BEFORE THE PUBLIC UTILITIES COMMISSION
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MONTHLY REPORT OF SAN DIEGO GAS & ELECTRIC COMPANY (U 902 M) ON LOW-INCOME ASSISTANCE PROGRAMS FOR AUGUST 2019

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This is the eighth monthly report for program year (PY) 2019. The purpose of this report is to consolidate activity for the California Alternate Rates for Energy (CARE) Program and Energy Savings Assistance (ESA) Program and provide the California Public Utilities Commission's (CPUC or Commission) Energy Division with all the necessary information to assist in analyzing the low-income programs.

This report presents year-to-date ESA Program and CARE Program results and expenditures through August 2019 for San Diego Gas & Electric Company (SDG&E).

Respectfully Submitted
on behalf of San Diego Gas & Electric Company,

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September 23, 2019

San Diego Gas & Electric Company

Energy Savings Assistance Program (ESA) Program

And

California Alternate Rates for Energy (CARE)

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ENERGY SAVINGS ASSISTANCE PROGRAM MONTHLY REPORT

1. ESA PROGRAM EXECUTIVE SUMMARY

1.1 ESA Program Overview

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

ESA Program Summary through August 2019			
	2019 Authorized / Planning Assumptions	**Actual to Date[1]**	**%**
Budget[2]	$34,652,791	12,129,651	35%
Homes Treated[3]	22,641	7,486	33%
kWh Saved	6,880,000	2,524,609	37%
kW Demand Reduced	3,954	1,759	44%
Therms Saved	400,000	21,319	5%
GHG Emissions Reduced (Tons)	6,124	1,513	25%

1.2 ESA Program Customer Outreach and Enrollment Update

1.2.1 Provide a summary of the ESA Program outreach and enrollment strategies deployed this month.

Below is a summary of ESA Program specific efforts conducted in August. Joint CARE and ESA Programs marketing, education and outreach efforts are provided in section 1.2.2 below.

[1] Energy, demand, emissions savings reflects total savings from program including California Department of Community Services and Development (CSD) leveraging and multifamily common area measure installations. Through July, there has been no measure installations for CSD leveraging or multifamily common area

[2] Budget authorized in CPUC approval of SDG&E Advice Letter 3250-E/2688-G dated December 27, 2018 for program years 2019 and 2020.

[3] Includes total homes treated including CSD leveraging. Multifamily common area properties will be tracked separately once implemented

ESA Program Contractor Outreach

SDG&E's Outreach and Assessment (O&A) Contractors canvas targeted neighborhoods to enroll customers in the ESA Program. In August, door-to-door canvassing from SDG&E's largest O&A contractor resulted in 915 ESA Program leads and 913 enrollments. Overall, ESA Program marketing, education and outreach efforts were successful in creating 5,518 leads and 1,302 enrollments for the month of August.

Single-Family Affordable Solar Housing (SASH) Program

SDG&E works with GRID Alternatives to enroll customers in the ESA Program based on participation in the SASH Program. Once approved, contractors install all feasible ESA Program measures in the home prior to the SASH Program's installation of a solar system. In August, the ESA Program did not receive a list of participants from the SASH Program. SDG&E continues to reach out to GRID to support this initiative.

Additionally, D.16-11-022 required the utilities to provide GRID Alternatives with information on CARE high energy usage (HEU) customers who have participated in the ESA program. In August, SDG&E provided GRID Alternatives with 13 leads for this effort.

ESA Program Multifamily Common Area Measure (MF CAM) Initiative

In August 2019, SDG&E's ESA Program MF CAM implementor, Willdan, continued targeted marketing to potential ESA MF CAM properties, including re-

syndication projects in SDG&E's service territory. In August, SDG&E's CAM implementer continued with four Energy Assessments/Audits and completed measures installations at five qualified properties; funds spent should appear in the September monthly report. There are a total of 17 properties pending Energy Assessments/Audits. In addition, Willdan Energy has identified other potential properties that have been scheduled for assessments in the month of August 2019.

For information on the MF CAM initiative, go to SDG&E's website page at https://www.sdge.com/businesses/savings-center/esa-common-area-measures-program to get a description of the MF CAM initiative, eligibility requirements, program flow, and contact information for Willdan Energy, SDG&E's implementor.

Language Line

Language Line® is utilized to make sure customers with limited English proficiency (LEP) have a channel in which to communicate with ESA Program contractors in the language of their preference. In August, 8 customers were served by the Language Line.

Language	**Calls**
Arabic	3
Vietnamese	1
Spanish	4
TOTAL	8

1.2.2 Customer Assistance Marketing, Education and Outreach for the CARE and ESA Programs.

Marketing, Education and Outreach activities summarized below represent joint efforts on behalf of the CARE and ESA Programs. SDG&E utilizes an integrated marketing, education and outreach strategy by connecting with customers using general awareness marketing, direct marketing, and community outreach and engagement. The 2019 campaign's intent is to make a connection with customers in order to drive conservation and provide monthly savings on their energy bill. The campaign runs in English, Spanish and Asian languages and includes TV, newspaper, digital (including paid search), email, direct mail and bill inserts, as well as a robust outreach program.

General Awareness Marketing

General awareness marketing allows SDG&E to connect with its customers through mass media efforts reaching both mass audiences and hard-to-reach populations including customers in rural areas, seniors, customers with special needs and multilingual/multicultural customers. The tactics for August 2019 are summarized in the following sections:

Print Advertising:

SDG&E is running English print in rural communities and African-American publications. In-language print in Chinese, Vietnamese, Tagalog (Filipino) and Spanish language publications began in March. The 2019 print campaign will continue running through December 2019.

Online Advertising:

In 2019, SDG&E continued its digital advertising campaign. In August, paid search advertising garnered 42,947 impressions with 8,770 customers clicking through to the CARE/ESA Programs online enrollment application. Banner ads contributed 1,179,591 impressions with 3,185 clicks. Paid social media garnered 620,963 impressions with 3,250 clicks. Pre-roll video contributed 277,275 impressions with 873 clicks.

Social Media:

Using e-newsletters, website posts and social media channels, the Energy Solutions Partner Network shared 11 CARE and ESA Program messages to an audience of more than 8,400 followers. SDG&E's social media profile also posts messaging to an audience of more than 48,000 followers. These followers are then able to redistribute the messages to their own networks on social media.

Direct Marketing

SDG&E continues its direct marketing campaign which allows SDG&E to connect with individual customers through targeted tactics including direct mail, e-mail, live calls, and outbound calling.

In August 2019, direct marketing efforts included the following tactics:

<u>Live CARE Call Campaign:</u>

SDG&E's third-party contractor, The Harris Group (THG), called targeted

customers to enroll in the CARE Program and to promote the ESA Program.[4]

The campaign provides SDG&E with a way to directly connect with customers in the low-income and hard-to-reach areas. The Harris Group provides education about the CARE and ESA Programs and assist customers in completing program application forms. Outbound call activities in August 2019 generated the following numbers:

The Harris Group	
ESA Leads	0
CARE Enrollments	3,514
CARE Recertifications	647

Email:

SDG&E sent 3,893 ESA Program promotional emails to potential ESA-eligible customers enrolled in CARE to introduce the customers to the ESA program and encourage them to apply online. SDG&E adjusted the creative materials for this campaign by having the email link directly to an ESA Program outreach contractor. Customers who clicked through would be connected by telephone and/or online calling to a contractor. This adjustment was made to help streamline the qualified lead process. Over the course of the month, there was an average open rate of 42% and a 4.34% click through rate[5].

[4] THG is a Diverse Business Enterprise (DBE) vendor and a woman-owned business.
[5] Per the 2018 IBM Watson Marketing Cloud Benchmark Study, 2018 baseline averages for email metrics for the utility segment are: 28.4% Open Rate (recipients who open an email) and 3.2% Click Through Rate (recipients who click through to the offer).

Direct Mail

SDG&E sent an ESA Program promotional postcard to 942 recently enrolled CARE customers to inform them that they may qualify for the ESA Program. The postcard encourages CARE customers to contact an authorized ESA Program outreach contractor for more information and/or to schedule an appointment.

Community Outreach & Engagement

Energy Solutions Partner Network:

SDG&E works closely with a network of over 190 community-based organizations (CBOs) to connect customers to the CARE and ESA Programs. These organizations represent the diversity of SDG&E's customers within its service area. A majority of these organizations are small, grassroots agencies serving customers that are multicultural/multilingual, seniors, veterans, special needs, and limited English proficient (LEP) audiences. These partners help educate and enroll customers in low-income programs utilizing a variety of tactics including messaging through e-mail and social media channels such as Facebook, Twitter, and Instagram, posting information on their websites, providing booth space at events, and hosting enrollment day fairs at their locations. In August 2019, SDG&E's partner outreach activities resulted in the following activities:

Energy Solutions Partner Network	
ESA Leads	3
CARE Enrollments	15
CARE Recertifications	35

Partner Spotlight:

In August 2019, the SDG&E Customer Solutions Outreach Team participated in 82 events, presentations and trainings/workshops that featured information and enrollment in energy solutions programs, services and tools. Outreach activities were focused around engaging customers with solutions such as the CARE and ESA Programs.

On August 8, SDG&E presented to Park Avenue Senior Center, in Escondido on Customer Assistance and other programs offered by the company. This engaged group had many questions regarding Customer Assistance and time-of-use. The SDG&E representative stayed after the presentation to help fill out CARE applications for those that were interested.

In August, SDG&E with the Metropolitan Area Advisory Council (MAAC) a LIHEAP agency, CARE Capitation partner, and Energy Solutions Partner expanded their partnership to provide education on TOU and programs to LIHEAP recipients. Customers attended a two hour session to receive the LIHEAP assistance. SDG&E presented at multiple sessions throughout the month with anywhere from 15 to 20 customers that attend these sessions. The SDG&E representative is also training MAAC staff to provide the information to their clients. Every eligible customer who attends this session will also be signed up for CARE and ESA.This is a great collaboration with MAAC to get the Customer Assistance and time-of-use information to the perfect target audience.

