Overview of Current CARE and ESA Programs

2015-2017 Low Income Application Public Input Meeting February 11, 2014

SDG&E connected

A Sempra Energy utility℠

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CARE Authorized Budget

Budget Category	2012	2013	2014	TOTAL
Outreach	$2,069,410	$2,283,171	$2,300,352	$6,652,933
Processing, Certification, Recert.	$629,215	$636,188	$643,206	$1,908,609
Post Enrollment Verification	$403,200	$403,200	$403,200	$1,209,600
IT Programming	$1,245,390	$1,224,036	$1,230,082	$3,699,509
Cool Centers	$56,000	$34,329	$35,985	$126,314
Pilots	$108,000	-	-	$108,000
Measurement & Evaluation	$42,500	$42,500	$42,500	$127,500
Regulatory Compliance	$154,917	$160,136	$165,362	$480,415
General Administration	$492,559	$505,430	$518,406	$1,516,395
CPUC Energy Division	$49,535	$53,002	$56,712	$159,249
SUBTOTAL MGMT COSTS	$5,250,725	$5,341,992	$5,395,806	$15,988,523
Subsidies & Benefits	$73,857,625	$82,630,988	$83,614,933	$240,103,546
TOTAL PROGRAM COSTS	$79,108,350	$87,972,980	$89,010,739	$256,092,069

ESA Program Authorized Budget

	2012	2013	2014	Total
Energy Efficiency (Measures)	$17,974,949	$18,480,995	$18,803,063	$ 55,259,006
Training Center	$0	$0	$0	$0
Inspections	$55,745	$57,475	$59,206	$ 172,426
Marketing & Outreach	$1,192,282	$1,153,740	$1,164,718	$ 3,510,741
Statewide ME&O	$60,000	$60,000	$0	$ 120,000
M&E	$190,000	$55,000	$115,000	$ 360,000
Regulatory Compliance	$306,554	$339,384	$322,214	$ 968,152
General Administration	$1,891,477	$1,948,947	$2,006,417	$ 5,846,841
Energy Division	$45,000	$45,000	$45,000	$ 135,000
Total Program Costs	$21,716,006	$22,140,542	$22,515,618	$ 66,372,165
NGAT (O&M)	$535,000	$535,000	$535,000	$1,605,000

Program Goals

- Homes Treated

ESA Program	2012	2013*	2014	Total
Goal	20,316	20,316	20,316	60,948
Actual	22,415	17,976	N/A	40,391

*Final program numbers will not be available until end of March.

- Penetration Rate

CARE	2012	2013	2014
Goal	90%	90%	90%
Actual	85%	84.6%	N/A

- Implemented the CARE High Usage Process for Customers

- Increased capitation fee from "up to $15" to "up to $20" for each new CARE enrollment

- Implemented two paperless initiatives to conduct ESA Program enrollments and assessments

- Added the smart power strip as a new measure in the ESA Program

- Changed criteria for refrigerator replacement from pre 1993 to pre 1999

- Increased the number of measures an Outreach and Assessment contractor may install on the first visit

- Implemented the integrated online enrollment process for CARE and the ESA Program.
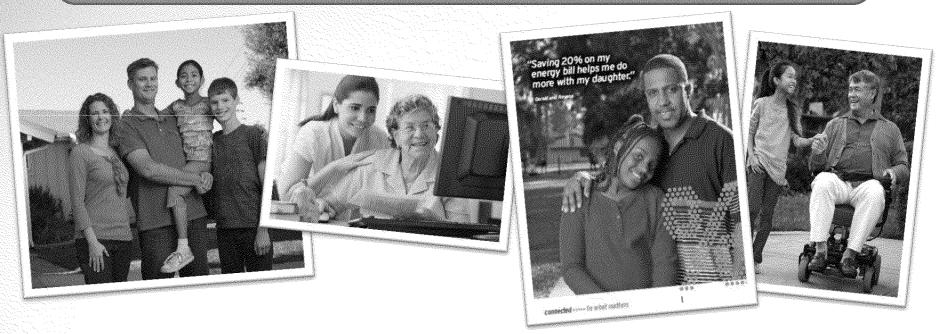
- New channels to enroll customers on CARE

- A Training component for the ESA Program contractors

- More paperless processes for the ESA Program

- New measures to add to ESA Program

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2013 Foundational Platform

Connecting customers to energy saving solutions to help them save money and energy

Customer Assistance

SDG&E offers bill assistance solutions to help qualified customers.

