(18,376)	$ 994,462	5.3%	Each	-	-	-	-	$ -	0.0%
51	New - LED Reflector Bulb	Each	7,606	204,426	20	(3,151)	$ 117,134	0.6%	Each	4,044	108,691	11	(1,605)	$ 62,278	0.3%	Each	3,562	95,736	10	(1,547)	$ 54,856	0.3%	Each	-	-	-	-	$ -	0.0%
52	New - LED Reflector Downlight Retrofit Kits	Each	-	-	-	-	$ -	0.0%	Each						0.0%	Each						0.0%	Each	-	-	-	-	$ -	0.0%
53	New - LED A-Lamps	Each	-	-	-	-	$ -	0.0%	Each						0.0%	Each						0.0%	Each	-	-	-	-	$ -	0.0%
54	**Miscellaneous**																											
55	Pool Pumps	Each	-	-	-	-	$ -	0.0%	Each						0.0%	Each						0.0%	Each	-	-	-	-	$ -	0.0%
56	Smart Power Strips - Tier 1	Each	7,624	186,788	-	-	$ 288,593	1.5%	Each	4,958	121,471	-	-	$ 187,669	1.0%	Each	2,666	65,317	-	-	$ 100,925	0.5%	Each	-	-	-	-	$ -	0.0%
57	New - Smart Power Strips - Tier 2	Each	3,042	407,324	61	(5,837)	$ 210,790	1.1%	Each	2,109	282,395	42	(4,039)	$ 146,580	0.8%	Each	933	124,929	19	(1,798)	$ 64,210	0.3%	Each	-	-	-	-	$ -	0.0%
58	**Pilots**																											
59																												
60	**Customer Enrollment**																											
61	Outreach & Assessment	Home	21,387				$ 3,264,516	17.3%	Home	7,785	-	-	-	$ 1,083,892	5.7%	Home	13,602	-	-	-	$ 2,180,624	11.5%	Home	-				$ -	0.0%
62	In-Home Education	Home	21,370				$ 598,425	3.2%	Home	7,781	-	-	-	$ 207,336	1.1%	Home	13,589	-	-	-	$ 391,089	2.1%	Home	-				$ -	0.0%
63																												
64	**Total Savings/Expenditures**			5,514,622	3,627	178,048	$ 18,882,345				2,110,347	939	33,416	$ 6,040,523				3,404,275	2,689	144,632	$ 12,841,822				-	-	-	$ -	
65																												
66	Total Households Weatherized [2]		9,213							2,418							6,795							-					
67																												

68	Households Treated	Total (K+S)		First Touches		Re-treated Homes/Go-Backs		Aliso Canyon	
69	- Single Family Households Treated	Home	8,278	Home	3,419	Home	4,859	Home	-
70	- Multi-family Households Treated	Home	11,633	Home	3,232	Home	8,401	Home	-
71	- Mobile Homes Treated	Home	1,476	Home	1,134	Home	342	Home	-
72	**Total Number of Households Treated**	Home	21,387	Home	7,785	Home	13,602	Home	-
73	**# Eligible Households to be Treated for PY [3]**	Home	21,332	Home	11,667	Home	9,665	Home	-
74	**% of Households Treated**	%	100%	%	67%	%	141%	%	0%
75	- Master-Meter Households Treated	Home	792	Home	621	Home	171	Home	-

76

77 [1] Envelope and Air Sealing Measures may include outlet cover plate gaskets, attic access weatherization, weatherstripping - door, caulking and
78 minor home repairs. Minor home repairs predominantly are door jamb repair / replacement, door repair, and window putty.
79 [2] Weatherization may consist of attic insulation, attic access weatherization, weatherstripping - door, caulking, & minor home repairs
80 [3] Based on OP 79 of D.16-11-022.
81 [4] All savings are calculated based on the following sources:
82 Evergreen Economics "Impact Evaluation of the 2011 CA Low Income Energy Efficiency Program, Final Report." August 30, 2013.
83 [5] Microwave savings are from ECONorthWest Studies received in December of 2011
84 [6] Data for Aliso Canyon includes "First Touches and Re-Treatments".
85

	A	B	C	D	E	F	G	H
1	**SDG&E 2018 Energy Savings Assistance Program Annual Report**							
2	**ESAP Table 2A**							
3	**ESAP Expenses and Energy Savings by Measures Installed**							
4								
5			**ESA Program - CSD Leveraging**					
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	**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 access							
74	minor home repairs. Minor home repairs predominantly are door jamb repair /							
75	[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 2018 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	1	-	-	-	$ 500	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**			-	-	-	$ 500.00	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

93 [2] Weatherization may consist of attic insulation, attic access weatherization, weatherstripping - door, caulking, & minor home repairs.

94 [3] All savings are calculated based on the following sources:

95 [4] Microwave savings are from ECONorthWest Studies received in December of 2011

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

97 [5] Refers to optimizing the installation of the measure installed such as retrofitting pipes, etc.

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.

	A	B	C	D	E
1	**SDG&E PY 2018 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	**2018**	0.68	0.68	(8,197,279)	(3,964,303)
7					
8	Notes:				
9	- All program measures "resource and non-resource measures" are included in the ESACET. Only measures considered "resource measures" are included in the Resource TRC.				
10	- The ESACET includes energy and non-energy benefits and all program costs including measure, installation, and administrative costs.				
11	- The Resource TRC includes energy benefits and program measure and installation costs.				
12	- 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.				
13	- Ordering Paragraph 43 of D.14-08-030 directs the application of the two new cost effectiveness tests, ESACET and Resource TRC.				

SDG&E PY 2018 Energy Savings Assistance Program Annual Report
ESAP Table 4
Detail by Housing Type and Source[1]

Customer	Housing Type	2018 Energy Savings[5] # Homes Treated	(mWh)	MW	(mTherm)	2018 Expenses
Gas and Electric Customers						
Owners - Total		**3,867**	**1,794**	**0.952**	**43**	**7,280,734**
	Single Family	2,270	1,109	0.824	40.1	4,825,522
	Multi Family	242	71	0.044	0.8	238,137
	Mobile Homes	1,355	614	0.083	2.5	2,217,075
Renters - Total		**15,781**	**3,220**	**2.490**	**135**	**10,689,127**
	Single Family	5,166	1,482	1.190	81.3	5,138,113
	Multi Family	10,531	1,704	1.294	53.6	5,500,515
	Mobile Homes	84	34	0.005	(0.2)	50,498
Electric Customers (only)						
Owners - Total		**543**	**213**	**0.106**	**-**	**358,556**
	Single Family	467	188	0.097	-	$309,201
	Multi Family	52	17	0.008	-	$32,147
	Mobile Homes	24	9	0.001	-	$17,208
Renters - Total		**1,196**	**287**	**0.080**	**-**	**553,928**
	Single Family	375	128	0.037	-	$235,261
	Multi Family	808	154	0.043	-	$311,901
	Mobile Homes	13	4	0.000	-	$6,767
Gas Customers (only)						
Owners - Total		**-**				
	Single Family	-	-	-	-	$ -
	Multi Family	-	-	-	-	$ -
	Mobile Homes	-	-	-	-	$ -
Renters - Total		**-**				
	Single Family	-	-	-	-	$ -
	Multi Family	-	-	-	-	$ -
	Mobile Homes	-	-	-	-	$ -
Gas and Electric Total						
Multifamly Common Area Bldgs - Total						
Totals:		**21,387**	**5,515**	**3.627**	**178**	**18,882,345**

Penetration History

Year	Homes Treated[2]	Ineligible & Unwilling[3]	Estimated Eligible in Current Year[4]	Current Year Penetration Rate for Homes Treated
2002	14,089			
2003	15,706			
2004	14,897			
2005	11,254			
2006	13,771			
2007	13,074			
2008	20,804			
2009	20,927	6,685	20,384	103%
2010	21,593	8,690	20,384	106%
2011	22,575	8,423	20,384	111%
2012	22,415	7,871	20,316	110%
2013	17,568	13,411	20,316	86%
2014	22,039	15,738	20,316	108%
2015	20,209	17,308	20,316	99%
2016	19,792	22,570	20,316	97%
2017	13,212	30,306	11,563	114%
2018	7,785	50,716	11,667	67%
2019				
2020				
Total Homes Treated since 2002	291,710	181,718	185,962	

[1] Summary data which includes ESA Program, CSD Leveraging, and MF efforts.

[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.

[3] Ineligible & Unwilling defined in ESA Table 8.

[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 and 2018, this is based on the calculation of remaining eligible households as described on 1) 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 (for the 2017 value) and 2) SDG&E's Midcycle Advice Letter filed July 16, 2018 (for the 2018 value).

[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.