Multicultural Outreach:

To continue efforts to reduce potential barriers for customers in the rural, multicultural/multilingual and special needs customer segments, as well as

to increase education and program enrollments, SDG&E pairs multicultural contractors with employees that are fluent in various languages to help staff events and presentations. These contractors are fluent in the following languages: Spanish, Vietnamese, Chinese, Tagalog, Aramaic/Arabic, American Sign Language, and other languages as requested. During August 2019, SDG&E completed 83 outreach events. A summary of these activities is listed below:

Date	Location	Partner / Hosting Organization	Event Title
8/1/2019	Fairbanks Ridge 16016 Babcock Street San Diego, CA 92127	Pacific Southwest Community	Farmers Market
8/1/2019	Belmont Park 3146 Mission Blvd. San Diego, CA 92109	iHeart	Stay Out + Play Out
8/1/2019	Rodeo Grounds/Outdoor Community Center 431 Aqua Lane Ramona, CA 92065	Ramona Chamber	Ramona Fair
8/1/2019	Pantoja Park 524 West G St. San Diego, CA 92101	Movies in the Park	Willy Wonka & the Chocolate Factory (1971)
8/2/2019	Tecolote Community Park 4675 Tecolote Rd. San Diego, CA 92110	Movies in the Park	Guardians of the Galaxy Vol. 2
8/2/2019	Spring Valley County Park 8735 Jamacha Blvd. Spring Valley, CA 91977	Movies in the Park	The Goonies
8/2/2019	Carmel Valley Community Park 25 Ford Rd. Carmel Valley, CA 93924	Movies in the Park	How to Train Your Dragon
8/2/2019	Juniper Gardens Apartments 4251 Juniper Street Suite 100 San Diego, CA 92105	Wakeland Housing and Development Corporation	Resource Fair

Date	Location	Partner / Hosting Organization	Event Title
8/2/2019	Rodeo Grounds/Outdoor Community Center 431 Aqua Lane Ramona, CA 92065	Ramona Chamber	Ramona Fair
8/3/2019	Tierra Santa Library 4985 La Cuenta Dr. San Diego CA 92124	Cool Zone	Cool Zone
8/3/2019	Rodeo Grounds/Outdoor Community Center 431 Aqua Lane Ramona, CA 92065	Ramona Chamber	Ramona Fair
8/3/2019	Poway Swim Center 13094 Civic Center Dr. Poway, CA 92064	Movies in the Park	How To Train Your Dragon: The Hidden World
8/3/2019	Kate O. Sessions Neighborhood Park 5115 Soledad Rd. San Diego, CA 92109	Movies in the Park	Finding Dory
8/3/2019	Montgomery Waller Community Park Otay Mesa, CA	Movies in the Park	Spider-Man: Into the Spider Verse
8/4/2019	Rodeo Grounds/Outdoor Community Center 431 Aqua Lane Ramona, CA 92065	Ramona Chamber	Ramona Fair
8/5/2019	Torrey Highlands 13370 Torrey Meadows Drive San Diego, CA 92129	Pacific Southwest Community	Farmers Market
8/5/2019	Seabreeze Farms 12759 Seabreeze Farms Drive San Diego CA 92130	Pacific Southwest Community	Farmers Market
8/6/2019	4060 Fairmount Ave. San Diego CA 92105	La Maestra	Health Fair
8/6/2019	South Bay Recreation Center 1885 Coronado Ave. San Diego, CA 92154	SDPD Southern Division	National Night Out
8/6/2019	13396 Salmon River Road San Diego, CA 92129	SDPD Northeastern	National Night Out
8/6/2019	East Valley Community Center 2245 E. Valley Pkwy Escondido, CA 92027	Escondido Police Department	National Night Out

Date	Location	Partner / Hosting Organization	Event Title
8/6/2019	Kimball Park E. 12th St. and D Ave. National City, CA	National City Police Department	National Night Out
8/6/2019	Alpine Sheriffs Station 2751 Alpine Blvd. Alpine CA	Alpine Sheriffs Dept.	National Night Out
8/7/2019	Educational Cultural Complex 4343 Ocean View Blvd. San Diego, CA 92113	SDCEats	Community Health Event
8/7/2019	San Marcos Senior Activity Center 111 Richmar Ave. San Marcos CA 92069	City of San Marcos	Senior Center
8/7/2019	Island Village 1245 Market St. San Diego, CA 92101	Anthem Blue Cross	Resource Fair
8/8/2019	Bayview Hills 1876 Sky Harbor Dr. San Diego CA 92139	YMCA	Neighborhood Food Exchange
8/9/2019	Berry Street Park 7071 Mt. Vernon Lemon Grove, CA 91945	Movies in the Park	Aquaman
8/9/2019	Fallbrook Community Center 341 Heald Lane Fallbrook, CA 92028	Movies in the Park	How to Train Your Dragon: The Hidden World
8/9/2019	Robert Egger Sr. South Bay Community Park 1885 Coronado Ave. San Diego, CA 92154	Movies in the Park	Ralph Breaks the Internet
8/9/2019	4s Ranch 16118D 4S Ranch Parkway San Diego, CA 92127	Movies in the Park	How to Train Your Dragon: The Hidden World – 4S Ranch
8/10/2019	CA Center for the Arts 340 N. Escondido Blvd. Escondido CA	Mexihco	Tierra Caliente
8/10/2019	Valley Center Middle School 28102 N Lake Wohlford Rd, Valley Center, CA 92082	SDG&E	SDG&E Wildfire Mitigation & Resiliency Open House
8/10/2019	La Mesa PD parking lot 8085 University Ave. La Mesa CA	La Mesa Police Dept.	La Mesa Police Dept. Safety Fair

Date	Location	Partner / Hosting Organization	Event Title
8/10/2019	Golden Hill Community Park 2600 Golf Course Dr. San Diego, CA 92102	Movies in the Park	Spider-Man: Into the Spider Verse
8/10/2019	Brengle Terrace Park (Softball Field) 1200 Vale Terrace Dr. Vista, CA 92084	Movies in the Park	How To Train Your Dragon: The Hidden World
8/10/2019	Rolling Hills Neighborhood Park 11171 Almazon St. San Diego, CA 92129	Movies in the Park	Ralph Breaks the Internet
8/10/2019	Kimball Park E 12th St. National City, CA 91950	National City Chamber of Commerce	Automobile Heritage Day Festival & Car Show
8/12/2019	The Crossings 13533 Zinnia Hills Place San Diego, CA 92130	Pacific Southwest Community	Farmers Market
8/15/2019	Windwood Village 12730 Briarcrest Place San Diego, CA 92130	Pacific Southwest Community	Farmers Market
8/15/2019	Belmont Park 3146 Mission Blvd. San Diego, CA 92109	iHeart	Stay Out + Play Out
8/15/2019	The California Center For the Arts 340 N Escondido Blvd. Escondido, CA 92025	Classic Academy	JumpStart Conference
8/16/2019	Robb Field 2525 Bacon St. San Diego, CA 92107	Movies in the Park	How to Train Your Dragon
8/16/2019	MacArthur Park 4900 Memorial Drive La Mesa, CA 91942	Movies in the Park	Mary Poppins Returns
8/16/2019	Point Loma Community Park 1049 Catalina Blvd. San Diego, CA 92107	Movies in the Park	The Sandlot
8/16/2019	Otay Lakes County Parks 2270 Wueste Road Chula Vista CA 91915	Movies in the Park	The Lego Movie 2: The Second Part
8/17/2019	USS Midway Museum 910 N. Harbor Dr. San Diego, CA 92101	Movies in the Park	The Little Mermaid

Date	Location	Partner / Hosting Organization	Event Title
8/17/2019	La Jolla Community Park 615 Prospect St. San Diego, CA 92037	Movies in the Park	Finding Nemo
8/17/2019	Balboa Park Morley Field 2221 Morley Field Drive San Diego, CA 92104	Movies in the Park	Goosebumps 2: Haunted Halloween
8/17/2019	Old Poway Park	Movies in the Park	The Goonies
8/17/2019	Between 25&27th Imperial 2501 Imperial Avenue San Diego, CA 92102	Logan Heights CDC	Imperial Avenue Street Festival
8/17/2019	Bayside Park 999 Bayside Pkwy Chula Vista, CA 91910	City of Chula Vista	Green Zone Harbor Fest
8/19/2019	Fairbanks Square 16050 Potomac Ridge Road San Diego, CA 92127 (across from Del Norte High School)	Pacific Southwest Community	Farmers Market
8/19/2019	The Boys and Girls Club 1 Positive Pl. San Marcos, CA 92069	NCHS/North County Boys and Girls Club	Back to School Bash
8/19/2019	Fairbanks Terrace 16325 Paseo Del Sur San Diego, CA 92127	Pacific Southwest Community	Farmers Market
8/20/2019	Versa at Civita 2365 Via Alta San Diego CA 92108	Pacific Southwest Community	Farmers Market
8/22/2019	Santee Town Center Community Park East 550 Park Center Dr. Santee, CA 92071	City of Santee	Santee Summer Concerts
8/22/2019	Silvercrest Oceanside 3839 Lake Blvd. Oceanside, CA 92056	Anthem Blue Cross	Resource Fair
8/22/2019	Murphy Canyon Housing 3293 Santo Road San Diego CA 92124	Armed Services YMCA	The Neighborhood Exchange Event
8/22/2019	Belmont Park	iHeart Radio	Belmont Park Stay Out/Play Out
8/23/2019	Prescott Promenade Downtown El Cajon	iHeart	El Cajon Dinner & a Concert

Date	Location	Partner / Hosting Organization	Event Title
8/23/2019	Mira Mesa Senior Center 8460 Mira Mesa Blvd. San Diego, CA 92126	Mira Mesa Senior Center	Summer Luau
8/23/2019	6899 Capri Dr San Diego, CA 92120	Jewish Family Services	Jewish Family Services Luau Cool Zone
8/23/2019	Horton Plaza Park 325 Broadway Ave. San Diego, CA 92101	Movies in the Park	Up
8/23/2019	Lindo Lake County Park 1660 Lindo Lane Lakeside, CA 92040	Movies in the Park	Smallfoot
8/23/2019	Pine Valley County Park 28810 Old Hwy. 80 Pine Valley, CA 91962	Movies in the Park	How to Train Your Dragon: The Hidden World
8/24/2019	RB Community Park 18448 West Bernardo Drive San Diego, CA 92127	Movies in the Park	Madagascar
8/24/2019	Junior Seau Beach Pier Amphitheater 300 North the Strand Oceanside, CA 92054	Movies in the Park	Aquaman
8/24/2019	Potrero County Park 24800 Potrero Park Drive Potrero, CA 91963	Movies in the Park	How to Train Your Dragon: The Hidden World
8/24/2019	Liberty Station 2875 Dewey Rd. San Diego 92106	SD Union Tribune	Festival of Books
8/24/2019	Ramona Community Center 434 Aqua Lane Ramona, CA 92065	SDG&E	SDG&E Wildfire Mitigation & Resiliency Open House
8/25/2019	Bethel Baptist Church 1962 N.Euclid Ave. San Diego. CA	Bethel Baptist Church	Project 10,000 Plus
8/26/2019	Villa Andalucia 6591 Rancho Del Sol Way San Diego, CA 92130	Pacific Southwest Community	Farmers Market
8/28/2019	San Diego Oasis' Lifelong Learning Center 5500 Grossmont Center Drive, Suite 325 La Mesa, CA 91942	San Diego Oasis	Taste of Oasis

Date	Location	Partner / Hosting Organization	Event Title
8/28/2019	The Auditorium at the Escondido Senior Center (a.k.a. Park Ave Community Center 210 E. Park Ave. Escondido, CA 92025	San Diego Oasis	Taste of Oasis
8/29/2019	Wendy Robinson 619-410-4742 wendy@sdfirerescue.org Carlos 619-851-4640	San Diego Fire Rescue Foundation	Back-to-School
8/29/2019	Belmont Park 3146 Mission Blvd. San Diego, CA 92109	iHeart	Stay Out + Play Out
8/30/2019	Salvation Army 648 3rd Ave. Chula Vista, CA	Anthem Blue Cross	Resource Fair
8/30/2019	Faultline Park 1433 Island Ave. San Diego, CA 92101	Movies in the Park	The Sandlot
8/30/2019	San Carlos Community Park 6445 Lake Badin Ave. San Diego, CA 92119	Movies in the Park	The LEGO Movie 2: The Second Part
8/30/2019	Liberty Station 2455 Cushing Rd. San Diego, CA 92106	Movies in the Park	Finding Dory
8/31/2019	Ocean Beach Elementary Joint Use 4741 Santa Monica Ave. San Diego, CA 92107	Movies in the Park	Dumbo 2019
8/31/2019	SDCCU Stadium 9449 Friars Rd. San Diego, CA 92108	iHeart	SkyShow

Other Customer Engagement Efforts

SDG&E has several other customer engagement efforts to educate, enroll, and provide direct service to its customers. These efforts include direct service from SDG&E's Customer Contact Center and Payment Offices, as well as the

distribution of materials through other SDG&E customer-facing groups/programs and field services teams.

