

CalSPREE Program- Energy Advisor
Attachment 3

Table A: Residential Energy Advisor Program Offerings by IOU

Offerings	SCE	SCG	PG&E	SDG&E
On-line Survey	Yes	Yes	Yes	Yes
Mail-in Survey	Yes	Yes	No	Yes
Telephone Survey	Yes	No	Yes	No
Multi-family Survey	Yes	Yes	Yes	Yes
In-Home Survey	Yes	No	Yes	No
Home Energy Reports	Yes	Yes	Yes	Yes
On-Line Buyer's Guide	Yes	Yes	Yes	Yes
Energy Kits	No	Yes	No	Yes

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Table B: Residential Energy Advisor Program Offerings by IOU

IOU	Total Residential Customers (2012)	Program Element	2013 Customer Participation Targets *	2014 Customer Participation Targets *	Total Participation Targets (13-14) **	Percent of all 2013 customers this represents	2013 Budget	2014 Budget	Total Budget	net TRC	gross TRC	Total Kwh	Total KW	Total therms		
PG&E	5,399,977	Home Energy Reports ***	1,000,807	1,000,807	1,000,807	18.53%	\$ 8,290,500	\$ 8,290,500	\$ 16,581,000		1.26	1.26	149,983,025	0	5,675,440	
		Home Energy Advisor-online	5,000	5,000	10,000	0.19%	\$ 2,621,698	\$ 2,995,880	\$ 5,617,578	NA	NA	NA	NA	NA	NA	
		Home Energy Advisor other (mail in, phone, in person)	NA	NA	NA	NA		\$ 1,178,544	\$ 1,178,544	\$ 2,357,088						
		Total for Energy Advisor	1,005,807	1,005,807	1,010,807	18.72%	\$ 12,090,742	\$ 12,464,924	\$ 24,555,666	0.85	0.85	149,983,025	0	5,675,440		
SCE	4,300,000	Home Energy Reports ***	65,000	0	65,000	1.50%	\$ 854,952	\$ 167,360	\$ 1,022,313	TBD	TBD	TBD	TBD	NA	NA	
		HEES Enhanced Mail-In Survey	75,000	75,000	150,000	3.50%	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	NA	NA
		Home Energy Advisor online	12,926	4,000	16,926	0.39%	\$ 951,551	\$ 213,634	\$ 1,165,184	0.11	0.15	621,184	288	NA	NA	
		Home Energy Advisor other (mail in, phone, in person)	16,385	14,800	31,185	0.73%	\$ 2,331,986	\$ 2,299,853	\$ 4,631,840	0.16	0.27	6,604,983	3,181	NA	NA	
		Total for Energy Advisor	169,311	93,800	263,111	6.12%	\$ 4,138,489	\$ 2,680,847	\$ 6,819,337	0.16	0.26	7,226,167	3,469	NA	NA	
SDG&E	1,235,022	Home Energy Reports ***	70,000	70,000	70,000	5.66%	\$ 1,112,027	\$ 1,112,027	\$ 2,224,054	NA	NA	NA	NA	NA	NA	
		Home Energy Advisor online	4,000	4,000	8,000	0.65%	\$ 410,056	\$ 410,056	\$ 820,112	NA	NA	NA	NA	NA	NA	
		Home Energy Advisor other (mail in, phone, in person)	NA	NA	NA	NA		Included in HEA online budget	Included in HEA online budget	Included in HEA online budget						
		Total for Energy Advisor	74,000	74,000	78,000	6.31%	\$ 1,522,083	\$ 1,522,083	\$ 3,044,166	NA	NA	NA	NA	NA	NA	
SCG	5,372,645	Home Energy Advisor online	10,000	10,000	20,000	0.37%	\$ 755,495	\$ 755,495	\$ 1,510,991	NA	NA	NA	NA	NA	NA	
		Home Energy Advisor other (mail in, phone, in person)	10,000	(See Note 2)	10,000	.19%				NA	NA	NA	NA	NA	NA	
		Total for Energy Advisor	20,000	10,000	30,000	0.56%	\$ 755,495	\$ 755,495	\$ 1,510,991	NA	NA	NA	NA	NA	NA	
		Weekly Bill Tracker Alerts (See Note 3)	25,000	194,400	219,400	4.08%				NA	NA	NA	NA	NA	NA	
		Opower Home Energy Reports (See Note 3)	50,000	0	50,000	0.93%				NA	NA	NA	NA	NA	NA	
Total all IOUs	16,307,644	Home Energy Reports ***	1,185,807	1,070,807	1,185,807		\$ 10,257,479	\$ 9,569,887	\$ 19,827,367			149,983,025	-	5,675,440		
		Home Energy Advisor online	31,926	23,000	54,926		\$ 4,738,800	\$ 4,375,065	\$ 9,113,865			621,184	288	NA		
		Home Energy Advisor other (mail in, phone, in person)	26,385	14,800	31,185		\$ 3,510,530	\$ 3,478,397	\$ 6,988,928			6,604,983	3,181	NA		
		Total for Energy Advisor	1,269,118	1,183,607	1,381,918		\$ 18,506,810	\$ 17,423,349	\$ 35,930,159			157,209,192	3,469	5,675,440		