Year	Utility in Shared Service Territory	Eligible Households in Shared Service Territory	Eligible Households Treated by Both Utilities in Shared Service Territory
2018	SoCalGas	18,866	184

	A	B	C	D	E	F	G
1	**SDG&E PY 2018 Energy Savings Assistance Program Annual Report** **ESAP Table 5** **ESAP Direct Purchases & Installation Contractors**						
2			**Contractor Type**				**2018 Annual**
3	**Contractor**	**County**	**Private**	**CBO**	**WMDVBE**	**LIHEAP**	**Expenditures[1] [2]**
4	AMERICAN INSULATION INC	San Diego	x		x		$ 3,303,065
5	AMERIMEX PLUMBING	San Diego	x		x		$ -
6	CAMPESINOS UNIDOS INC	San Diego		x	x	x	$ 831,860
7	CAPITAL STATE CONTRUCTION	San Diego	x				$ 920,310
8	EAGLE SYSTEMS INTERNATIONAL INC	San Diego	x				$ 1,590,054
9	JERRY'S HEATING & AIR CONDITIONING, INC	San Diego	x				$ 897,539
10	MAAC PROJECT	San Diego		x	x	x	$ 1,481,569
11	R&B WHOLESALE DISTRIBUTOR INC	San Diego	x				$ 1,087,279
12	RANCHO ENERGY SERVICES	San Diego	x				$ 1,183,673
13	RELIABLE ENERGY MANAGEMENT INC	San Diego	x		x		$ 395,764
14	RICHARD HEATH & ASSOCIATES INC	San Diego, Orange			x		$ 6,023,751
15	THA HEATING AND AIR CONDITIONING INC	San Diego	x				$ 1,167,481
16							
17	**Total Contractor Expenditures**						**$ 18,882,345**
18							
19	[1] Adjusted to reflect true 2018 contractor activity, net of accruals. Includes Energy Efficiency Total from ESA Table 1 and In-home Education from ESA Table 1A.						
20	[2] Contractor activity excludes expenses from Pilot and Multi-Family Common Area Measures reflected in ESA Tables 1A, 7 and 12.						

SDG&E PY 2018 Energy Savings Assistance Program Annual Report
ESAP Table 6
ESAP Installation Cost of Program Installation Contractors [1]

		Unit of Measure	CBO/WMDVBE						Non-CBO/WMDVBE						2018 Program Total				
			Installations		Dwellings		Costs		Installations		Dwellings		Costs						Cost/
			Units	%	Units	%	$	%	Units	%	Units	%	$	%	Units Installed	Households	Costs	Cost/ Unit	Household
5	Dwellings	Each	270,538	82%	19,280	90%	$ 12,085,367	64%	58,183	18%	2,107	10%	$ 6,796,978	36%	328,721	21,387	$ 18,882,345	$ 57.44	$ 882.89
6	**Appliances**																		
7	High Efficiency Clothes Washer	Each	-	0%	-	0%	$ -	0%	313	100%	313	100%	$ 238,847	100%	313	313	$ 238,847	$ 763	$ 763
8	Refrigerators	Each	-	0%	-	0%	$ -	0%	995	100%	990	100%	$ 848,432	100%	995	990	$ 848,432	$ 853	$ 857
9	Microwaves	Each	8,972	93%	9,005	92%	$ 958,366	91%	722	7%	732	8%	$ 89,565	9%	9,694	9,737	$ 1,047,932	$ 108	$ 108
10	**Domestic Hot Water**																		
11	Water Heater Blanket	Home	213	96%	213	96%	$ 12,335	97%	9	4%	9	4%	$ 403	3%	222	222	$ 12,738	$ 57	$ 57
12	Low Flow Shower Head	Home	4,048	55%	4,044	55%	$ 255,515	55%	3,299	45%	3,297	45%	$ 205,393	45%	7,347	7,341	$ 460,909	$ 63	$ 63
13	Water Heater Pipe Insulation	Home	175	72%	175	72%	$ 5,188	72%	68	28%	68	28%	$ 2,055	28%	243	243	$ 7,242	$ 30	$ 30
14	Faucet Aerator	Home	12,502	89%	12,231	89%	$ 99,456	85%	1,558	11%	1,543	11%	$ 17,799	15%	14,060	13,774	$ 117,255	$ 8	$ 9
15	Water Heater Repair/Replacement	Each	388	49%	384	49%	$ 37,855	7%	401	51%	397	51%	$ 487,412	93%	789	781	$ 525,267	$ 666	$ 673
16	Thermostatic Shower Valve	Each	2,358	63%	1,680	62%	$ 147,551	63%	1,402	37%	1,011	38%	$ 87,765	37%	3,760	2,691	$ 235,316	$ 63	$ 87
17	New - Combined Showerhead/TSV	Each	1	50%	1	50%	$ 68	50%	1	50%	1	50%	$ 68	50%	2	2	$ 137	$ 68	$ 68
18	New - Heat Pump Water Heater	Each		0%		0%	$ -	0%		0%		0%		0%	-	-	$ -	$ -	$ -
19	New - Tub Diverter/ Tub Spout	Each	4	44%	4	44%	$ 401	36%	5	56%	5	56%	$ 702	64%	9	9	$ 1,103	$ 123	$ 123
20	New - Thermostat-controlled Shower Valve	Each		0%		0%	$ -	0%		0%		0%		0%	-	-	$ -	$ -	$ -
21	**Enclosure**																		
22	Air Sealing / Envelope	Home	4,934	54%	4,934	54%	$ 2,427,151	58%	4,145	46%	4,145	46%	$ 1,748,818	42%	9,079	9,079	$ 4,175,969	$ 460	$ 460
23	Attic Insulation	Home	148	57%	150	57%	$ 170,970	55%	111	43%	111	43%	$ 137,304	45%	259	261	$ 308,274	$ 1,190	$ 1,181
24	**HVAC**																		
25	FAU Standing Pilot Light Conversion	Each	-	0%	-	0%	$ -	0%	1	100%	1	100%	$ 324	100%	1	1	$ 324	$ 324	$ 324
26	Furnace Repair/Replacement	Each	1,867	64%	1,867	64%	$ 198,507	11%	1,065	36%	1,065	36%	$ 1,570,233	89%	2,932	2,932	$ 1,768,740	$ 603	$ 603
27	Room A/C Replacement	Each	192	100%	179	100%	$ 194,261	100%	-	0%	-	0%	$ -	0%	192	179	$ 194,261	$ 1,012	$ 1,085
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	129	72%	129	72%	$ 12,215	35%	50	28%	50	28%	$ 23,045	65%	179	179	$ 35,260	$ 197	$ 197
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	2,507	93%	2,503	93%	$ 193,962	94%	193	7%	193	7%	$ 12,542	6%	2,700	2,696	$ 206,504	$ 76	$ 77
39	Central A/C Tune-up	Home		0%	-	0%	$ -	0%		0%		0%		0%	-	-	$ -	$ -	$ -
40	Evaporative Cooler Maintenance	Home		0%	-	0%	$ -	0%	-	0%	-	0%		0%	-	-	$ -	$ -	$ -
41	**Lighting**																		
42	Compact Fluorescent Lights (CFLs)	Each		0%		0%		0%		0%		0%		0%	-	-	$ -	$ -	$ -
43	Interior Hard wired CFL fixtures	Each	7,080	75%	2,587	71%	$ 565,541	75%	2,349	25%	1,033	29%	$ 186,447	25%	9,429	3,620	$ 751,988	$ 80	$ 208
44	Exterior Hard wired CFL fixtures	Each	2,035	72%	1,135	68%	$ 140,450	72%	784	28%	541	32%	$ 54,096	28%	2,819	1,676	$ 194,546	$ 69	$ 116
45	Torchiere	Each	10,956	76%	5,052	72%	$ 981,966	76%	3,374	24%	2,004	28%	$ 302,412	24%	14,330	7,056	$ 1,284,377	$ 90	$ 182
46	Occupancy Sensor	Each		0%	-	0%	$ -	0%		0%	-	0%		0%	-	-	$ -	$ -	$ -
47	LED Night Lights	Each	55,571	90%	19,071	90%	$ 186,889	89%	5,858	10%	2,021	10%	$ 23,853	11%	61,429	21,092	$ 210,742	$ 3	$ 10
48	New - LED Diffuse Bulb (60W Replacement)	Each	103,651	82%	19,086	86%	$ 1,451,114	82%	23,258	18%	3,208	14%	$ 325,612	18%	126,909	22,294	$ 1,776,726	$ 14	$ 80
49	New - LED Reflector Bulb	Each	6,277	83%	1,671	83%	$ 96,667	83%	1,329	17%	351	17%	$ 20,467	17%	7,606	2,022	$ 117,134	$ 15	$ 58
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	5,868	77%	4,489	83%	$ 222,104	77%	1,756	23%	915	17%	$ 66,490	23%	7,624	5,404	$ 288,593	$ 38	$ 53
55	New - Smart Power Strips - Tier 2	Each	2,112	69%	1,245	66%	$ 146,770	70%	930	31%	655	34%	$ 64,020	30%	3,042	1,900	$ 210,790	$ 69	$ 111
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	19,280	90%	19,280	90%	$ 3,029,823	93%	2,107	10%	2,107	10%	$ 234,693	7%	21,387	21,387	$ 3,264,516	$ 153	$ 153
65	In-Home Education	Home	19,270	90%	19,270	90%	$ 550,243	92%	2,100	10%	2,100	10%	$ 48,182	8%	21,370	21,370	$ 598,425	$ 28	$ 28
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.																		