SDG&E Customer Contact Center (CCC), Branch Offices and Payment Offices

SDG&E's CCC, Branch Offices and Payment Offices promote and offer the CARE and ESA Programs to potentially eligible customers. SDG&E also promotes these customer assistance solutions at its Authorized Payment Locations (APLs). Additionally, customer engagement events called Customer Solutions Tailgates are held at the Branch Office locations on a quarterly basis to help enroll customers.

In D.16-06-054,[6] SDG&E received Commission authorization for its CCC's Energy Service Specialists (ESSs) to enroll customers directly into the CARE Program over the telephone.

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

	CCC	**Branch Office**
ESA Leads	1	5
CARE Enrollments	20	309
CARE Recertifications	0	29

1.3 Leveraging Success Evaluation, Including CSD

1.3.1 Please provide a status of the leveraging effort with CSD. What new steps or programs have been implemented? What were the results in terms of new enrollments?

SDG&E has been working closely with local Low-Income Home Energy Assistance Program (LIHEAP) agencies to improve leveraging opportunities between CSD's LIHEAP and the ESA Program. SDG&E contracts with two local agencies offering Outreach and Assessments services to provide greater leveraging opportunities and provide customers with the benefits of both programs. In August, LIHEAP organizations enrolled 78 customers in the ESA Program.

As part of SDG&E leveraging agreement with San Diego County Water Authority (SDCWA), SDCWA reimburses SDG&E for water measures installed, as part of the ESA Program, in homes where customers have an active SDCWA account. In August, SDG&E submitted an invoice to SDCWA for $38,577 to cover 3,751 water related measures. This agreement will continue until December 31, 2020 or until SDCWA's funds are exhausted.

In 2018, SDG&E entered into an agreement with Moulten Nigel Water District (MNWD) to leverage installation of water savings measures similar to those for SDCWA. Further discussion has determined that the service territory shared between MNWD and SDG&E does not provide significant opportunity for the leveraging partnerships initially intended.

1.4 Workforce Education & Training (WE&T)

1.4.1 Please summarize efforts to improve and expand ESA Program workforce education and training. Describe steps taken to hire and train low-income workers and how such efforts differ from prior program years.

SDG&E began collaboration for an upcoming training to contractors, which will occur in mid-October. SDG&E will be offering additional NGAT training to all contractors interested in participating.

1.5 Miscellaneous

1.5.1 ESA Program Studies

According to the legislative mandate, the current Low-Income Needs Assessment (LINA) is scheduled to be completed by December 31, 2019. A competitive solicitation for a consultant to conduct the statewide study was completed in January 2018. Research Into Action is the consultant selected to undertake the evaluation. The draft research plan was presented in a public webinar on May 29, 2018, and the final research plan was completed in June 2018. During the subsequent months, the study team developed and refined data collection instruments, conducted customer and contractor surveys and interviews, and began analysis of the data. A draft report was provided to the study team to review on August 15, 2019 and is currently under review.

The current Impact Evaluation Study for the ESA Program has been underway since January 2017. Phase 1 results were delivered on March 31, 2018 and revised on June 6, 2018. Energy Division directed the investor-

owned utilities (IOUs) to use the Phase 1 results for the Low-Income Mid-cycle filing.

Additional analysis was completed during phase 2, which involved adding additional data and refining the analysis. The final results were presented in a webinar on April 8, 2019. The study is now complete. The results will be used to develop new ex ante savings estimates for program measures.

A competitive solicitation for the Non-Energy Benefits Study was initiated in March 2018. The work scope was approved by the statewide study team and the ESA Cost Effectiveness Working Group. The study objectives are to update the non-energy benefit values used in ESA cost effectiveness analyses and to provide a workbook with the calculations. Skumatz Economic Research Associates (SERA) was selected to conduct the study, and the kickoff meeting was held on August 24, 2018. The Study Team met bi-weekly during September and October to discuss status on the research and to plan a webinar to present the draft research plan. The webinar took place on October 12, 2018. During the subsequent months the study team worked with the consultant to produce a draft report and model. Draft deliverables were provided by the consultant at the end of April 2019, and the IOUs provided extensive comments and edits on these deliverables in early May. A revised set of deliverables was delivered in May 2019; however, additional edits were requested by the IOUs. Additional review and edit periods are taking place in June and July 2019. A stakeholder webinar was held on

August 2 to present the draft report. The final report, along with stakeholder comments, was posted on August 30, 2019. The study is now complete.

1.5.2 ESA Program Pilot

On May 3, 2018, SDG&E received approval of Advice Letter 3197-E/2655-G (AL) for the Programmable Communicating Thermostat (PCT or smart thermostat) Time-of-Use (TOU) Pilot, ordered in D.17-12-009. The goal of the pilot is to explore and evaluate whether a PCT paired with a mobile application impacts the behavior of high usage customers as they transition to TOU. The Pilot will have a Treatment Group, which will receive a smart thermostat and transition to TOU, and a control group, which will transition to TOU but will not receive the thermostat. All customers will receive three surveys and will be compensated for their participation in the pilot. The current Control group contains 89 customers and 48 customers in the Treatment group.

In July, SDG&E received a draft of the second survey which will be issued to customers during September or October. The later survey date is due to milder temperatures than expected in July. The evaluator and utilities believe that allowing the customer to experience warmer temperatures prior to the survey will may yield more valuable results as they would have experienced a greater impact of the TOU rate.

In early August, SDG&E PCT vendor, Ecobee, notified SDG&E that the smart thermostats installed as part of this PCT pilot were not operating with the Peak Relief functionality designed to help customers optimize the TOU rates. While issues were identified during the installation of the thermostats, resolutions appeared to be identified and SDG&E believed the thermostats were operating with Peak Relief, as intended. However, in mid-July it was determined that there were issues and Ecobee began pushing request to customers to update the thermostat firmware to Eco+. The notification occurred through the thermostats as well as through email notifications. Additional notifications were sent in August to customers who had not upgraded their devices with the new firmware. As of August, 39 of the 49 thermostats installed had been updated with the Eco+ firmware.

SDG&E and the IOUs have been working with the pilot evaluator to adjust surveys and the research plan for this unexpected issue. Customers will receive modified surveys in October and final surveys towards the end of 2019.

2. CARE EXECUTIVE SUMMARY

2.1 CARE Program Summary

2.1.1 Please provide CARE Program summary costs.

CARE Budget Categories	Authorized Budget[6]	Actual Expenses to Date	% of Budget Spent
Outreach	3,221,952	1,692,827	53%
Proc., Certification and Verification	512,090	408,889	80%
Post Enrollment Verification	360,066	174,176	48%
Information Tech./Programming	1,638,000	787,320	48%
Pilots-CHANGES	265,103	209,353	79%
Regulatory Compliance	348,031	113,014	32%
General Administration	781,092	298,769	38%
CPUC Energy Division Staff	57,279	42,617	74%
Cooling Centers	43,500	6,244	14%
Total Expenses	**7,227,114**	**3,733,208**	**52%**
Subsidies and Benefits	73,833,173	75,939,290	103%
Total Program Costs and Discounts	**81,060,287**	**79,672,499**	**98%**

2.1.2 Provide the CARE Program penetration rate to date.

CARE Penetration		
Participants Enrolled	Eligible Participants[7]	Penetration rate
297,084	319,125	93%

[6] Budget authorized in CPUC approval of SDG&E Advice Letter 3250-E/2688-G dated December 27, 2018 for program years 2019 and 2020

[7] On February 12, 2019, Pacific Gas and Electric Company (PG&E), on behalf of the IOUs filed the Annual Estimates of CARE Eligible Customers and Related Information. This number reflects SDG&E's CARE Eligible Participants for 2019. As reflected in filing A.14-11-007, et al., Annual CARE Eligibility Estimates.

2.2 Outreach

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

In August 2019, marketing and outreach efforts generated 7,620 completed CARE applications, and 3,147 new enrollments/recertifications for the program. Below is a summary of CARE specific outreach efforts. A summary of SDG&E's joint CARE and ESA Program marketing, education and outreach efforts are provided in Section 1.2.2.

Direct Marketing

Direct Mail

In August 2019, SDG&E continued its rate comparison campaign by mailing a comparison letter to 5,384 potential CARE customers. The letter compares a customer's yearly total 2018 bill cost to what it would have been had they been enrolled in CARE receiving an average discount of 30%. Customers are encouraged to call SDG&E's toll-free enrollment number or to apply through SDG&E's online application. The letter contributed to 3,147 CARE automated phone enrollments and online enrollments.

Email

In August 2019, SDG&E continued with its Rate Comparison Nurture Campaign. The Nurture Campaign sends a series of automated, pre-written messages over a specified period to move customers closer to conversion. Contacts receive messages based on behavioral triggers and may receive up to three messages

(including reminders) over a 30-day period, depending on engagement level. In August, the campaign was sent to 107,336 customers and generated a 29% open rate and a 4.71% click through rate over the course of the month.

SDG&E also sent recertification reminder emails to 4,691 CARE customers who were due to recertify within the next 60 days. SDG&E received an open rate of 52% for these emails, with a click through rate of 35.47%.

Community Outreach & Engagement

Community outreach & engagement efforts allow SDG&E to educate, connect and directly engage with customers in communities where they work and live. Outreach and engagement activities included events, presentations, workshops, trainings, partnerships with CBOs, and customized efforts.

CARE Partners (Capitation Agencies)

SDG&E partners with 20 social service agencies such as the WIC program, refugee assimilation organizations, 2-1-1 San Diego, and others to help enroll its hardest-to-reach customers. These organizations serve high-risk, low-income individuals and families with enrollment in state and federally funded assistance programs, including Cal Fresh, LIHEAP, Covered California, and California Lifeline. The partnering organizations are in diverse low-income communities serving multicultural/multilingual, seniors, veterans, special needs, and limited English proficient (LEP) audiences and provide multilingual staffing. During the

month of August, the following numbers were generated by the Capitation Agencies:

Capitation Agencies	
ESA Leads	0
CARE Enrollments	282
CARE Recerts	138

Cool Zones

SDG&E partners with the County of San Diego's Aging & Independent Services to promote 116 county facilities that customers can visit to beat the heat in extreme hot weather conditions during the months of May through October each year. In August, there were 25 Cool Zone informational events reaching over 827 people. The County of San Diego's Aging & Independent Services handled 25 Cool Zone calls and distributed 14 fans.

Women's Infant & Children Organizations

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

County Health and Human Service Agency Collaboration:

SDG&E collaborates with the County of San Diego Health and Human Services Agency (HHSA) to connect customers to programs like CARE. All field HHSA offices include a source coded CARE application in their new client intake packets. In August 2019, the following applications were received:

HSA	August	YTD
ESA Leads	0	0
CARE Enrollments	25	374
CARE Recerts	34	461

2.3 CARE Recertification Complaints

2.3.1 Report the number of customer complaints received (formal or informal, however and wherever received) about their CARE recertification efforts, with the nature of the complaints and resolution.

In August 2019, SDG&E did not receive any customer complaints regarding CARE recertification.