FOOTNOTES:

* Participation targets by year for Home Energy Reports include carry-over from customers still in treatment from prior years.

** Total participation target for Home Energy Reports is a measure of the total number of customers in the program in 2013 and 2014. Many of these customers are in treatment in both 2013 and 2014, therefore this total is NOT a sum of the individual years. This only applies to Home Energy Reports.

*** Home Energy Reports includes Opower Comparative Usage Reports as well as similar Residential offerings from other vendors.

PG&E NOTES

Customer defined as a Residential Account.

Home Energy Reports has been funded to enroll up to 1,000,000 residential customers through 2014.

All budget and savings numbers are estimates and may change.

SCE NOTES

The budgets of Home Energy Reports for 2013 and 2014 cover the Opower only. The HEES Enhancement Mail-in Survey is still under development, no budget has been defined. The "Home Energy Advisor Other" includes the UAT enhancement, Mail-in, In-home, and Phone. The TRC for Home Energy Reports will be calculated after the ex post savings are verified.

SDG&E NOTES

Customer defined as a Residential Account.

(1) As filed in the Energy Advisor PIP [3201] the annual goal for Energy Advisor was set as a total minimum goal, not separated by online, mail-in, phone, etc. The objective is to achieve the goal more through online than any other channel given the interactive nature of the new integrated audit tools; however if the goal is achieved through multiple channels (e.g. online and mail-in) then the IOUs will be satisfied, but would hope to exceed the annual goal if possible.

(2) The mail-in survey is being offered as an option for non-English speaking customers or that are uncomfortable completing the Universal Audit Tool online. The mail-in survey does not have a separate goal, the main objective is to offer customers another option to complete the UAT that they feel comfortable with and meets their needs.

(3) There are currently no savings or TRC associated with this program as it is undergoing an ex-post measurement evaluation to determine the savings that should be associated with this program which will be used to develop work papers and calculate at TRC value.

SCG NOTES

Customer defined as active meters.

(1) As filed in the Energy Advisor PIP [3701] the annual goal for Energy Advisor was set as a total minimum goal, not separated by online, mail-in, phone, etc. The objective is to achieve the goal more through online than any other channel given the interactive nature of the new integrated audit tools; however if the goal is achieved through multiple channels (e.g. online and mail-in) then the IOUs will be satisfied, but would hope to exceed the annual goal if possible.

(2) The mail-in survey is being offered as an option for customers who are unable or uncomfortable going online to use the interactive audit tool. The mail-in survey does not have a separate goal, but is rather going to be used for measurement and evaluation of the effectiveness of online versus mail-in channels, and will also be providing in-language surveys for hard-to-reach customer segments.

(3) These projected targets are being pursued through the Advanced Meter Initiative for 2013/2014 Heating Season. The targets established through the Weekly Bill Tracker and OPower Home Energy Reports seek to meet at least 5% of SoCalGas' residential customers.