	A	B	C	D	E
1	**SDG&E PY 2018 Energy Savings Assistance Program Annual Report** **ESAP Table 7** **Expenditures Recorded by Cost Element**				
2	**ESA Program:**	**Labor**	**Non-Labor**	**Contractor**	**Total [1]**
3	Energy Efficiency				
4	Appliances	$ -	$ -	$ 2,133,996	$ 2,133,996
5	Domestic Hot Water	$ -	$ -	$ 1,353,518	$ 1,353,518
6	Enclosure	$ -	$ -	$ 4,273,403	$ 4,273,403
7	HVAC	$ -	$ -	$ 2,219,198	$ 2,219,198
8	Maintenance	$ -	$ -	$ 201,501	$ 201,501
9	Lighting	$ -	$ -	$ 4,335,512	$ 4,335,512
10	Miscellaneous	$ -	$ -	$ 499,383	$ 499,383
11	Customer Enrollment	$ -	$ -	$ 3,265,916	$ 3,265,916
12	In Home Education	$ -	$ -	$ 599,919	$ 599,919
13	Pilot	$ -	$ 4,586	$ 6,490	$ 11,076
14	Multi-Family Common Area Measures[2]	$ (4,146)	$ 13,332	$ 52,088	$ 61,273
15	**Energy Efficiency TOTAL**	**$ (4,146)**	**$ 17,918**	**$ 18,940,922**	**$ 18,954,694**
16					
17	Training Center	$ -	$ -	$ -	$ -
18	Inspections	$ 117,540	$ 912	$ -	$ 118,451
19	Marketing and Outreach	$ 14,419	$ 1,155,201	$ -	$ 1,169,620
20	Statewide Marketing Education and Outreach	$ -	$ -	$ -	$ -
21	Measurement and Evaluation Studies[3]	$ (11,842)	$ 54,753	$ -	$ 42,911
22	Regulatory Compliance	$ 166,682	$ 54,531	$ 1	$ 221,215
23	General Administration	$ 1,202,326	$ 1,172,224	$ -	$ 2,374,550
24	CPUC Energy Division	$ -	$ 14,741	$ -	$ 14,741
25					
26	**TOTAL PROGRAM COSTS**	**$ 1,484,980**	**$ 2,470,279**	**$ 18,940,924**	**$ 22,896,182**
27					
28	[1] Adjusted to reflect true 2018 contractor activity, net of accruals. Contractor Activity in Table 5 excludes Pilots and Multi-Family Common Area Measures.				
29	[2] Negative amount is the result of a correction to 2017 labor expenses from Multi-Family Common Area Measures to General Administration in the amount of $4.2K.				
30	[3] Negative amount is the result of a reversal for the incorrect allocation of 2017 overheads (V&S and Payroll Taxes) in the amount of $11.8K.				

	A	B	C	D	E	F	G	H
1	**SDG&E PY 2018 Energy Savings Assistance Program Annual Report** **ESAP Table 8** **ESAP Homes Unwilling / Unable to Participate [1]**							
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	27,909	15,129	51	-	1,809	503	1,746
5	ORANGE	623	2,747	2	-	152	3	42
6								
7								
8								
9								
10								
11	**Total**	**28,532**	**17,876**	**53**	**-**	**1,961**	**506**	**1,788**
12								
13								
14	[1] Summary data which includes ESA Program, CSD Leveraging, and MF Common Area efforts.							
15								
16	**ESAP Coordinated Treatment (SCE and SCG only)**							
17		**Reason Why Household did not Receive Additional Measures from one Utility or Partnering Agency [1]**						
18	**# 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**		
19								
20								
21	**Total**	**-**	**-**	**-**	**-**	**-**		
22								
23								
24	[1] Summary data which includes ESA Program, CSD Leveraging, and MF Common Area efforts.							

SDG&E PY 2018 Energy Savings Assistance Program Annual Report
ESAP Table 9
Life Cycle Bill Savings by Measure [1][3]

	Measure Description		2018 Number Installed	Per Measure Electric Impact (kWh)	Per Measure Gas Impact (Therms)	Effective Useful Life (EUL)	2018 Total Measure Life Cycle Bill Savings
3	**Appliances**						
4	High Efficiency Clothes Washer	Each	313	3.5	15.4	11	$ 59,695
5	Refrigerators	Each	995	621.6	-	14	$ 1,536,743
6	Microwaves [2]	Each	9,694	22.8	15.4	10	$ 2,010,802
7	**Domestic Hot Water**						
8	Water Heater Blanket	Home	219	0.3	0.4	5	$ 556
9	Low Flow Shower Head	Home	7336	0.1	0.8	10	$ 64,832
10	Water Heater Pipe Insulation	Home	243	0.0	0.0	11	$ 70
11	Faucet Aerator	Home	13325	0.1	0.5	10	$ 80,386
12	Water Heater Repair/Replacement	Each	768	-	6.8	11	$ 62,306
13	Thermostatic Shower Valve	Each	3760	3.4	2.8	10	$ 97,435
14	New - Combined Showerhead/TSV	Each	2	-	9.6	10	$ 208
15	New - Heat Pump Water Heater	Each	0	-	-		$ -
16	New - Tub Diverter/ Tub Spout	Each	9	7.2	1.8	10	$ 290
17	New - Thermostat-controlled Shower Valve	Each	0	-	-	0	$ -
18	**Enclosure**						
19	Air Sealing / Envelope	Home	8,954	6.8	1.9	11	$ 325,173
20	Attic Insulation	Home	257	10.4	24.3	20	$ 147,570
21	**HVAC**						
22	FAU Standing Pilot Light Conversion	Each	1	-	15.1	13	$ 213
23	Furnace Repair/Replacement	Each	2,553	-	-	20	$ -
24	Room A/C Replacement	Each	192	27.5	-	9	$ 3,231
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	154	7.6	14.4	18	$ 46,898
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	2,682	-	13.0	5	$ 187,540
36	Central A/C Tune-up	Home	-	-	-		$ -
37	Evaporative Cooler Maintenance	Home	-	-	-		$ -
38	**Lighting**						
39	Compact Fluorescent Lights (CFLs)	Each	-	-	-		$ -
40	Interior Hard wired CFL fixtures	Each	9,429	177.7	(0.1)	16	$ 1,832,467
41	Exterior Hard wired CFL fixtures	Each	2,819	174.4	-	16	$ 834,939
42	Torchiere	Each	14,330	139.7	(3.3)	16	$ 2,392,560
43	Occupancy Sensor	Each	-	-	-		$ -
44	LED Night Lights	Each	61,429	3.3	-	16	$ 200,570
45	New - LED Diffuse Bulb (60W Replacement)	Each	126,909	84.3	(1.4)	16	$ 4,678,119
46	New - LED Reflector Bulb	Each	7,606	101.3	(1.6)	16	$ 529,355
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	7,624	34.6	-	8	$ 266,824
52	New - Smart Power Strips - Tier 2	Each	3,042	214.4	(3.1)	8	$ 531,208
53	**Ancillary Services**						
54	Commissioning	Home					
55	Audit	Home					
56	Administration	Home					
57	**Pilots**						
58							
59							
60	**Total**						$ 15,889,992
61							
62	**Total Homes Served By the Program**	21,387					
63	**Life Cycle Bill Savings Per Home**	$ 743					
64							
65							

66 [1] Summary data which includes ESA Program, CSD Leveraging, and MF commona 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 2018 Energy Savings Assistance Program Annual Report** **ESAP Table 10** **Energy Rate Used for Bill Savings Calculations [1]**		
2	Year	$/kWh	$/Therm
3	2018	0.18	1.08
4	2019	0.18	1.12
5	2020	0.19	1.15
6	2021	0.20	1.19
7	2022	0.20	1.22
8	2023	0.21	1.26
9	2024	0.21	1.30
10	2025	0.22	1.33
11	2026	0.23	1.37
12	2027	0.23	1.42
13	2028	0.24	1.46
14	2029	0.25	1.50
15	2030	0.25	1.55
16	2031	0.26	1.59
17	2032	0.27	1.64
18	2033	0.28	1.69
19	2034	0.29	1.74
20	2035	0.30	1.79
21	2036	0.30	1.85
22	2037	0.31	1.90
23	2038	0.32	1.96
24	2039	0.33	2.02
25	2040	0.34	2.08
26	2041	0.35	2.14
27	2042	0.36	2.20
28	2043	0.37	2.27
29			
30	[1] For 2018, 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.		