3. CHANGES REPORTING

In compliance with requirements outlined in D.12-12-011, SDG&E has updated CARE Table 10 information for the month of July 2019 and Table 11 for May 1, 2019 through July 31, 2019. August 2019 activity for Table 10, and Table 11 activity for August 1, 2019 through October 31, 2019, will be reported in a subsequent report.[8]

4. APPENDIX – ESA AND CARE PROGRAM TABLES

ESA Program - Table 1 - Program Expenses

ESA Program - Table 1A – Program Expenses Funded from 2009-2016 Unspent ESA Program Funds

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

ESA Program - Table 2A - Program Expenses & Energy Savings by Measures Installed

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

(CSD Leveraging)

ESA Program - Table 2B - Program Expenses & Energy Savings by Measures Installed (Multifamily Common Area Measures)

ESA Program - Table 3 - Average Bill Savings per Treated Home

ESA Program - Table 4a - Homes Treated

ESA Program - Table 4b - Homes Unwilling/Unable to Participate

ESA Program - Table 5 - Program Customer Summary

ESA Program - Table 6 - Expenditures for Pilots and Studies

ESA Program – Table 7 - Second Refrigerator, In-Home Education, MyEnergy/MyAccount Platform

CARE Program - Table 1 - CARE Overall Program Expenses

CARE Program - Table 2 - CARE Enrollment, Recertification, Attrition, and Penetration

CARE Program - Table 3a - CARE Post-Enrollment Verification Results (Model)

CARE Program - Table 3b - CARE Post-Enrollment Verification Results (High Usage)

CARE Program - Table 4 - Self Certification and Re-Certification

CARE Program - Table 5 - Enrollment by County

CARE Program - Table 6 - Recertification Results

CARE Program - Table 7 - Capitation Contractors

CARE Program - Table 8 - Participants as of Month End

CARE Program - Table 9 - Expenditures for the CHANGES Pilot

CARE Program - Table 10 - CHANGES One-On-One Customer Assistance Sessions

CARE Program - Table 11 - CHANGES Group Customer Assistance Sessions

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	**Energy Savings Assistance Program Table 1 - Expenses**												
2	**SDG&E**												
3	**August 2019**												
4		**Authorized Budget [1] [2]**			**Current Month Expenses [3]**			**Year to Date Expenses**			**% of Budget Spent YTD**		
5	**ESA Program:**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**
6	**Energy Efficiency**												
7	Appliances	$ 882,134	$ 330,261	$ 1,212,395	$ 104,865	$ -	$ 104,865	$ 829,387	$ -	$ 829,387	94%	0%	68%
8	Domestic Hot Water	$ 63,436	$ 2,051,084	$ 2,114,520	$ 1,901	$ 61,456	$ 63,357	$ 22,632	$ 731,753	$ 754,385	36%	36%	36%
9	Enclosure	$ 2,462,449	$ 3,264,177	$ 5,726,626	$ 108,691	$ 144,078	$ 252,769	$ 1,007,580	$ 1,335,629	$ 2,343,210	41%	41%	41%
10	HVAC	$ 408,617	$ 3,563,903	$ 3,972,520	$ 57,983	$ 37,692	$ 95,675	$ 329,348	$ 1,052,712	$ 1,382,060	81%	30%	35%
11	Maintenance	$ 6,793	$ 280,466	$ 287,259	$ -	$ 25,719	$ 25,719	$ -	$ 176,560	$ 176,560	0%	63%	61%
12	Lighting	$ 4,465,300	$ -	$ 4,465,300	$ 243,322	$ -	$ 243,322	$ 2,036,775	$ -	$ 2,036,775	46%	0%	46%
13	Miscellaneous	$ 1,699,780	$ -	$ 1,699,780	$ 35,031	$ -	$ 35,031	$ 270,342	$ -	$ 270,342	16%	0%	16%
14	Customer Enrollment	$ 2,091,279	$ 2,091,279	$ 4,182,557	$ 108,880	$ 108,880	$ 217,761	$ 673,351	$ 673,351	$ 1,346,701	32%	32%	32%
15	In Home Education	$ 331,856	$ 331,856	$ 663,712	$ 20,208	$ 20,208	$ 40,417	$ 124,070	$ 124,070	$ 248,141	37%	37%	37%
16	Pilot	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
17		$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
18		$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
19	**Energy Efficiency TOTAL**	**$ 12,411,644**	**$ 11,913,026**	**$ 24,324,670**	**$ 680,881**	**$ 398,035**	**$ 1,078,915**	**$ 5,293,485**	**$ 4,094,076**	**$ 9,387,560**	43%	34%	39%
20													
21	Training Center	$ 244,205	$ 244,205	$ 488,411	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
22	Inspections	$ 88,441	$ 88,441	$ 176,882	$ 6,253	$ 6,253	$ 12,505	$ 42,068	$ 42,067	$ 84,135	48%	48%	48%
23	Marketing and Outreach	$ 600,000	$ 600,000	$ 1,200,000	$ 29,425	$ 29,425	$ 58,851	$ 288,531	$ 288,531	$ 577,061	48%	48%	48%
24	Statewide Marketing Education and Outreach	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
25	Studies	$ 17,083	$ 17,083	$ 34,166	$ -	$ -	$ -	$ 15,808	$ 15,808	$ 31,616	93%	93%	93%
26	Regulatory Compliance	$ 165,472	$ 165,472	$ 330,943	$ 13,862	$ 13,862	$ 27,724	$ 81,709	$ 81,708	$ 163,417	49%	49%	49%
27	General Administration	$ 1,341,766	$ 1,341,766	$ 2,683,531	$ 94,944	$ 94,943	$ 189,887	$ 739,407	$ 739,406	$ 1,478,813	55%	55%	55%
28	CPUC Energy Division	$ 23,409	$ 23,409	$ 46,818	$ -	$ -	$ -	$ 9,132	$ 9,132	$ 18,264	39%	39%	39%
29		$ 343,848	$ 343,848	$ 687,695	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
30													
31	**TOTAL PROGRAM COSTS**	**$ 15,235,867**	**$ 14,737,249**	**$ 29,973,116**	**$ 825,364**	**$ 542,518**	**$ 1,367,882**	**$ 6,470,138**	**$ 5,270,728**	**$ 11,740,867**	**42%**	**36%**	**39%**
32	**Funded Outside of ESA Program Budget**												
33	Indirect Costs				$ 42,455	$ 40,945	$ 83,399	$ 313,921	$ 307,938	$ 621,859			
34	NGAT Costs		$ 288,000	$ 288,000		$ 21,082	$ 21,082		$ 136,086	$ 136,086		47%	47%
35													

36 [1] Authorized budget does not include shifted funds from previous years and/or program cycles. Shifted funds, referred to as "2009-2016 Unspent ESA Program Funds", are reflected in ESA Table 1A.

37 [2] Reflects the authorized funding approved in the CPUC Energy Division Disposition Letter dated 12/27/2018 approving SDG&E Advice Letter 3250-E/2688-G.

38 [3] Current Month Expenses for Energy Efficiency Total includes August accrual and/or re-accrual of $661,019 in the following reporting categories: Appliances $14,338; Domestic Hot Water $27,760; HVAC $101,366; Misc. $40,869; Lighting $129,596; Maintenance $32,329; Enclosure $52; Customer Enrollment $267,055; In Home Energy Education $47,654.

39

40 **NOTE: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.**

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

	Authorized Budget [2]			Current Month Expenses			Year to Date Expenses			% of Budget Spent YTD		
ESA Program [1]:	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**
Energy Efficiency												
Multi-Family Common Area Measures	$ 1,817,500	$ 1,817,500	$ 3,635,000	$ 1,802	$ 1,801	$ 3,603	$ 114,575	$ 114,575	$ 229,151	6%	6%	6%
In-Home Education	$ 177,060	$ 177,060	$ 354,119	$ -	$ -	$ -	$ 69,145	$ 69,145	$ 138,289	39%	39%	39%
Leveraging - CSD [3]	$ 241,216	$ 241,216	$ 482,431			$ -			$ -	0%	0%	0%
Pilot [4]	$ 50,000	$ 50,000	$ 100,000	$ -	$ -	$ -	$ 10,256	$ 10,256	$ 20,511	21%	21%	21%
Studies [5]	$ 30,625	$ 30,625	$ 61,250	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
Regulatory Compliance	$ 23,438	$ 23,438	$ 46,875	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
General Administration	$ -	$ -	$ -	$ -	$ -	$ -	$ 417	$ 417	$ 833	0%	0%	0%
TOTAL PROGRAM BUDGET/EXPENSES	**$ 2,339,838**	**$ 2,339,838**	**$ 4,679,675**	**$ 1,802**	**$ 1,801**	**$ 3,603**	**$ 194,392**	**$ 194,392**	**$ 388,784**	**8%**	**8%**	**8%**

[1] Add additional categories if relevant to your utility
[2] Reflects the authorized funding in D.16-11-022 and updated via Resolution E-4884 addressing conforming Advice Letters 3065-E/2568-G and 3065-E-A/2568-G-A. Budgets updated and approved via AL 3250-E/2688-G.
[3] Refers to budget spent supporting CSD's LIWP program
[4] Funding authorized for Programmable Communicating Thermostat (PCT) Pilot.
[5] Funding authorized for Rapid Feedback Research and Analysis and Potential and Goals Study.

NOTE: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

Energy Savings Assistance Program Table 2A
SDG&E
August 2019

		ESA Program - CSD Leveraging					
		Year-To-Date Completed & Expensed Installation					
Measures	**Units**	**Quantity Installed**	**kWh[3] (Annual)**	**kW[3] (Annual)**	**Therms[3] (Annual)**	**Expenses ($)**	**% of Expenditure**
Appliances							
High Efficiency Clothes Washer	Each	-	-	-	-	$ -	0.0%
Refrigerators	Each	-	-	-	-	$ -	0.0%
Microwaves [4]	Each	-	-	-	-	$ -	0.0%
Domestic Hot Water							
Water Heater Blanket	Home	-	-	-	-	$ -	0.0%
Low Flow Shower Head	Home	-	-	-	-	$ -	0.0%
Water Heater Pipe Insulation	Home	-	-	-	-	$ -	0.0%
Faucet Aerator	Home	-	-	-	-	$ -	0.0%
Water Heater Repair/Replacement	Each	-	-	-	-	$ -	0.0%
Thermostatic Shower Valve	Each	-	-	-	-	$ -	0.0%
Combined Showerhead/TSV	Each	-	-	-	-	$ -	0.0%
Heat Pump Water Heater	Each	-	-	-	-	$ -	0.0%
Tub Diverter/ Tub Spout	Each	-	-	-	-	$ -	0.0%
Thermostat-controlled Shower Valve	Each	-	-	-	-	$ -	0.0%
Enclosure							
Air Sealing / Envelope [1]	Home	-	-	-	-	$ -	0.0%
Caulking	Home	-	-	-	-	-	0.0%
Attic Insulation	Home	-	-	-	-	$ -	0.0%
HVAC							
FAU Standing Pilot Conversion	Each	-	-	-	-	$ -	0.0%
Furnace Repair/Replacement	Each	-	-	-	-	$ -	0.0%
Room A/C Replacement	Each	-	-	-	-	$ -	0.0%
Central A/C replacement	Each	-	-	-	-	$ -	0.0%
Heat Pump Replacement	Each	-	-	-	-	$ -	0.0%
Evaporative Cooler (Replacement)	Each	-	-	-	-	$ -	0.0%
Evaporative Cooler (Installation)	Each	-	-	-	-	$ -	0.0%
Duct Testing and Sealing	Home	-	-	-	-	$ -	0.0%
Energy Efficient Fan Control	Home	-	-	-	-	$ -	0.0%
Prescriptive Duct Sealing	Home	-	-	-	-	$ -	0.0%
High Efficiency Forced Air Unit (HE FAU)	Home	-	-	-	-	$ -	0.0%
A/C Time Delay	Home	-	-	-	-	$ -	0.0%
Maintenance							
Furnace Clean and Tune	Home	-	-	-	-	$ -	0.0%
Central A/C Tune up	Home	-	-	-	-	$ -	0.0%
Lighting							
Interior Hard wired LED fixtures	Each	-	-	-	-	$ -	0.0%
Exterior Hard wired LED fixtures	Each	-	-	-	-	$ -	0.0%
Torchiere LED	Each	-	-	-	-	$ -	0.0%
Occupancy Sensor	Each	-	-	-	-	$ -	0.0%
LED Night Lights	Each	-	-	-	-	$ -	0.0%
LED Diffuse Bulb (60W Replacement)	Each	-	-	-	-	$ -	0.0%
LED Reflector Bulb	Each	-	-	-	-	$ -	0.0%
LED Reflector Downlight Retrofit Kits	Each	-	-	-	-	$ -	0.0%
LED A-Lamps	Each	-	-	-	-	$ -	0.0%
Miscellaneous							
Pool Pumps	Each	-	-	-	-	$ -	0.0%
Smart Power Strips - Tier 1	Each	-	-	-	-	$ -	0.0%
Smart Power Strips - Tier 2	Each	-	-	-	-	$ -	0.0%
Pilots							
Customer Enrollment							
Outreach & Assessment	Home	-				$ -	0.0%
In-Home Education	Home	-				$ -	0.0%
Total Savings/Expenditures			-	-	-	$ -	0.0%
Total Households Weatherized [2]							
CSD MF Tenant Units Treated			**Total**				
			-				
			-				