1 CARE

Provides a discount of 20% on your energy bill

2 Energy Savings Assistance Program

Provides free home improvements and appliance repair or replacement

3 Medical Baseline

Provides an average of $33 savings per month to households with a member who has a medical condition requiring extra energy use

ENERGY SAVING SOLUTIONS: CONNECT US TO SOMEONE IN NEED
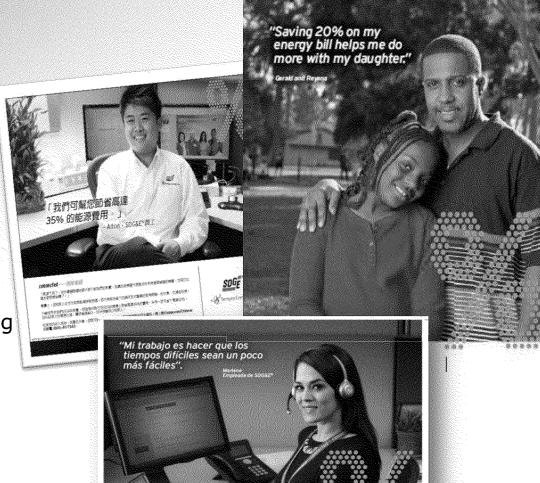
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•**Collateral**

- – Brochures

- – Flyers & Posters

- – Program Fact Sheets

- – Customer Letters

- – Application Forms

- – Online Materials

- – Translated Materials

  - • 12 languages
  - • *Arabic, Armenian, Chinese, English, Farsi, Hmong, Khmer, Korean, Russian, Spanish, Tagalog and Vietnamese*

•Messaging

- Direct Mail Campaigns

- Online Campaigns

  - Customer E-Mails
  - Banner Ads

- Customer Testimonials

- Automated Voice Messaging

- SDG&E website

"Saving 20% on my energy bill helps me do more with my daughter."

Gerald and Royana

「我們可幫您節省高達35% 的能源費用.」
– Alton, SDG&E™員工

"Mi trabajo es hacer que los tiempos difíciles sean un poco más fáciles".

Marlene, Empleada de SDG&E™

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Energy Solutions Partner Network

- **CARE Partners** (Capitation Agencies)
  - Network of about 80 community-based organizations
  - Provide constituents with direct services
  - Provided incentives based on number of CARE enrollments

- **Community Based Partners**
  - Network of nearly 200 diverse, "neighborhood" organizations
  - Regional partners serving audiences including:
    - Seniors
    - Disabled & Special Assistance
    - Veterans
    - Multicultural/Multilingual
    - Income-Challenged

Engage customers at events, presentations and informational sessions/workshops
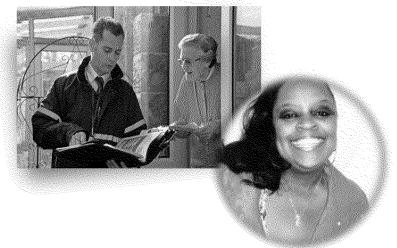*Promote offerings through e-blasts, newsletters, social media and more*

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Direct Connect Contractors

- **2-1-1 San Diego**
    - Connects people with health & wellness services through a free, confidential phone service and searchable online database
    - Processes over 30,000+ calls annually for SDG&E/utility needs
    - Enrolls customers in CARE and ESA
    - Distributes Medical Baseline applications
    - Refers calls to agencies for Neighbor-to-Neighbor and LIHEAP programs

- **The Harris Group**
    - Door-to-door outreach contractor
    - Targeted zip code outreach
    - Enroll customers in CARE and ESA

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Special Initiatives

- **Community Fire Safety Program**
  - Extensive visibility at fire and police stations
  - Roundtable with Extra Assistance Partners
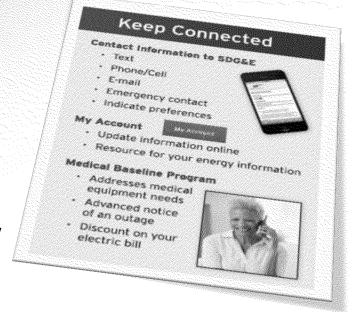 - Featured Medical Baseline program

- **Multicultural/Multilingual – The Harris Group**
  - Over 300 community events & presentations annually
  - Focused efforts with groups including:
    - Churches/Religious Leaders
    - Seniors & Special Needs
    - Veterans

- **Cool Zones**
  - Partnership with County of San Diego
  - Runs June – October
  - Over 100 locations county-wide
  - Offers program applications & information

For a Cool Zone site near you, call AIS at **1-800-510-2020** and press "6" or visit us at sdge.com/czonesites

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Customized Campaigns

- **SDG&E Branch Office Engagement**
  - Year-round effort with team at all Branch Office locations
  - Focused on enrollments in CARE, ESA and Medical Baseline

- **Community "Energy Saving Solutions" Tailgates**
  - Partnered with community based organizations & SDG&E Branch Office locations
  - Capitalized on highest traffic days
  - Focused on enrollments in CARE, ESA and Medical Baseline
  - Additional offerings like Watering Savings and Lighting kits

- **Energy Savings Solutions Tailgates for Employees**
  - Quarterly events at SDG&E campuses
  - Employees nominate groups in which to connect
  - Become ambassadors for the program

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Customer Outreach & Engagement

- **Opportunities**

  - *Staying on top of changing program guidelines*

    - *Costs to change all collateral and applications*
    - *Costs to educate/train partners*

  - *Finding hardest to reach customers to enroll*

  - *Getting customers to bring correct documentation*

  - *Engaging in a cost-effective manner*