	A	B	C	D	E
1	**SDG&E PY 2018 Energy Savings Assistance Program Annual Report ESAP Table 11 Bill Savings Calculations by Program Year [1]**				
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	$ 272
10	2018*	$ 22,780,528	$ 15,889,992	0.70	$ 743
11					
12					
13	[1] Summary data which includes ESA Program, CSD Leveraging, and MF Common Area efforts.				
14	* The primary reason for the increase in 2018 savings compared to previous years is the addition to the program of LED lighting measures.				

SDG&E PY 2018 Energy Savings Assistance Program Annual Report
ESAP Table 12
Fund Shifting[1]

	Date[4]	Program Year 2018	Budget[1] Electric	Budget[1] Gas	Budget[1] Total Authorized	Expenditures Electric	Expenditures Gas	Expenditures Total Expenditures	(Shift) or Carried Forward (Budget - Expenditures = Variance) Electric	Variance Gas	Variance Total	FUND SHIFT AMOUNT: Among Categories within Program Year 1-3 (1) Shift of Current Year Authorized Electric	Gas	Total	Carry Forward from 2017 (2) Shift of Carry Forward Electric	Gas	Total	Carry Back from 2018 (3) Shift of Carry Back Electric	Gas	Total	Total Shifted Gas/ Electric[4]	% of Authorized Total	Fund Shifting Source 1. Current Year Authorized 2. Carried Forward 3. Carried Back	To/From Year	Fund Shift Description	Authorization
		ESA Program:	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	*($x,xxx)*	*x%*				*G-xxxx, D.xx- xx-xxx*
		Energy Efficiency																									
		Appliance	$ 3,555,699	$ 1,331,212	**$ 4,886,911**	$ 2,061,712	$ 72,284	**$ 2,133,996**	$ 1,493,987	$ 1,258,928	**$ 2,752,915**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
		Domestic Hot Water	$ 63,721	$ 2,060,311	**$ 2,124,032**	$ 40,606	$ 1,312,912	**$ 1,353,518**	$ 23,116	$ 747,398	**$ 770,514**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
		Enclosure	$ 1,917,114	$ 2,966,933	**$ 4,884,047**	$ 1,837,563	$ 2,435,840	**$ 4,273,403**	$ 79,551	$ 531,093	**$ 610,644**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
		HVAC	$ 424,438	$ 3,701,892	**$ 4,126,330**	$ 194,261	$ 2,024,937	**$ 2,219,198**	$ 230,177	$ 1,676,955	**$ 1,907,133**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
		Maintenance	$ 13,491	$ 556,995	**$ 570,486**	$ -	$ 201,501	**$ 201,501**	$ 13,491	$ 355,495	**$ 368,985**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
		Lighting[3]	$ 2,977,421	$ -	**$ 2,977,421**	$ 4,335,512	$ -	**$ 4,335,512**	$ (1,358,090)	$ -	**$ (1,358,090)**	$ -	$ -	**$ -**	$ 1,358,090	$ -	**$ 1,358,090**	$ -	$ -	**$ -**	$ (1,358,090)	4%	1. 2. Carry Forward 3.	1. 2. 2009-2016 3.	1. 2. Request to use 2009-2016 unspent funds. Exceeded budget to cover overage of new LED measures that were not originally requested in 2017-2020 budget. 3.	1. 2. 3.
		Miscellaneous	$ 1,576,005	$ -	**$ 1,576,005**	$ 499,383	$ -	**$ 499,383**	$ 1,076,621	$ -	**$ 1,076,621**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0.0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
		Customer Enrollment	$ 2,150,145	$ 2,150,145	**$ 4,300,290**	$ 1,632,958	$ 1,632,958	**$ 3,265,916**	$ 517,187	$ 517,187	**$ 1,034,374**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Oct-18	In Home Education[2]	$ 499,385	$ 499,385	**$ 998,769**	$ 299,960	$ 299,959	**$ 599,919**	$ 199,425	$ 199,425	**$ 398,850**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0.0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
		Pilot[2]	$ 150,000	$ 150,000	**$ 300,000**	$ 5,538	$ 5,538	**$ 11,076**	$ 144,462	$ 144,462	**$ 288,924**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
		Fund Shifting Offset	$ -	$ -	**$ -**			**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
		Multi-Family Common Area Measures	$ 415,000	$ 415,000	$ 830,000	$ 30,636	$ 30,637	$ 61,273	$ 384,364	$ 384,363	**$ 768,727**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
		Leveraging	$ 241,216	$ 241,216	$ 482,431	$ -	$ -	$ -	$ 241,216	$ 241,216	**$ 482,431**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
		Energy Efficiency TOTAL	**$ 13,983,635**	**$ 14,073,087**	**$ 28,056,722**	**$ 10,938,129**	**$ 8,016,565**	**$ 18,954,694**	**$ 3,045,506**	**$ 6,056,523**	**$ 9,102,028**	**$ -**	**$ -**	**$ -**	**$ 1,358,090**	**$ -**	**$ 1,358,090**	**$ -**	**$ -**	**$ -**	**$ (1,358,090)**	4.0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
		Training Center	$ 239,417	$ 239,417	$ 478,834	$ -	$ -	$ -	$ 239,417	$ 239,417	**$ 478,834**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
		Inspections	$ 86,707	$ 86,707	$ 173,414	$ 59,226	$ 59,226	$ 118,451	$ 27,481	$ 27,481	**$ 54,962**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. . 3.	1. 2. 3.
		Marketing and Outreach	$ 600,000	$ 600,000	$ 1,200,000	$ 584,810	$ 584,810	$ 1,169,620	$ 15,190	$ 15,190	**$ 30,380**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
		Statewide ME&O[2]	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
		M&E Studies[2]	$ 47,708	$ 47,708	$ 95,416	$ 21,455	$ 21,456	$ 42,911	$ 26,253	$ 26,252	**$ 52,505**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
		Regulatory Compliance[2]	$ 136,982	$ 136,982	$ 273,964	$ 110,607	$ 110,607	$ 221,215	$ 26,374	$ 26,375	**$ 52,749**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
		General Administration[2]	$ 1,366,139	$ 1,366,139	$ 2,732,278	$ 1,187,275	$ 1,187,275	$ 2,374,550	$ 178,864	$ 178,864	**$ 357,728**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
		CPUC Energy Division[2]	$ 22,950	$ 22,950	$ 45,900	$ 7,370	$ 7,370	$ 14,741	$ 15,580	$ 15,580	**$ 31,159**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
		Reallocation (ME&O budget reduced from $1.2M)	$ 343,848	$ 343,848	$ 687,695	$ -	$ -	$ -	$ 343,848	$ 343,848	**$ 687,695**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
		TOTAL PROGRAM COSTS	**$ 16,827,385**	**$ 16,916,838**	**$ 33,744,223**	**$ 12,908,873**	**$ 9,987,309**	**$ 22,896,182**	**$ 3,918,512**	**$ 6,929,529**	**$ 10,848,041**	**$ -**	**$ -**	**$ -**	**$ 1,358,090**	**$ -**	**$ 1,358,090**	**$ -**	**$ -**	**$ -**	**$ (1,358,090)**	**4.0%**				
		Carryforward from 2017 and prior years[5]	$ 24,646,890	$ 22,532,294	$ 47,179,184	$ -	$ -	$ -	$ 24,646,890	$ 22,532,294	$ 47,179,184				$ 24,646,890	$ 22,532,294	$ 47,179,184									
		Approved Budget for Unspent Funds in 2018	$ 1,056,151	$ 1,056,151	$ 2,112,302	$ 57,827	$ 57,827	$ 115,654	$ 998,324	$ 998,324	$ 1,996,648				$ 998,324	$ 998,324	$ 1,996,648									
		TOTAL PROGRAM INCLUDING CARRY FORWARD / CARRY BACK	**$ 40,418,124**	**$ 38,392,981**	**$ 78,811,105**	**$ 12,851,046**	**$ 9,929,482**	**$ 22,780,527**	**$ 27,567,078**	**$ 28,463,499**	**$ 56,030,577**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**					

[1] Reflects authorized budget in SDG&E Advice Letter 3065-E-A/2568-G-A approved by Commission Resolution E-4884 on December 14, 2017 and SDG&E Advice Letter 3250-E/2688-G approved by Commission on December 27, 2018.

[2] Prior written authorization from the Commission is required before the utilities can shift into or out of these categories.

[3] SDG&E shifted funds in accordance with Section 20 of Funding Shifting Rules set forth in D.08-11-031, as modified by D.10-10-008, D.12-08-044 and D.14-08-030.