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect

[1] Envelope and Air Sealing Measures may include outlet cover plate gaskets, attic access weatherization, weatherstripping - door, caulking and minor home repairs. Minor home repairs predominantly are door jamb repair / replacement, door repair, and window putty.

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

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

Energy Savings Assistance Common Area Measures Program Table 2B
SDG&E
August 2019

	Table 2B ESA Program - Multifamily Common Area Measures[5]						
		Year-To-Date Completed & Expensed Installation					
ESA CAM Measures[1,6]	Units (of Measure such as "each")	Quantity Installed	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses ($)	% of Expenditure
Appliances							
Domestic Hot Water							
Envelope							
HVAC							
Lighting							
Miscellaneous							
Ancillary Services							
Audit[4]							
Total	-	0	0	0	0	0	

Multifamily Properties Treated	Number
Total Number of Multifamily Properties Treated[2]	
Subtotal of Master-metered Multifamily Properties Treated	
Total Number of Multifamily Tenant Units w/in Properties Treated[3]	

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

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

Standard Notes 1 - 6 (do not delete)

1. Measures are customized by each IOU, see 'Table 2B-1, Eligible Measures List'. Measures list may change based on available information on both costs and benefits and may vary across climate zones. Each IOU should fill out Table 2B as it pertains to their program. Table 2B-1 Column A should match Table 2B Column A for eligible (not canceled) measures.

2. Multifamily properties are sites with at least five (5) or more dwelling units. The properties may have multiple buildings.

3. Multifamily tenant units are the number of dwelling units located within properties treated. This number does not represent the same number of dwellings treated as captured in table 2A.

4. Audit costs may be covered by other programs or projects may utilize previous audits. Not all participants will have an audit cost associated with their project.

5. Applicable to Deed-Restricted, government and non-profit owned multi-family buildings described in D.16-11-022, modified by D.17-12-009, where 65% of tenants are income eligible based (at or below 200% of the Federal Poverty Guidelines).

6. Commissioning costs, as allowable per the Decision, are included in measures total cost unless otherwise noted.

7 All savings are calculated based on the following sources:

Energy Savings Assistance CAM Program Table 2B-1, Eligible Common Area Measures List
SDG&E
August 2019

Common Area Measures Category and Eligible Measures Title [1]	Effective Date	End Date[2]	Eligible Climate Zones [3]
Appliances			
Domestic Hot Water			
Envelope			
HVAC			
Lighting			
Miscellaneous			

Standard Notes (do not delete)

1. Measures list may change based on available information on both costs and benefits (including energy benefits as well as non-energy benefits) and may vary across climate zones. This is not a list of installed measures, it is a list of eligible measures.

Table 2B-1 Column A should match Table 2B Column A for eligible (not canceled) measures.

2. Only complete if measure is canceled or discontinued

3. Defined as CEC California Building Climate Zones
https://www.energy.ca.gov/maps/renewable/building_climate_zones.html

Energy Savings Assistance Program Table 2
SDG&E
August 2019

	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**	**kWh [4] (Annual)**	**kW [4]**	**Therms [4]**	**Expenses ($) [7]**	**% of**	**Units**	**Quantity**	**kWh[4]**	**kW[4]**	**Therms[4]**	**Expenses ($)**	**% of**	**Units**	**Quantity**	**kWh[4]**	**kW[4]**	**Therms[4]**	**Expenses ($)**	**% of**	**Units**	**Quantity**	**kWh[4]**	**kW[4]**	**Therms[4]**	**Expenses**	**% of**
Appliances		(K+S)	(L+T)	(M+U)	(N+V)	(O+W)																						
High Efficiency Clothes Washer	Each	213	983	-	3,251	$ 194,532	2.2%	Each	50	246	-	761	47,856	1.6%	Each	163	737	-	2,490	146,676	2.6%	Each	-	-	-	-	$ -	0.0%
Refrigerator	Each	647	400,780	47	-	$ 570,698	6.6%	Each	117	72,349	9	-	110,354	3.7%	Each	530	328,431	39	-	$ 460,344	8.1%	Each	-	-	-	-	$ -	0.0%
Microwave	Each	592	200	0	236	$ 64,779	0.7%	Each	143	-	-	24	15,497	0.5%	Each	449	200	0	212	$ 49,283	0.9%	Each	-	-	-	-	$ -	0.0%
Domestic Hot Water																												
Water Heater Blanket	Home	100	31	0	40	$ 5,764	0.1%	Home	30	12	0	12	$ 1,729	0.1%	Home	70	20	0	28	$ 4,035	0.1%	Home	-	-	-	-	$ -	0.0%
Low Flow Showerhead	Home	4,260	474	0	2,723	$ 266,566	3.1%	Home	1,103	160	0	791	$ 74,557	2.5%	Home	3,157	314	0	1,933	$ 192,009	3.4%	Home	-	-	-	-	$ -	0.0%
Water Heater Pipe Insulation	Home	25	0	-	1	$ 618	0.0%	Home	14	0	-	0	$ 378	0.0%	Home	11	-	-	0	$ 240	0.0%	Home	-	-	-	-	$ -	0.0%
Faucet Aerator	Home	4,423	335	0	2,043	$ 43,657	0.5%	Home	1,661	122	0	827	$ 15,943	0.5%	Home	2,762	213	0	1,216	$ 27,714	0.5%	Home	-	-	-	-	$ -	0.0%
Water Heater Repair/Replacement	Each	626	-	-	4,257	$ 425,713	4.9%	Each	223	-	-	1,516	$ 121,864	4.0%	Each	403	-	-	2,740	$ 303,849	5.3%	Each	-	-	-	-	$ -	0.0%
Thermostatic Shower Valve	Each	2,766	5,678	1	4,917	$ 173,152	2.0%	Each	990	2,280	0	1,928	$ 61,974	2.1%	Each	1,776	3,398	0	2,989	$ 111,178	2.0%	Each	-	-	-	-	$ -	0.0%
Combined Showerhead/TSV	Each	9	82	-	74	$ 683	0.0%	Each	-	-	-	-	$ -	0.0%	Each	9	82	-	74	$ 683	0.0%	Each	-	-	-	-	$ -	0.0%
New - Heat Pump Water Heater	Each	-	-	-	-	$ -	0.0%	Each	-					0.0%	Each	-					0.0%	Each	-	-	-	-	$ -	0.0%
New - Tub Diverter/ Tub Spout	Each	8	-	-	16	$ 1,003	0.0%	Each	6	-	-	12	$ 702	0.0%	Each	2	-	-	4	$ 301	0.0%	Each	-	-	-	-	$ -	0.0%
New - Thermostat-controlled Shower Valve	Each	-	-	-	-	$ -	0.0%	Each	-					0.0%	Each	-					0.0%	Each	-	-	-	-	$ -	0.0%
Enclosure																												
Air Sealing	Home	5,188	42,045	9	7,700	$ 2,134,548	24.5%	Home	1,421	17,736	4	2,382	$ 667,069	22.2%	Home	3,767	24,309	5	5,318	$ 1,467,479	25.8%	Home	-	-	-	-	$ -	0.0%
Caulking	Home	-	-	-	-	$ -	0.0%	Home						0.0%	Home						0.0%	Home	-	-	-	-	-	0.0%
Attic Insulation	Home	105	2,037	0	2,619	$ 133,288	1.5%	Home	34	770	0	894	$ 42,636	1.4%	Home	71	1,268	0	1,725	$ 90,652	1.6%	Home	-	-	-	-	$ -	0.0%
HVAC																												
FAU Standing Pilot Conversion	Each	-	-	-	-	$ -	0.0%	Each	-					0.0%	Each	-					0.0%	Each	-	-	-	-	$ -	0.0%
Furnace Repair/Replacement	Each	1,107	-	-	-	$ 904,731	10.4%	Each	289	-	-	-	$ 329,571	10.9%	Each	818	-	-	-	$ 575,159	10.1%	Each	-	-	-	-	$ -	0.0%
Room A/C Replacement	Each	246	-	-	-	$ 247,794	2.8%	Each	36	-	-	-	$ 37,632	1.3%	Each	210	-	-	-	$ 210,162	3.7%	Each	-	-	-	-	$ -	0.0%
Central A/C replacement	Each	-	-	-	-	$ -	0.0%	Each	-					0.0%	Each	-					0.0%	Each	-	-	-	-	$ -	0.0%
Heat Pump Replacement	Each	-	-	-	-	$ -	0.0%	Each	-					0.0%	Each	-					0.0%	Each	-	-	-	-	$ -	0.0%
Evaporative Cooler (Replacement)	Each	-	-	-	-	$ -	0.0%	Each	-					0.0%	Each	-					0.0%	Each	-	-	-	-	$ -	0.0%
Evaporative Cooler (Installation)	Each	-	-	-	-	$ -	0.0%	Each	-					0.0%	Each	-					0.0%	Each	-	-	-	-	$ -	0.0%
Duct Test and Seal	Home	132	1,616	0	1,865	$ 20,517	0.2%	Home	56	557	0	799	$ 7,773	0.3%	Home	76	1,059	0	1,065	$ 12,745	0.2%	Home	-	-	-	-	$ -	0.0%
New - Energy Efficient Fan Control	Home	-	-	-	-	$ -	0.0%	Home	-					0.0%	Home	-					0.0%	Home	-	-	-	-	$ -	0.0%
New - Prescriptive Duct Sealing	Home	-	-	-	-	$ -	0.0%	Home	-					0.0%	Home	-					0.0%	Home	-	-	-	-	$ -	0.0%
New - High Efficiency Forced Air Unit (HE FAU)	Home	-	-	-	-	$ -	0.0%	Home	-					0.0%	Home	-					0.0%	Home	-	-	-	-	$ -	0.0%
New - A/C Time Delay	Home	-	-	-	-	$ -	0.0%	Home	-					0.0%	Home	-					0.0%	Home	-	-	-	-	$ -	0.0%
Maintenance																												
Furnace Clean and Tune	Home	1,539	-	-	18,954	$ 118,444	1.4%	Home	386	-	-	4,791	$ 29,870	1.0%	Home	1,153	-	-	14,163	$ 88,575	1.6%	Home	-	-	-	-	$ -	0.0%
Central A/C Tune up	Home	-	-	-	-	$ -	0.0%	Home	-					0.0%	Home	-					0.0%	Home	-	-	-	-	$ -	0.0%
Lighting																												
Interior Hardwire LED Fixtures	Each	5,567	379,502	701	(131)	$ 444,549	5.1%	Each	1,508	102,800	190	(34)	$ 120,285	4.0%	Each	4,059	276,702	511	(96)	$ 324,263	5.7%	Each	-	-	-	-	$ -	0.0%
Exterior Hard wired LED fixtures	Each	1,285	133,216	107	-	$ 88,665	1.0%	Each	517	53,597	43	-	$ 35,673	1.2%	Each	768	79,619	64	-	$ 52,992	0.9%	Each	-	-	-	-	$ -	0.0%
LED Torchiere	Each	6,116	416,928	771	(9,783)	$ 548,177	6.3%	Each	1,570	107,027	198	(2,471)	$ 140,719	4.7%	Each	4,546	309,901	573	(7,313)	$ 407,458	7.2%	Each	-	-	-	-	$ -	0.0%
Occupancy Sensor	Each	-	-	-	-	$ -	0.0%	Each	-					0.0%	Each	-					0.0%	Each	-	-	-	-	$ -	0.0%
LED Night Light	Each	5,749	6,450	1	-	$ 20,044	0.2%	Each	1,977	2,225	0	-	$ 6,945	0.2%	Each	3,772	4,225	0	-	$ 13,099	0.2%	Each	-	-	-	-	$ -	0.0%
LED Diffuse Bulb (60W Replace)	Each	46,694	669,125	66	(11,317)	$ 653,716	7.5%	Each	22,422	321,307	32	(5,216)	$ 313,908	10.4%	Each	24,272	347,818	34	(6,101)	$ 339,808	6.0%	Each	-	-	-	-	$ -	0.0%
LED Reflector Bulb (BR30 Recessed)	Each	4,687	125,972	13	(1,854)	$ 72,180	0.8%	Each	2,544	68,375	7	(937)	$ 39,178	1.3%	Each	2,143	57,597	6	(916)	$ 33,002	0.6%	Each	-	-	-	-	$ -	0.0%
New - LED Reflector Downlight Retrofit Kits	Each	-	-	-	-	$ -	0.0%	Each	-					0.0%	Each	-					0.0%	Each	-	-	-	-	$ -	0.0%
New - LED A-Lamps	Each	-	-	-	-	$ -	0.0%	Each	-					0.0%	Each	-					0.0%	Each	-	-	-	-	$ -	0.0%
Miscellaneous																												
Pool Pumps	Each	-	-	-	-	$ -	0.0%	Each	-					0.0%	Each	-					0.0%	Each	-	-	-	-	$ -	0.0%
Smart Strip	Each	1,956	47,922	-	-	$ 74,039	0.9%	Each	1,242	30,429	-	-	$ 47,014	1.6%	Each	714	17,493	-	-	$ 27,025	0.5%	Each	-	-	-	-	$ -	0.0%
Smart Strip Tier II	Each	2,175	291,233	43	(4,293)	$ 148,760	1.7%	Each	963	128,946	19	(1,880)	$ 65,790	2.2%	Each	1,212	162,287	24	(2,413)	$ 82,970	1.5%	Each	-	-	-	-	$ -	0.0%
Pilots																												
Customer Enrollment																												
ESA Outreach & Assessment	Home	7,486				$ 1,134,645	13.0%	Home	3,815				$ 567,899	18.9%	Home	3,671				$ 566,746	10.0%	Home	-				$ -	0.0%
ESA In-Home Energy Education	Home	7,486				$ 209,585	2.4%	Home	3,815				$ 107,062	3.6%	Home	3,671				$ 102,523	1.8%	Home	-				$ -	0.0%
Total Savings/Expenditures			2,524,609	1,759	21,319	$ 8,700,845				908,939	502	4,199	$ 3,009,878				1,615,670	1,258	17,120	$ 5,690,967				-	-	-	$ -	
Total Households Weatherized [2]		5,293							1,455							3,838							-					
Households Treated	Total (K+S)							First Touches							**Re-treated Homes/Go-Backs**							**Aliso Canyon**						
- Single Family Households Treated	Home	2,211						Home	1,305						Home	906						Home						
- Multi-family Households Treated	Home	4,751						Home	2,172						Home	2,579						Home						
- Mobile Homes Treated	Home	524						Home	338						Home	186						Home						
Total Number of Households Treated	Home	7,486						Home	3,815						Home	3,671						Home						
# Eligible Households to be Treated for PY [3]	Home	22,641						Home	11,910						Home	10,731						Home						
% of Households Treated	%	33%						%	32%						%	34%						%	0%					
- Master-Meter Households Treated	Home	546						Home	279						Home	267						Home						

	A	B
1	**Energy Savings Assistance Program Tables 3A-C - Energy Savings and Average Bill Savings per Treated Home/Common Area**	
2	**SDG&E**	
3	**August 2019**	
4		
5	**Table 3A-1, ESA Program**	
6	Annual kWh Savings	2,524,609
7	Annual Therm Savings	21,319
8	Lifecycle kWh Savings	36,634,231
9	Lifecycle Therm Savings	44,607
10	Current kWh Rate	$ 0.26
11	Current Therm Rate	$ 1.20
12	Average 1st Year Bill Savings / Treated households	$ 63.31
13	Average Lifecycle Bill Savings / Treated Household	$ 880.29
14		
15		
16	**Table 3A-2, ESA Program - CSD Leveraging**	
17	Annual kWh Savings	-
18	Annual Therm Savings	-
19	Lifecycle kWh Savings	-
20	Lifecycle Therm Savings	-
21	Current kWh Rate	$ -
22	Current Therm Rate	$ -
23	Average 1st Year Bill Savings / Treated Households	$ -
24	Average Lifecycle Bill Savings / Treated Household	$ -
25		
26		
27	**Table 3A-3, Summary - ESA Program/CSD Leveraging**	
28	Annual kWh Savings	2,524,609
29	Annual Therm Savings	21,319
30	Lifecycle kWh Savings	36,634,231
31	Lifecycle Therm Savings	44,607
32	Current kWh Rate	$ 0.26
33	Current Therm Rate	$ 1.20
34	Average 1st Year Bill Savings / Treated Households	$ 63.31
35	Average Lifecycle Bill Savings / Treated Households	$ 880.29
36		
37	[1] Summary is the sum of ESA Program + CSD Leveraging	
38		
39	**Table 3B, ESA Program - Multifamily Common Area**	
40	Annual kWh Savings	-
41	Annual Therm Savings	-
42	Lifecycle kWh Savings	-
43	Lifecycle Therm Savings	-
44	Current kWh Rate	$ -
45	Current Therm Rate	$ -
46	Average 1st Year Bill Savings / Treated Property	$ -
47	Average Lifecycle Bill Savings / Treated Property	$ -

	A	B	C	D	E	F	G
1	**Energy Savings Assistance Program Table 4 - Homes/Buildings Treated**						
2	**SDG&E**						
3	**August 2019**						
4							
5	**Table 4A-1, ESA Program**						
6		**Eligible Households**			**Households Treated YTD**		
7	**County**	**Rural [1]**	**Urban**	**Total**	**Rural**	**Urban**	**Total**
8	Orange	19,168	0	**19,168**	0	140	**140**
9	San Diego	292,139	7,818	**299,957**	106	7,240	**7,346**
10	**Total**	**311,307**	**7,818**	**319,125**	**106**	**7,380**	**7,486**
11							
12							
13	**Table 4B, ESA Program - CSD Leveraging**						
14					**Households Treated YTD**		
15	**County**				**Rural**	**Urban**	**Total**
16	Orange						**0**
17	San Diego						**0**
18	**Total**				**0**	**0**	**0**
19							
20							
21	**Table 4C, ESA Program - Multifamily Common Area**						
22					**Properties Treated YTD**		
23	**County**				**Rural**	**Urban**	**Total**
24	Orange						**0**
25	San Diego						**0**
26	**Total**				**0**	**0**	**0**
27							
28	[1] For IOU low income-related and Energy Efficiency reporting and analysis, the Goldsmith definition is applied.						
29	**Note:** Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.						

Energy Savings Assistance Program Table 4A-2, Homes Unwilling / Unable to Participate

SDG&E

August 2019

ESA Program

	Reason Provided						
County	**Customer Unwilling/Declined Program Measures**	**Customer Unavailable - Scheduling Conflicts**	**Hazardous Environment (unsafe/unclean)**	**Landlord Refused to Authorize Participation**	**Household Exceeds Allowable Limits**	**Unable to Provide Required Documentation**	**Other Infeasible/ Ineligible**
Orange	30	113	1	0	53	0	3
San Diego	5,666	5,981	22	0	4,625	554	219
Total	**5,696**	**6,094**	**23**	**0**	**4,678**	**554**	**222**

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

Energy Savings Assistance Program Table 5 - Energy Savings Assistance Program Customer Summary
SDG&E
August 2019

Table 5A, ESA Program

		Gas & Electric				Gas Only				Electric Only				Total					
		# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Household Count)		(Annual)		
Month			Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW		# of First-Tourch	# of Re-treatment	Therm	kWh	kW
January		73	49	100,121	80	-	-	-	-	8	-	12,501	9	81	45	36	49	112,622	89
February		566	2,461	287,558	269					130	-	36,658	19	696	259	437	2,461	324,216	288
March		1,515	2,050	373,657	243					155	-	38,430	17	1,670	569	1,101	2,050	412,087	260
April		901	2,189	368,243	238					33	-	17,968	5	934	364	570	2,189	386,211	243
May		1,783	3,599	459,141	296					51	-	27,618	9	1,834	1,126	708	3,599	486,759	305
June		543	3,557	198,464	153					17	-	10,268	7	560	365	195	3,557	208,732	160
July		856	4,958	297,328	205					61	-	17,601	11	917	580	337	4,958	314,929	216
August		743	2,456	252,949	176					51	-	26,104	22	794	509	285	2,456	279,053	198
September											-			-			-	-	-
October											-			-			-	-	-
November											-			-			-	-	-
December											-			-			-	-	-
YTD		**6,980**	**21,319**	**2,337,461**	**1,662**	**-**	**-**	**-**	**-**	**506**	**-**	**187,148**	**99**	**7,486**	**3,817**	**3,669**	**21,319**	**2,524,609**	**1,759**

YTD Total Energy Impacts for all fuel types should equal YTD energy impacts that are reported every month Table 2.
Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

Table 5B, ESA Program - CSD Leveraging

		Gas & Electric				Gas Only				Electric Only				Total			
		# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Annual)		
Month			Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW
January																	
February																	
March																	
April																	
May																	
June																	
July																	
August																	
September																	
October																	
November																	
December																	
YTD		**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**0**

YTD Total Energy Impacts for all fuel types should equal YTD energy impacts that are reported every month Table 2A.
Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

Table 5C, ESA Program - Multifamily Common Area

		Gas & Electric				Gas Only				Electric Only				Total			
		# of Properties Treated by Month	(Annual)			# of Properties Treated by Month	(Annual)			# of Properties Treated by Month	(Annual)			# of Properties Treated by Month	(Annual)		
Month			Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW
January																	
February																	
March																	
April																	
May																	
June																	
July																	
August																	
September																	
October																	
November																	
December																	
YTD		**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**0**