[4] This is the month in which the category was over budget. However, SDG&E did not shift any funds until year-end 2018.

[5] Carryforward from 2016 and prior years includes approved carryforward fundshifting in D.14-08-030 of $9,398,216 and a budget augmentation for gas in the amount of $3,769,897

[6] Total unspent funds are based on Authorized budgets less expenditures. The unspent amount is not the same as the amounts (over/under collection) in the Balancing Accounts which are based on the annual collections minus the annual expenditures.

[7] SDG&E's unspent/over-collected funds at the end of 2016 totalled $23,322,672. D.16-11-022 authorized $12,999,109 to be used in the 2017-2020 budget cycle.

Total Unspent Funds Carry forward into 2018	**$ 24,646,890**	**$ 22,532,294**	**$ 47,179,184**
Total Shifted during 2018	$ (1,358,090)	$ -	$ (1,358,090)
Remaining Carryforward from 2016 after fund shift for 2018	**$ 23,288,799**	**$ 22,532,294**	**$ 45,821,093**
Totals not available for fund shift w/out prior written authorization[7]	$ 247,071	$ 247,070	$ 494,142
2018 Unspent Funds	$ 3,671,441	$ 6,682,458	$ 10,353,900
Total Unspent Funds Carry forward into 2019[6]	**$ 27,207,312**	**$ 29,461,823**	**$ 56,669,135**

Total Unspent/Over-collected Funds from 2016[7]	**$ 12,313,334**	**$ 11,009,338**	**$ 23,322,672**
Unspent Funds Approved for Use in Resolution E-4884	$ 6,419,980	$ 6,539,812	$ 12,959,792
rates	**$ 5,893,354**	**$ 4,469,526**	**$ 10,362,880**
Unspent/Over-collected Funds from 2017	**$ 5,438,620**	**$ (315,786)**	**$ 5,122,834**
Less funds spent in 2017 per E-4884 (See Table 1a)	$ (71,293)	$ (71,293)	$ (142,586)
Future Rates	**$ 11,260,681**	**$ 4,082,447**	**$ 15,343,128**
Unspent/Over-collected Funds from 2018	**$ 3,025,816**	**$ 5,608,088**	**$ 8,633,904**
Less funds spent in 2018 per E-4884 (See Table 1a)	$ (57,827)	$ (57,827)	$ (115,654)
Less funds amortized in 2019 rates	$ (10,000,000)	$ (10,000,000)	$ (20,000,000)
Future Rates	**$ 4,228,670**	**$ (367,292)**	**$ 3,861,378**

	A	B
1	**SDG&E PY 2018 Energy Savings Assistance Program Annual Report**	
2	**ESAP Table 13**	
3	**Categorical and Other Enrollment [1]**	
4		
5		
6	**Type of Enrollment**	**Number of Homes Treated**
7	Women, Infants, and Children Program (WIC)	647
8	Supplemental Security Income (SSI)	520
9	CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	602
10	CalWORKs/Temporary Assistance for Needy Families (TANF)	26
11	Tribal TANF	-
12	Medicaid/Medi-Cal for Families	1,190
13	Healthy Families A&B	122
14	National School Lunch Program (NSLP) - Free Lunch	201
15	Low-income Home Energy Assistance Program (LIHEAP)	856
16	Bureau of Indian Affairs General Assistance	-
17	Head Start Income Eligible - (Tribal Only)	-
18	Targeted Self Certification	13,854
19	Standard Enrollment	3,369
20	**Total**	**21,387**
21		
22	[1] Summary data which includes ESA Program and CSD Leveraging efforts.	
23	Note: Does not include MF common area efforts.	

	A	B	C	D	E	F	G	H	I	J	K
1	**SDG&E PY 2018 Energy Savings Assistance Program Annual Report** **ESAP Table 14** **Leveraging & Integration [6]**										
2											
3	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
4	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 preform outreach and assesment services.	Yes	Contract	None	249,296 kWh 176 kW 4,213 therms		856	Sum of savings per treated homes identified as having LIHEAP as program for categorical enrollment.	N/A	
5	CSD	Data sharing effort providing CSD with customer usage information for CSD client receiving weatherization service and payment assistance	Yes	Yes	None			N/A			
6	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 weatherizaiton services through ESA.	Yes	Yes	None	0 kWh 0 kW 0 therms		0			
7	EUC MIDI Program	Lead Sharing between ESA Program and MIDI	No	No	None	0 kWh 0 kW 0 therms		0			
8	CARE/Medical Baseline	Marketing to customers enrolled in CARE and/or Medical Baseline	No	No	None	81,814 kWh 30.59 kW 1,648 therms		199	Sum of savings per treated homes identified as having CARE or Medical Baseline as lead source.		
9	CARE High Usage	Automated Lead Generation for CARE High Usage Verification Process	No	No	None	14,835 kWh 5.96 kW 75 therms		88	Sum of savings per treated homes identified as having CARE High Usage as lead source.		
10											
11											
12	[1] Leveraging, Interdepartmental integration, Program Coordination, Data Sharing, ME&O, etc.										
13	[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).										
14	[3] Annual Energy savings/benefits for measures installation in 2018. Leveraging efforts are measurable and quantifiable in terms of home energy benefits/ savings to the eligible households.										
15	[4] Enrollment increases. Leveraging efforts are measurable and quantifiable in terms of program enrollment increases and/or customers served.										
16	[5] In footnotes, provide information on methodology used to calculate cost and/or resource savings.										
17	[6] Summary data which includes ESA Program, CSD Leveraging, and MF common area efforts.										
18											
19	Fields not applicable to specific efforts are marked "N/A".										

	A	B	C	D	E	F
1	**SDG&E PY 2018 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						
9						
10	**This Table is Not Applicable.**					
11	**Commission D.16-11-022 and D.17-12-009 directs the IOU to no longer offer CFL's in ESA Program beginning 1/1/2018.**					
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	2018	21,387	0	0	0	
28						
29	[1] Bulb cost and admin cost were combined effective 2013.					
30						
31	[2] Compliant in regards to: 1) Do bulbs meet or exceed CEC energy efficiency standards for general purpose lighting?					
32	Do all models comply with Europe's RoHS standards on toxicity?					
33						
34	[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.					
35						
36	[4] Summary data which includes ESA Program, CSD Leveraging, and MF efforts.					