YTD Total Energy Impacts for all fuel types should equal YTD energy impacts that are reported every month Table 2B.
Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	**Energy Savings Assistance Program Table 6 - Expenditures for Pilots and Studies**												
2	**SDG&E**												
3	**August 2019**												
4		**Authorized 2019 Funding [1]**			**Current Month Expenses**			**Year to Date Expenses**			**% of Budget Expensed**		
5		**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**
6	**Pilots**												
7	Programmable Communicating Thermostat (PCT) [2]	$ 50,000	$ 50,000	$100,000	$0	$0	$0	$10,256	$10,256	$20,511	21%	21%	21%
8													
9													
10	**Total Pilots**	**$50,000**	**$50,000**	**$100,000**	**$0**	**$0**	**$0**	**$10,256**	**$10,256**	**$20,511**	**0%**	**0%**	**0%**
11													
12													
13	**Studies**												
14	Low Income Needs Assessment Study	$ 8,334	$ 8,334	$16,667	$0	$0	$0	$9,291	$9,291	$18,582	111%	111%	111%
15	Load Impact Evaluation Study	$ 9,167	$ 9,167	$18,333	$0	$0	$0	$4,650	$4,650	$9,301	51%	51%	51%
16	Equity Criteria and Non Energy Benefits Evaluation (NEB's)	$ 2,500	$ 2,500	$5,000	$0	$0	$0	$1,867	$1,867	$3,733	75%	75%	75%
17	Unallocated Funds [3]	$ (2,917)	$ (2,917)	-$5,834	$0	$0	$0	$0	$0	$0	0%	0%	0%
18	2017 Potential and Goals Study	$ 5,625	$ 5,625	$11,250	$0	$0	$0	$0	$0	$0	0%	0%	0%
19	Rapid Feedback Research and Analysis	$ 25,000	$ 25,000	$50,000	$0	$0	$0	$0	$0	$0	0%	0%	0%
20													
21													
22													
23	**Total Studies**	**$47,708**	**$47,708**	**$95,416**	**$0**	**$0**	**$0**	**$15,808**	**$15,808**	**$31,616**	**33%**	**33%**	**33%**
24													
25	[1] Reflects the authorized funding in D.16-11-022 and updated via Resolution E-4884 addressing conforming Advice Letters 3065-E/2568-G and 3065-E-A/2568-G-A.												
26	[2] Programmable Communicating Thermostat (PCT) Pilot budget approved via al 3250-E/2688-G. [Table 1A].												
27	[3] Unallocated funds represent the amount of funds originally requested for the Energy Education Phase II Study which was subsequently not authorized in D.16-11-022. However the budget was authorized and is now unallocated to a specific study [Table 1].												
28													
29	**Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.**												

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

SDG&E
August 2019

7A - Households Receiving Second Refrigerators			
Measures	Units	Received Refrigerator	Not eligible for Refrigerator due to Less than Six Occupants
Second Refrigerators	Each	1	3

7B - Households Receiving In- Home Energy Education Only		
Measures	Units	Households that Only Received Energy Education
In-Home Education	Home	0

7C - Households for My Energy/My Account Platform		
Opt-Out	Already Enrolled	Opt-In
7137	1076	350
83%	13%	4%

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	**CARE Table 1 - CARE Program Expenses**												
2	**SDG&E**												
3	**August 2019**												
4		**Authorized Budget [1]**			**Current Month Expenses**			**Year to Date Expenses**			**% of Budget Spent YTD**		
5	**CARE Program:**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**
6	Outreach	$ 2,899,757	$ 322,195	$ 3,221,952	$ 266,351	$ 23,161	$ 289,512	$ 1,553,195	$ 139,631	$ 1,692,827	54%	43%	53%
7	Processing / Certification Re-certification	$ 460,881	$ 51,209	$ 512,090	$ 62,022	$ 5,393	$ 67,416	$ 375,040	$ 33,848	$ 408,889	81%	66%	80%
8	Post Enrollment Verification	$ 324,060	$ 36,007	$ 360,066	$ 23,238	$ 2,021	$ 25,259	$ 159,804	$ 14,373	$ 174,176	49%	40%	48%
9	IT Programming	$ 1,474,200	$ 163,800	$ 1,638,000	$ 56,652	$ 4,926	$ 61,578	$ 721,513	$ 65,807	$ 787,320	49%	40%	48%
10	Cooling Centers	$ 39,150	$ 4,350	$ 43,500	$ -	$ -	$ -	$ 5,744	$ 500	$ 6,244	15%	11%	14%
11													
12	Pilots/CHANGES Program [2]	$ 238,593	$ 26,510	$ 265,103	$ -	$ -	$ -	$ 191,423	$ 17,930	$ 209,353	80%	68%	79%
13	Studies [3]	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
14	Regulatory Compliance	$ 313,228	$ 34,803	$ 348,031	$ 19,116	$ 1,662	$ 20,778	$ 103,693	$ 9,321	$ 113,014	33%	27%	32%
15	General Administration	$ 702,983	$ 78,109	$ 781,092	$ 34,882	$ 3,033	$ 37,915	$ 273,839	$ 24,930	$ 298,769	39%	32%	38%
16	CPUC Energy Division	$ 51,551	$ 5,728	$ 57,279	$ -	$ -	$ -	$ 39,163	$ 3,453	$ 42,617	76%	60%	74%
17													
18	**SUBTOTAL MANAGEMENT COSTS**	**$ 6,504,402**	**$ 722,711**	**$ 7,227,114**	**$ 462,260**	**$ 40,197**	**$ 502,457**	**$ 3,423,414**	**$ 309,795**	**$ 3,733,208**	**53%**	**43%**	**52%**
19													
20	CARE Rate Discount	$ 66,449,856	$ 7,383,317	$ 73,833,173	$ 10,635,697	$ 613,664	**$ 11,249,361**	$ 66,500,841	$ 9,438,449	**$ 75,939,290**	100%	128%	103%
21													
22	**TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS**	**$ 72,954,258**	**$ 8,106,029**	**$ 81,060,287**	**$ 11,097,957**	**$ 653,861**	**$ 11,751,818**	**$ 69,924,255**	**$ 9,748,243**	**$ 79,672,499**	**96%**	**120%**	**98%**
23													
24	Other CARE Rate Benefits												
25	- DWR Bond Charge Exemption				$ 565,908		$ 565,908	$ 4,048,619		$ 4,048,619			
26	- CARE Surcharge Exemption				$ 962,874	$ 52,687	$ 1,015,561	$ 6,845,757	$ 728,558	$ 7,574,315			
27	- California Solar Initiative Exemption				$ 15,685		$ 15,685	$ 111,560		$ 111,560			
28	- kWh Surcharge Exemption				$ 146,405		$ 146,405	$ 403,552		$ 403,552			
29	- Vehicle Grid Integration Exemption				$ 75,732		$ 75,732	$ 505,911		$ 505,911			
30	Total Other CARE Rate Benefits				**$ 1,766,604**	**$ 52,687**	**$ 1,819,291**	**$ 11,915,400**	**$ 728,558**	**$ 12,643,958**			
31													
32	Indirect Costs				$ 78,241	$ 6,804	**$ 85,045**	$ 586,256	$ 52,767	**$ 639,023**			
33													
34	[1] Reflects the authorized funding approved in the CPUC Energy Division Disposition Letter dated 12/27/2018 approving SDG&E Advice Letter 3250-E/2688-G.												
35	[2] Decision 15-12-047 transitioned CHANGES pilot to CHANGES program and funding for the effort is captured herein.												
36	[3] Reflects the Annual Eligibility Estimates prepared by Athens Research on behalf of the utilities. This effort was formerly referenced as Measurement and Evaluation.												
37													
38	**NOTE: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.**												

CARE Table 2 - Enrollment, Recertification, Attrition, & Penetration[5]
SDG&E
August 2019

	New Enrollment										Recertification				Attrition (Drop Offs)					Enrollment				
	Automatic Enrollment				Self-Certification (Income or Categorical)																			
	Inter-Utility[1]	Intra-Utility[2]	Leveraging[3]	Combined (B+C+D)	Online	Paper	Phone	Capitation	Combined (F+G+H+I)	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)	Total CARE Participants	Estimated CARE Eligible[5]	Penetration Rate % (W/X)
January	151	90	0	246	3,247	1,833	204	244	5,528	5,774	2,369	1,277	3,794	7,440	1,509	79	135	4,889	6,612	13,214	-838	293,548	319,125	92%
February	42	74	0	120	3,087	1,664	363	184	5,298	5,418	2,594	1,443	2,972	7,009	3,312	74	219	3,995	7,600	12,427	-2,182	291,924	319,125	91%
March	36	107	0	149	4,414	2,083	202	241	6,940	7,089	4,810	1,708	3,344	9,862	706	661	1,083	4,757	7,207	16,951	-118	291,637	319,125	91%
April	22	95	0	121	3,172	2,403	109	251	5,935	6,056	3,308	1,797	2,245	7,350	1,299	210	236	4,070	5,815	13,406	241	292,454	319,125	91%
May	20	85	0	108	4,047	2,201	183	258	6,689	6,797	2,692	1,506	2,806	7,004	1,723	148	182	3,933	5,986	13,801	811	293,441	319,125	91%
June	35	62	0	50	4,433	1,849	70	235	6,587	6,637	1,502	1,490	3,952	6,944	1,991	93	146	3,912	6,142	13,581	495	293,399	319,125	91%
July	19	94	0	113	5,672	2,518	224	263	8,677	8,790	2,767	2,074	3,642	8,483	1,376	71	127	5,222	6,796	17,273	1,994	295,472	319,125	92%
August	19	62	0	81	4,192	2,013	369	195	6,769	6,850	2,747	2,017	4,524	9,288	1,502	42	117	2,052	3,713	16,138	3,137	297,084	319,125	93%
September																								
October																								
November																								
December																								
YTD Total	**344**	**669**	**0**	**988**	**32,264**	**16,564**	**1,724**	**1,871**	**52,423**	**53,411**	**22,789**	**13,312**	**27,279**	**63,380**	**13,418**	**1,378**	**2,245**	**32,830**	**49,871**	**116,791**	**3,540**	**297,084**	**319,125**	**93%**

[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.