	A	B	C	D	E	F	G
1	**SDG&E PY 2018 Energy Savings Assistance Program Annual Report**						
2	**ESAP Table 16**						
3	**"Add Back" Measures**						
4							
5			**Ratio of Benefits Over Costs**				
6	**Measure [1][2]**	**Climate Zone**	**ESACET**	**Resouce TRC**	**Quantity Installed**	**Budget Impact of "Add Back"**	**Lifecycle Bill Savings Impact**
7	Furnace Repair/Replacement MF	7	0.00	N/A	71	21,835	$ -
8	Furnace Repair/Replacement MF	10	0.00	N/A	116	25,863	$ -
9	Furnace Repair/Replacement MH	7	0.00	N/A	273	304,864	$ -
10	Furnace Repair/Replacement MH	10	0.00	N/A	270	301,961	$ -
11	Furnace Repair/Replacement MH	15	0.00	N/A	2	235	$ -
12	Furnace Repair/Replacement SF	7	0.00	N/A	929	607,652	$ -
13	Furnace Repair/Replacement SF	10	0.00	N/A	750	487,097	$ -
14	Water Heater Repair/Replacement MF	7	0.45	N/A	8	6,520	$ 649
15	Water Heater Repair/Replacement MF	10	0.45	N/A	8	3,366	$ 649
16	Water Heater Repair/Replacement MH	7	0.45	N/A	135	138,842	$ 10,952
17	Water Heater Repair/Replacement MH	10	0.45	N/A	122	132,339	$ 9,897
18	Water Heater Repair/Replacement MH	15	0.45	N/A	2	1,500	$ 162
19	Water Heater Repair/Replacement SF	7	0.45	N/A	312	146,529	$ 25,312
20	Water Heater Repair/Replacement SF	10	0.45	N/A	181	96,172	$ 14,684
21	Room A/C Replacement MF	10	0.05	N/A	35	35,412	$ 1,392
22	Room A/C Replacement MH	10	0.05	N/A	12	12,141	$ 477
23	Room A/C Replacement SF	10	0.05	N/A	33	33,389	$ 1,362
24	Duct sealing gas MF	10	0.49	0.91	2	458	$ 483
25	Duct sealing gas MH	7	0.56	1.27	1	229	$ 336
26	Duct sealing gas MH	10	0.49	0.92	3	687	$ 730
27	Duct sealing electric SF	7	0.00	0.00	1	229	$ -
28	Duct sealing gas SF	7	0.56	1.27	61	13,967	$ 20,471
29	Duct sealing gas SF	10	0.49	0.91	65	14,882	$ 15,684
30	Duct sealing gas SF w/ac	7	0.63	1.63	9	2,061	$ 4,632
31	Duct sealing gas SF w/ac	10	0.58	1.27	12	2,748	$ 5,045
32	Attic insulation gas MF cz7	7	0.42	0.44	1	1,200	$ 625
33	Attic insulation gas MF cz10	10	0.38	0.38	1	1,200	$ 536
34	Attic insulation gas MF cz10 w/ac	10	0.49	0.50	1	1,200	$ 874
35							
36	Notes:						
37	[1] Based on Appendix J.1 and J.2 in D.12-08-044 and D.14-08-030.						
38	[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 2018 Energy Savings Assistance Program Annual Report**									
2	**ESAP Table 17**									
3	**Expenditures for Pilots and Studies**									
4										
5		**Authorized 2018 Funding[1]**			**2018 Expenses**			**% of Budget Expensed**		
6		**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**
7	**Pilots**									
8										
9	Programmable Controllable Thermostat	$ 150,000	$ 150,000	$ 300,000	$ 5,538	$ 5,538	$ 11,076	4%	4%	4%
10										
11	**Total Pilots**	**$150,000**	**$150,000**	**$300,000**	**$5,538**	**$5,538**	**$11,076**	**4%**	**4%**	**4%**
12										
13										
14	**Studies**									
15										
16	Low Income Needs Assessment Study	$ 8,334	$ 8,334	$ 16,667	$ -	$ -	$ -	0%	0%	0%
17	Load Impact Evaluation Study [2]	$ 9,167	$ 9,167	$ 18,333	$ 14,690	$ 14,690	$ 29,380	160%	160%	160%
18	Equity Criteria and Non Energy Benefits Evaluation (NEB's) [3]	$ 2,500	$ 2,500	$ 5,000	$ 6,766	$ 6,766	$ 13,531	271%	271%	271%
19	Unallocated Funds [4]	$ (2,917)	$ (2,917)	$ (5,834)	$ -	$ -	$ -	0%	0%	0%
20	2017 Potential and Goals Study	$ 5,625	$ 5,625	$ 11,250	$ -	$ -	$ -	0%	0%	0%
21	Rapid Feedback Research and Analysis	$ 25,000	$ 25,000	$ 50,000	$ -	$ -	$ -	0%	0%	0%
22										
23	**Total Studies**	**$47,708**	**$47,708**	**$95,416**	**$21,455**	**$21,456**	**$42,911**	**45%**	**45%**	**45%**
24										
25	[1] Reflects authorized budget in SDG&E Advice Letter 3065-E-A/2568-G-A approved by Commission Resolution E-4884 on December 14, 2017 and SDG&E Advice Letter 3250-E/2688-G approved by Commission on December 27, 2018.									
26	[2] Expense activity from Southern California Gas as lead utility was higher than anticipated, however expenses are expected to stay within 2017-2020 cycle budget.									
27	[3] Reflects true 2018 NEB's Study activity, net of co-funding reimbuersments billed in 2019.									
28	[4] Unallocated funds represent the amount of funds originally requested for the Energy Education Phase II Study which was subsequently not authorized in D.16-11-022, and is now unallocated to a specific study.									

	A	B	C	D	E
1	**SDG&E PY 2018 Energy Savings Assistance Program Annual Report**				
2	**ESAP Table 18**				
3	**Miscellaneous (2nd Refrigerators, Education Only, A/C Cycling, etc.)**				
4					
5	**Measures**	**Units**	**Received Refrigerator**	**Not eligible for Refrigerator due to Less than Six Occupants**	
6					
7	Second Refrigerators	Each	5	3	
8					
9					
10	**Measures**	**Units**	**Households that Only Received Education**		
11					
12					
13	In-Home Education	Home	0		
14					
15					
16	**Households for My Energy/My Account Platform**			**Households that Received ESA Program Measures and Elect to:**	
17	**Opt-Out**	**Already Enrolled**	**Opt-In**	**Opt-In to a New Program (DR or alternative tariff)**	
18	18,398	2,602	387		
19				NA	
20					
21					
22	**Households Received A/C Cycling Controls when A/C**				
23		# Installed			
24	A/C Cycling controls	NA			
25					

San Diego Gas Electric Company

SDG&E PY 2018 CARE Annual Report

CARE Table 1

Overall Program Expenses

Category	Overall Expenditures		Total	Authorized Budget[1]	% of Budget Spent	Total Shifted[2]	Shifted to/from?
	Electric	Gas					
Outreach[3]	$ 2,498,744	$ 228,830	$ 2,727,574	$ 3,327,551	82%		
Processing, Certification, Recertification	$ 555,333	$ 51,324	$ 606,657	$ 606,657	100%	$99,637	Shifted from General Admin
Post Enrollment Verification	$ 232,567	$ 21,600	$ 254,167	$ 356,501	71%		
IT Programming	$ 1,278,903	$ 119,899	$ 1,398,802	$ 1,661,365	84%		
Cool Centers	$ 37,600	$ 3,343	$ 40,943	$ 43,069	95%		
Pilots	$ 197,162	$ 18,643	$ 215,805	$ 262,500	82%		
Measurement & Evaluation	$ -	$ -	$ -	$ -	0%		
Regulatory Compliance[4 5]	$ 176,172	$ 15,872	$ 192,044	$ 247,184	78%		
General Administration[6]	$ 351,392	$ 30,237	$ 381,629	$ 720,132	53%	($99,637)	Shifted to Processing Certification, Recertification
CPUC Energy Division	$ 31,411	$ 2,984	$ 34,395	$ 56,712	61%		
TOTAL Program Costs	**$ 5,359,284**	**$ 492,731**	**$ 5,852,015**	**$ 7,281,672**	**80%**	**$0**	
CARE Rate Discount	$ 116,158,861	$ 10,006,738	**$ 126,165,599**	$ 73,102,151	173%	$ -	
Service Establishment Charge Discount	$ -	$ -	**$ -**	$ -	0%	$ -	
TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	**$ 121,518,145**	**$ 10,499,469**	**$ 132,017,614**	**$ 80,383,823**	**164%**	**$0**	

1. Reflects authorized funding approved in the CPUC Energy Division Disposition Letter dated 12/27/2018 approving SDG&E Advice Letter 3250-E/2688-G.
2. Reflects fund shift in accordance with the rules set forth in D. 08-11-031 as modified by D. 10-10-008, D. 10-16-11-022, and D 17-12-009, which granted the IOUs authority to shift funds between the CARE program categories.
3. Includes manual adjustment of ($19,688) related to the Medical Base Line Program.
4. Includes manual adjustment of ($30,609) for audit fees related to PY 2017.
5. Includes manual adjustment of ($20,000) for vendor disaggregation related to PY 2019.
6. Includes manual adjustment of ($5,642) for agency fees related to the Energy Efficiency System Support Programs.

San Diego Gas Electric Company

SDG&E PY 2018 CARE Annual Report

CARE Table 2

Enrollment, Recertification, Attrition, & Penetration

	New Enrollment										Recertification				Attrition (Drop Offs)					Enrollment		Total CARE Participants	Estimated CARE Eligible	Penetration Rate % (W/X)
	Automatic Enrollment				Self-Certification (Income or Categorical)					Total New Enrollment (E+J)	Scheduled	Non-Scheduled (Duplicates)	Automatic	Total Recertification (L+M+N)	No Response [4]	Failed PEV	Failed Recertification	Other	Total Attrition (P+Q+R+S)	Gross (K+O)	Net Adjusted (K-T)			
	Inter-Utility [1]	Intra-Utility [2]	Leveraging [3]	Combined (B+C+D)	Online	Paper	Phone	Capitation	Combined (F+G+H+I)															
January	0	253	0	253	2,842	2,085	0	397	5,324	5,577	2,561	839	3,249	6,649	2,357	181	161	1,571	4,270	12,226	1,307	298,295	321,323	93%
February	0	184	0	184	2,404	2,007	0	152	4,563	4,747	2,297	1,239	2,573	6,109	1,516	121	110	3,119	4,866	10,856	-119	298,176	321,323	93%
March	0	205	0	205	2,899	1,932	142	171	5,144	5,349	2,008	978	3,440	6,426	1,527	120	94	2,556	4,297	11,775	1,052	299,228	321,323	93%
April	0	149	0	149	2,493	1,640	159	159	4,451	4,600	2,192	840	2,768	5,800	542	92	98	4,909	5,641	10,400	-1,041	298,187	321,323	93%
May	0	87	0	87	3,275	1,946	225	127	5,573	5,660	2,522	822	3,701	7,045	1,144	65	119	3,111	4,439	12,705	1,221	299,408	321,323	93%
June	0	27	0	27	2,699	2,091	129	73	4,992	5,019	1,435	922	2,758	5,115	1,111	63	61	3,979	5,214	10,134	-195	299,213	321,323	93%
July	0	22	0	22	2,791	2,831	137	160	5,919	5,941	1,079	2,003	2,041	5,123	1,069	79	91	5,776	7,015	11,064	-1,074	298,139	321,323	93%
August	0	87	0	87	4,655	2,750	788	207	8,400	8,487	2,017	2,117	2,697	6,831	724	71	129	4,618	5,542	15,318	2,945	301,084	321,323	94%
September	0	151	0	151	3,007	1,817	201	208	5,233	5,384	1,443	1,747	2,432	5,622	670	52	95	4,799	5,616	11,006	-232	300,852	321,323	94%
October	51	188	0	239	2,517	1,795	75	208	4,595	4,834	2,002	1,403	2,799	6,204	966	60	105	6,129	7,260	11,038	-2,426	298,426	321,323	93%
November	1,224	245	0	1,469	2,595	2,004	282	245	5,126	6,595	1,735	1,212	3,557	6,504	1,608	39	103	9,017	10,767	13,099	-4,172	294,254	321,323	92%
December	4,631	115	0	4,746	2,209	1,677	156	282	4,324	9,070	2,187	1,555	3,958	7,700	1,322	84	123	4,692	6,221	16,770	2,849	297,103	321,323	92%
YTD Total	**5,906**	**1,713**	**0**	**7,619**	**34,386**	**24,575**	**2,294**	**2,389**	**63,644**	**71,263**	**23,478**	**15,677**	**35,973**	**75,128**	**14,556**	**1,027**	**1,289**	**54,276**	**71,148**	**146,391**	**115**	**297,103**	**321,323**	**92%**