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

CARE Table 3A - Post-Enrollment Verification Results (Model)
SDG&E
August 2019

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	293,548	1,234	0.4%	519	158	719	58.3%	0.2%
February	291,924	1,128	0.4%	595	77	716	63.5%	0.2%
March	291,637	1,097	0.4%	565	87	689	62.8%	0.2%
April	292,454	1,344	0.5%	707	90	846	62.9%	0.3%
May	293,441	1,072	0.4%	633	47	719	67.1%	0.2%
June	293,399	1,072	0.4%	86	47	162	15.1%	0.1%
July	295,472	1,323	0.0%	0	42	61	4.6%	0.0%
August	297,084	1,074	0.0%	0	8	8	0.7%	0.0%
September			0.0%			0	0.0%	0.0%
October			0.0%			0	0.0%	0.0%
November			0.0%			0	0.0%	0.0%
December			0.0%			0	0.0%	0.0%
YTD Total	**297,084**	**9,344**	**3.1%**	**3,105**	**556**	**3,920**	**42.0%**	**1.3%**

[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.
[4] Percentage of customers dropped compared to the total participants requested to provide verification in that month.
Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD

CARE Table 3B Post-Enrollment Verification Results (Electric only High Usage)
IOU NAME
MONTH YEAR

Month	Total CARE Households Enrolled	Households Requested to Verify1	% 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	293,548	954	0.3%	662	0	662	69.4%	0.2%
February	291,924	1,067	0.4%	815	0	815	76.4%	0.3%
March	291,637	588	0.2%	422	0	422	71.8%	0.1%
April	292,454	548	0.2%	366	0	366	66.8%	0.1%
May	293,441	187	0.1%	90	0	90	48.1%	0.0%
June	293,399	177	0.1%	86	0	86	48.6%	0.0%
July	295,472	238	0.0%	21	0	21	8.8%	0.0%
August	297,084	616	0.0%	0	0	0	0.0%	0.0%
September			0.0%			0	0.0%	0.0%
October			0.0%			0	0.0%	0.0%
November			0.0%			0	0.0%	0.0%
December			0.0%			0	0.0%	0.0%
YTD Total	**297,084**	**4,375**	**1.5%**	**2,462**	**0**	**2,462**	**56.3%**	**0.8%**

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

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

	A	B	C	D	E	F	G
1	**CARE Table 4 - CARE Self-Certification and Self-Recertification Applications[1]**						
2	**SDG&E**						
3	**August 2019**						
4		**Provided**	**Received**	**Approved**	**Denied**	**Pending/Never Completed**	**Duplicates**
5	Total (Y-T-D)	109,431	114,539	49,748	11,026	1,472	52,293
6	Percentage		100%	43%	10%	1%	46%
7							
8	[1] Includes sub-metered.						
9	Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.						

	A	B	C	D	E	F	G	H	I	J
1	**CARE Table 5 - Enrollment by County**									
2	**SDG&E**									
3	**August 2019**									
4	**County**	**Estimated Eligible Households**			**Total Households Enrolled**			**Penetration Rate**		
5		**Urban**	**Rural**	**Total**	**Urban**	**Rural**	**Total**	**Urban**	**Rural**	**Total**
6	Orange	19,168	0	19,168	12,593	0	12,593	66%	NA	66%
7	San Diego	292,139	7,818	299,957	278,151	6,340	284,491	95%	81%	95%
8	**Total**	**311,307**	**7,818**	**319,125**	**290,744**	**6,340**	**297,084**	**93%**	**81%**	**93%**
9										
10										
11	Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.									

	A	B	C	D	E	F	G	H
1	**CARE Table 6 - Recertification Results**							
2	**SDG&E**							
3	**August 2019**							
4	**Month**	**Total CARE Households**	**Households Requested to Recertify[1]**	**% of Households Total (C/B)**	**Households Recertified[2]**	**Households De-enrolled[3]**	**Recertification Rate % [4] (E/C)**	**% of Total Households De-enrolled (F/B)**
5	January	293,548	4,687	1.6%	3,158	1,370	63.2%	0.4%
6	February	291,924	3,618	1.2%	2,505	1,006	66.5%	0.3%
7	March	291,637	3,673	1.3%	2,451	1,073	63.5%	0.3%
8	April	292,454	3,618	1.2%	2,539	967	69.0%	0.1%
9	May	293,441	2,827	1.0%	1,751	671	32.8%	0.0%
10	June	293,399	3,488	1.2%	2,024	249	11.4%	0.0%
11	July	295,472	3,570	1.2%	1,621	123	45.4%	0.0%
12	August	297,084	4,177	1.4%	629	38	15.1%	0.0%
13	September							
14	October							
15	November							
16	December							
17	**YTD**	**297,084**	**29,658**	**10.0%**	**16,678**	**5,497**	**56.2%**	**1.9%**
18								
19								
20	**Note:** Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.							

	A	B	C	D	E	F	G
1	**CARE Table 7 - Capitation Contractors[1]**						
2	**SDG&E**						
3	**August 2019**						
4	**Contractor**	**Contractor Type (Check one or more if applicable)**				**Total Enrollments**	
5							
6		**Private**	**CBO**	**WMDVBE**	**LIHEAP**	**Current Month**	**Year-to-Date**
7	211 SAN DIEGO (SD)		X			168	1,548
8	ALLIANCE FOR AFRICAN ASSISTANCE		X			-	1
9	AMERICAN RED CROSS WIC		X	X		1	17
10	CATHOLIC CHARITIES		X			1	9
11	CHULA VISTA COMM COLLABORATIVE		X			1	21
12	COMMUNITY RESOURCE CENTER - 2010		X			-	6
13	DEAF COMMUNITY SERVICES		X			-	-
14	HEARTS AND HANDS TOGETHER		X			-	-
15	INTERFAITH COMMUNITY SERVICES		X			-	7
16	LA MAESTRA FAMILY CLINIC (LMFC)		X			-	31
17	MAAC PROJECT - CARE		X			-	18
18	NEIGHBORHOOD HEALTH CARE		X		X	1	11
19	NEIGHBORHOOD HEALTH INSURANCE CENTER		X			-	-
20	NORTH COUNTY HEALTH SERVICES	X				4	23
21	SAN DIEGO STATE UNIVERSITY WIC		X			18	130
22	SAN YSIDRO HEALTH CENTERS		X			-	-
23	SCRIPPS HEALTH WIC (SHW)		X			-	8
24	UNION OF PAN ASIAN COMMUNITIES (UPAC)		X			-	-
25	VISTA COMMUNITY CLINIC		X			-	1
26	**Total Enrollments**		X			**194**	**1,831**
27							
28	Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.						

	A	B	C	D	E	F	G	H	I
1	**CARE Table 8 - Households as of Month-End**								
2	**SDG&E**								
3	**August 2019**								
4	**Month**	**Gas and Electric**	**Gas Only**	**Electric Only**	**Total**	**Eligible Households[1]**	**Penetration**	**% Change**	**Total Residential Accounts[2]**
5	January	174,138	N/A	119,410	293,548	319,125	92%	-1.3%	1,297,665
6	February	172,835	N/A	119,089	291,924	319,125	91%	-0.7%	1,298,263
7	March	172,298	N/A	119,339	291,637	319,125	91%	0.0%	1,314,244
8	April	172,606	N/A	119,848	292,454	319,125	91%	0.1%	1,339,676
9	May	173,180	N/A	120,261	293,441	319,125	91%	0.3%	1,316,214
10	June	173,094	N/A	120,305	293,399	319,125	91%	0.2%	1,340,999
11	July	174,294	N/A	121,178	295,472	319,125	93%	1.1%	1,342,216
12	August	175,204	N/A	121,880	297,084	319,125	93%	0.5%	1,343,604
13	September		N/A						
14	October		N/A						
15	November		N/A						
16	December		N/A						
17	**YTD**	**175,204**	**N/A**	**121,880**	**297,084**	**319,125**	**93%**	**0.5%**	**1,343,604**
18									
19									
20	**Note**: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.								

	A	B	C	D	E
1	**CARE Program Table 9 - Expenditures for Pilots/CHANGES Program [1]**				
2	**SDG&E**				
3	**August 2019**				
4	**2019**	**Authorized 2019 Budget**	**Current Month Expenses**	**Expenses Since Jan. 1, 2019**	**% of 2019 Budget Expensed**
5		**Total**	**Total**	**Total**	**Total**
6					
7					
8	CHANGES Program	$ 265,103	$ -	$ 209,353	0%
9					
10					
11	**Total**	**$ 265,103**	**$ -**	**$ 209,353**	**0%**
12					
13					
14	**NOTE**: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.				

CARE Table 10 CHANGES One-On-One Customer Assistance Sessions San Diego Gas & Electric	
Reporting Period July 2019[1]	
No. of attendees at education sessions	**30**
Disputes	
Add Level Pay Plan	0
Assisted with CARE Re-Certification/Audit	0
Changed 3rd party Company/Gas Aggregation	0
Changed 3rd Party Electricity Aggregation	0
Medical Baseline Application	0
Enroll in Energy Assistance Programs	0
Request Meter Service or Testing	2
Request Bill Adjustment	1
Request Customer Service Visit	0
Schedule Energy Audit	0
Payment Extension	0
Payment Plan	0
Solar	0
Stop Disconnection	3
Time of Use	0
Wildfire Related Issue	0
Total disputes [3]	**6**

Needs Assistance	
Add Level Pay Plan	0
Assisted with CARE Re-Certification/Audit	0
Assisted with Changes to Account	0
Energy Efficiency Tool	0
Assisted High Energy User with CARE Doc Submissior	0
Assisted with Reconnection	0
Billing Language Changed	0
Consumer Education Only	0
Electricity Aggregation	0
Energy Allerts	0
Enrolled in Demand Response Programs	0
ESAP	0
HEAP	0
Medical Baseline	0
Neighbor to Neighbor	7
REACH	0
Reported Safety Problem	0
Reported Scam	0
Set Up 3rd Party Notification	0
Set Up New Account	0
Payment Extension	0
Payment Plan	0
Wildfire Related Issue	0
Total Needs Assistance [2]	**7**

Education: Education sessions were held in a mix of one on one, and group sessions. Education materials are available as fact sheets on the CPUC Website: http://consumers.cpuc.ca.gov/team_and_changes/

Disputes & Needs Assistance -Support was provided in the following languages: English, Spanish

[1] There is a one-month lag behind the current reporting month. The data for August will be reported once received.
[2] Contractor is in the process of validating the total. If there is a discrepancy in the numbers reported, the numbers will be corrected in the August 2019 report.
[3] Per CHANGES Vendor: The total number of services may exceed the total number of cases because some cases will include more than one service provided.
* Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.

CARE Table 11 CHANGES Group Customer Assistance Sessions

SDG&E

Q1 May 1, 2019 - July 31, 2019 [1,2]

Date[3]	Session Language	Description of Service Provided (e.g. utility bill assistance, utility bill dispute resolution, and other energy related issues)	Session Logistics			
			# of Sessions	Length (Hours)[4]	Number of Attendees	Description of Information / Literature Provided
N/A	Arabic	Avoiding Disconnection	4	N/A	29	CHANGES Ed Handout
N/A	English	Avoiding Disconnection	5	N/A	31	CHANGES Ed Handout
N/A	Farsi	Avoiding Disconnection	3	N/A	8	CHANGES Ed Handout
N/A	French	Avoiding Disconnection	1	N/A	5	CHANGES Ed Handout
N/A	Pashto	Avoiding Disconnection	2	N/A	2	CHANGES Ed Handout
N/A	Portuguese	Avoiding Disconnection	1	N/A	2	CHANGES Ed Handout
N/A	Spanish	Avoiding Disconnection	2	N/A	6	CHANGES Ed Handout
N/A	Swahili	Avoiding Disconnection	2	N/A	11	CHANGES Ed Handout
N/A	English	Energy Conservation	1	N/A	19	CHANGES Ed Handout
N/A	Spanish	Energy Conservation	1	N/A	30	CHANGES Ed Handout
N/A	Arabic	Understanding Your Bill	1	N/A	5	CHANGES Ed Handout
N/A	French	Understanding Your Bill	1	N/A	5	CHANGES Ed Handout
N/A	Spanish	Understanding Your Bill	1	N/A	30	CHANGES Ed Handout
Current Month			25		183	
Year-to-Date			25		183	

[1] This table was provided by CHANGES contractor, Self Help for the Elderly, via CSID. This table was edited and reformatted from its original version in order to have a more consistent appearance and format with existing SDG&E tables.

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

[3] Date of the workshops not available.

[4] Contractor states all sessions last at least 30 minutes.

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.