[1] Enrollments via data sharing between the IOUs.

[2] Enrollments via data sharing between departments and/or programs within the utility.

[3] Enrollments via data sharing with programs outside the IOU that serve low-income customers.

[4] No response includes no response to both Recertification and Verification.

San Diego Gas Electric Company

SDG&E PY 2018 CARE Annual Report

CARE Table 3A - Post-Enrollment Verification Results (Model) 2018

Month	Total CARE Households Enrolled	Households Requested to Verify[1]	% of CARE Enrolled Requested to Verify Total	CARE Households De-enrolled (Due to no response)	CARE Households De-enrolled (Verified as Ineligible)[2]	Total Households De-enrolled[3]	% De-enrolled through Post Enrollment Verification[4]	% of Total CARE Households De-enrolled
January	298,295	1,770	0.59%	837	133	970	55%	0.33%
February	298,176	1,040	0.35%	520	91	611	0%	0.20%
March	299,228	1,146	0.38%	585	79	664	0%	0.22%
April	298,187	1,007	0.34%	476	64	540	54%	0.18%
May	299,408	1,104	0.37%	565	92	657	60%	0.22%
June	299,213	1,096	0.37%	384	65	449	41%	0.15%
July	298,139	1,409	0.47%	732	85	817	58%	0.27%
August	301,084	1,403	0.47%	889	67	956	68%	0.32%
September	300,852	1,151	0.38%	728	56	784	68%	0.26%
October	298,426	1,429	0.48%	877	76	953	67%	0.32%
November	294,254	1,143	0.39%	693	47	740	65%	0.25%
December	297,103	1,118	0.38%	0	29	29	3%	0.01%
YTD Total	**297,103**	**14,816**	**4.99%**	**7,286**	**884**	**8,170**	**55%**	**2.75%**

[1] Includes all customers who failed SDG&E's CARE eligibility probability model.

[2] Includes customers verified as over income or who requested to be de-enrolled.

[3] Verification results are tied to the month initiated and the verification process allows customers 90 days to respond to the verification request. Results may be pending due to the time permitted for a participant to respond.

[4] Percentage of customers dropped compared to the total participants requested to provide verification in that month.

SDG&E PY 2018 CARE Annual Report

CARE Table 3B Post-Enrollment Verification Results (Electric only High Usage)

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
January	298,295	422	0.14%	285	0	285	68%	0.10%
February	298,176	410	0.14%	291	0	291	71%	0.10%
March	299,228	217	0.07%	125	0	125	58%	0.04%
April	298,187	274	0.09%	165	0	165	60%	0.06%
May	299,408	134	0.04%	68	0	68	51%	0.02%
June	299,213	157	0.05%	81	0	81	52%	0.03%
July	298,139	213	0.07%	85	0	85	40%	0.03%
August	301,084	3,338	1.11%	2,369	0	2,369	71%	0.79%
September	300,852	5,517	1.83%	4,426	0	4,426	80%	1.47%
October	298,426	923	0.31%	472	0	472	51%	0.16%
November	294,254	642	0.22%	308	0	308	48%	0.10%
December	297,103	5,659	1.90%	2,368	1	2,369	42%	0.80%
YTD Total	**297,103**	**17,906**	**6.03%**	**11,043**	**1**	**11,044**	**62%**	**3.72%**

[1] Includes all participants who were selected for high usage verification process.

[2] Includes customers verified as over income, who requested to be de-enrolled, did not reduce usage, or did not agree to be weatherized.

[3] Medium (400%) and high usage (600%) customers are dropped at 60 days (2 or 3 bill cycles) for non-response to HUV (high usage income verification request). Additionally, 600% + users that have not reduced usage within the 60 day window (2 or 3 bill cycles) are removed from the program. Results may be pending due to the time permitted for a participant to respond.

San Diego Gas Electric Company

	A	B	C	D	E	F	G
1	**SDG&E PY 2018 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)	3,378,197	162,549	72,172	21,624	51	68,702
6	Percentage		100%	44%	13%	0%	42%
7							
8	[1] Includes sub-metered customers.						

San Diego Gas Electric Company

	A	B	C	D	E	F	G	H	I	J
1	**SDG&E PY 2018 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	18,048	0	18,048	12,646	0	12,646	70%	0%	70%
7	San Diego	294,632	8,643	303,275	278,226	6,231	284,457	94%	72%	94%
8	**Total**	**312,680**	**8,643**	**321,323**	**290,872**	**6,231**	**297,103**	**93%**	**72%**	**92%**
9										
10										
11	[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.									

San Diego Gas Electric Company

	A	B	C	D	E	F	G	H
1	**SDG&E PY 2018 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	298,295	2,976	1.0%	2,163	641	73%	0.21%
6	February	298,176	2,244	0.8%	1,569	460	70%	0.15%
7	March	299,228	3,396	1.1%	2,604	628	77%	0.21%
8	April	298,187	2,890	1.0%	2,017	633	70%	0.21%
9	May	299,408	2,053	0.7%	1,388	423	68%	0.14%
10	June	299,213	2,485	0.8%	1,180	404	47%	0.14%
11	July	298,139	3,204	1.1%	2,231	637	70%	0.21%
12	August	301,084	2,783	0.9%	1,785	749	64%	0.25%
13	September	300,852	2,628	0.9%	1,736	682	66%	0.23%
14	October	298,426	3,078	1.0%	2,026	868	66%	0.29%
15	November	294,254	3,681	1.3%	2,300	953	62%	0.32%
16	December	297,103	4,124	1.4%	1,460	81	35%	0.03%
17	**YTD**	**297,103**	**35,542**	**11.96%**	**22,459**	**7,159**	**63%**	**2.41%**
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 5,924 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 closed.							

San Diego Gas Electric Company

	A	B	C	D	E	F	G	H	I
1	**SDG&E PY 2018 CARE Annual Report**								
2	**CARE Table 7**								
3	**CARE Capitation Contractors**								
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			39	1,679	1,718	$ 34,360
7	ALLIANCE FOR AFRICAN ASSISTANCE		X			-	7	7	$ 140
8	AMERICAN RED CROSS WIC		X	X		2	45	47	$ 940
9	CATHOLIC CHARITIES		X			-	3	3	$ 60
10	CHULA VISTA COMMUNITY COLLABORATIVE		X			3	251	254	$ 5,080
11	COMMUNITY RESOURCE CENTER		X			-	8	8	$ 160
12	DEAF COMMUNITY SERVICES		X			-	-	-	$ -
13	HEARTS AND HANDS TOGETHER		X			-	1	1	$ 20
14	HORN OF AFRICA		X			-	-	-	$ -
15	INTERFAITH COMMUNITY		X			-	4	4	$ 80
16	LA MAESTRA FAMILY CLINIC		X			-	44	44	$ 880
17	MAAC PROJECT - CARE		X		X	-	49	49	$ 980
18	NEIGHBORHOOD HEALTH CARE		X			-	11	11	$ 220
19	NEIGHBORHOOD HEALTH INSURANCE CENTER	X				-	1	1	$ 20
20	NORTH COUNTY HEALTH SERVICES		X			-	70	70	$ 1,400
21	SAN DIEGO STATE UNIVERSITY WIC		X			4	23	27	$ 540
22	SAN YSIDRO HEALTH CENTERS		X			-	-	-	$ -
23	SCRIPPS HEALTH WIC (SHW)		X			-	18	18	$ 360
24	UNION OF PAN ASIAN COMMUNITIES (UPAC)		X			-	-	-	$ -
25	VISTA COMMUNITY CLINIC		X			-	5	5	$ 100
26	**Total Enrollments and Expenditures**					**0**	**2,219**	**2,267**	**$ 45,340**
27									
28									
29	[1] All capitation contractors with current contracts are listed regardless of whether they have signed up customers or submitted invoices this year.								
30	[2] Enrollments reflect new enrollments only.								

San Diego Gas Electric Company

	A	B	C	D	E	F	G	H
1	**SDG&E PY 2018 CARE Annual Report**							
2	**CARE Table 8**							
3	**CARE Participants as of Month-End**							
4	**2018**	**Gas and Electric**	**Gas Only**	**Electric Only**	**Total**	**Eligible Households**	**Penetration Rate**	**% Change**
5	**January***	177,640	N/A	120,655	298,295	321,323	93%	5.71%
6	**February**	177,521	N/A	120,655	298,176	321,323	93%	-0.04%
7	**March**	178,091	N/A	121,137	299,228	321,323	93%	0.33%
8	**April**	177,555	N/A	120,632	298,187	321,323	93%	-0.32%
9	**May**	178,274	N/A	121,134	299,408	321,323	93%	0.38%
10	**June**	178,056	N/A	121,157	299,213	321,323	93%	-0.06%
11	**July**	177,451	N/A	120,688	298,139	321,323	93%	-0.33%
12	**August**	179,261	N/A	121,823	301,084	321,323	94%	0.92%
13	**September**	179,183	N/A	121,669	300,852	321,323	94%	-0.07%
14	**October**	177,750	N/A	120,676	298,426	321,323	93%	-0.76%
15	**November**	174,709	N/A	119,545	294,254	321,323	92%	-1.30%
16	**December**	176,820	N/A	120,283	297,103	321,323	92%	0.89%
17								
18	*In January 2018, SDG&E revised the methodology for determining CARE enrollment; therefore, the methodology change caused a discrepancy in the percentage change for the month of January.							

San Diego Gas Electric Company

	A	B	C	D
1	**SDG&E PY 2018 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	19.0	4.0	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	301	125	426
14	CARE	298	61	359
15				
16				
17	**Average Monthly Gas / Electric Bill[2]**			
18	**Residential Non-CARE vs. CARE Customers[1]**			
19	**(Dollars per Customer)**			
20	**Customer**	**Gas**	**Electric**	
21	Non-CARE	$30.12	$125.53	
22	CARE	$19.30	$58.13	
23				
24				
25	[1] Excludes master-meter usage.			
26	2 Average Monthly Gas/Electric Bill reflects residential Non-CARE (CARE) 2018 total billed.			

San Diego Gas Electric Company

	A	B	C	D	E	F
1	**SDG&E PY 2018 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	$1.83	$116	1.58%	$22,323,678	28.83%
8	Commercial	$18.36	$902	2.04%	$32,978,991	42.59%
9	Agricultural	$30.49	$1,177	2.59%	$1,445,804	1.87%
10	Large/Indust	$2,665.01	$72,986	3.65%	$20,677,829	26.71%
11						
12						
13						
14	**GAS**					
15	**CARE Surcharge and Revenue Collected by Customer Class**					
16					Total CARE	Percentage of
17	Customer	Average Monthly		CARE Surcharge	Surcharge Revenue	CARE Surcharge
18	Class	CARE Surcharge[2]	Monthly Bill	as Percent of Bill	Collected	Revenue Collected
19	Residential	$0.20	$28	0.72%	$1,637,142	42.86%
20	Commercial	$4.50	$279	1.61%	$1,625,342	42.55%
21	Natural Gas Vehicle	$375.06	$10,308	3.64%	$170,650	4.47%
22	Industrial	$653.37	$5,827	11.21%	$386,798	10.13%
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.					

San Diego Gas Electric Company

	A	B	C	D	E	F
1	**SDG&E PY 2018 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	2,827	1,965	129	4	729
6	ALLIANCE FOR AFRICAN ASSISTANCE	16	10	1	0	5
7	AMERICAN RED CROSS	132	61	4	0	67
8	CATHOLIC CHARITIES	8	3	0	0	5
9	CHILDREN'S INITIATIVE	0	0	0	0	0
10	CHULA VISTA COMMUNITY COLLABORATIVE	55	22	4	0	29
11	COMMUNITY RESOURCE CENTER	7	4	0	0	3
12	CRISIS HOUSE	0	0	0	0	0
13	DEAF COMMUNITY SERVICES	0	0	0	0	0
14	FAMILY HEALTH CENTERS OF SAN DIEGO	1	0	0	0	1
15	HEARTS AND HANDS TOGETHER	7	1	0	0	6
16	HORN OF AFRICA	4	0	0	0	4
17	INTERFAITH COMMUNITY	6	5	0	0	1
18	LA MAESTRA FAMILY CLINIC	308	47	15	0	246
19	MAAC PROJECT - CARE	148	61	7	0	80
20	NEIGHBORHOOD HEALTH CARE	21	9	0	0	12
21	NEIGHBORHOOD HEALTH INSURANCE CENTER	1	1	0	0	0
22	NORTH COUNTY HEALTH SERVICES	243	75	26	0	142
23	SAN DIEGO STATE UNIVERSITY WIC	74	33	3	0	38
24	SAN YSIDRO HEALTH CENTERS	0	0	0	0	0
25	SCRIPPS HEALTH WIC (SHW)	29	20	1	0	8
26	VISTA COMMUNITY CLINIC	17	9	0	0	8
27	**Total**	**3,904**	**2,326**	**190**	**4**	**1,384**
28						
29						
30	[1] Includes sub-metered customers.					
31	[2] Includes new enrollments and recertification applications approved.					

San Diego Gas Electric Company

SDG&E PY 2018 CARE Annual Report

CARE Table 12

CARE Expansion Program

Participating Facilities by Month

2017	Gas			Electric		
	CARE Residential Facilities	CARE Commercial Facilities	Total Gas	CARE Residential Facilities	CARE Commercial Facilities	Total Electric
January	235	108	343	391	96	487
February	238	109	347	431	161	592
March	239	108	347	392	98	490
April	246	108	354	419	161	580
May	245	108	353	392	98	490
June	240	109	349	387	85	472
July	239	108	347	406	115	521
August	239	108	347	443	162	605
September	241	107	348	450	162	612
October	246	107	353	424	98	522
November	247	106	353	417	87	504
December	250	107	357	464	162	626

Average Monthly Gas / Electric Usage[1]

Customer	Gas	Electric
	Therms	KWh
Residential Facilities	33	486
Commercial Facilities	382	8,892

CARE Expansion Self-Certification and Self-Recertification Applications

	Received	Approved	Denied	Pending/Never Completed	Duplicates
Total	80	16	0	0	64
Percentage		20%	0%	0%	80%

[1] Excludes master meter usage.

San Diego Gas Electric Company

	A	B	C	D	E	F	G	H	I	J
1	**SDG&E PY 2018 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	17,906	11,043	1	1,380	49	42	1,289	58	2	20
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.									

San Diego Gas Electric Company

	A	B	C	D	E	F	G	H	I
1	**SDG&E PY 2018 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 who Accept ESA Program Treatment				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	2,641	NA	NA	NA	NA	NA	NA	NA	NA
8									
9									
10									
11	[1] Those CARE customers who have been on CARE rate at the same meter for a least six years.								
12	[2] Those CARE customers who have not participated in the ESA Program prior to receiving targeted marketing.								
13	3 SDG&E will implement "targeted marketing" to this group 2nd quarter 2019.								

San Diego Gas Electric Company

	A	B
1	**SDG&E PY 2018 CARE Annual Report**	
2	**CARE Table 14**	
3	**Categorical Enrollment**	
4	**Type of Enrollment**	**Number of Customer Enrollments[1]**
5	Bureau of Indian Affairs General Assistance	68
6	CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	18,982
7	CalWORKs/Temporary Assistance for Needy Families (TANF) [2]	2,692
8	Head Start Income Eligible - (Tribal Only)	400
9	Healthy Families A&B	0
10	Low-income Home Energy Assistance Program (LIHEAP)	3,579
11	Medicaid/Medi-Cal	48,215
12	National School Lunch Program (NSLP) - Free Lunch	14,016
13	Supplemental Security Income (SSI)	9,626
14	Tribal TANF [2]	0
15	Women, Infants, and Children Program (WIC)	10,198
16		
17		
18		
19	[1] Number of customers enrolled reflects categorical programs selected by customer. Customers may select more than one eligible program for a single account.	
20	[2] CalWORKS and Tribal TANF are combined categorical programs with no distinction between the two programs.	