

**BEFORE THE PUBLIC UTILITIES COMMISSION
OF THE STATE OF CALIFORNIA**

Application of Southern California Edison
Company (U 338E) for Approval of its Energy
Savings Assistance and California Alternate Rates
for Energy Programs and Budgets for Program
Years 2015-2017.

And Related Matters.

Application 14-11-007
(Filed November 18, 2014)

Application 14-11-009
Application 14-11-010
Application 14-11-011

**MONTHLY REPORT OF SAN DIEGO GAS & ELECTRIC COMPANY (U 902 M) ON
LOW-INCOME ASSISTANCE PROGRAMS FOR JULY 2020**

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San Diego Gas & Electric Company

Energy Savings Assistance (ESA) Program

And

California Alternate Rates for Energy (CARE)

Program

TABLE OF CONTENTS

1.	ESA PROGRAM EXECUTIVE SUMMARY.....	1
1.1	<i>ESA Program Overview</i>	1
1.1.1	Provide a summary of the ESA Program elements as approved in Decision D.) 16-11-022.	2
1.2	<i>ESA Program Customer Outreach and Enrollment Update.....</i>	2
1.2.1	Provide a summary of the ESA Program outreach and enrollment strategies deployed this month.	2
1.2.2	Customer Assistance Marketing, Education and Outreach for the CARE and ESA Programs.	4
	General Awareness Marketing	5
	Community Outreach & Engagement	8
	Other Customer Engagement Efforts.....	11
1.3	<i>Leveraging Success Evaluation, Including CSD.....</i>	12
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?	14
1.4	<i>Workforce Education & Training (WE&T)</i>	14
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.	14
1.5	<i>Miscellaneous</i>	14
1.5.1	ESA Program Studies.....	14
1.5.2	ESA Program Pilot	15
	SDG&E is not currently conducting any pilots.	15
2.	CARE EXECUTIVE SUMMARY.....	16
2.1	<i>CARE Program Summary.....</i>	16
2.1.1	Please provide CARE Program summary costs.	16
2.1.2	Provide the CARE Program penetration rate to date.	16
2.2	<i>Outreach</i>	17
2.2.1	Discuss utility outreach activities and those undertaken by third parties on the utility's behalf.	17
	Direct Marketing.....	17
	Community Outreach & Engagement	18

2.3	<i>CARE Recertification Complaints</i>	20
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.	20
3.	CHANGES REPORTING	20
4.	APPENDIX A – ESA AND CARE PROGRAM TABLES	21

ENERGY SAVINGS ASSISTANCE PROGRAM MONTHLY REPORT

1. ESA PROGRAM EXECUTIVE SUMMARY

1.1 ESA Program Overview

COVID-19 Program Impacts

SDG&E notified contractors that the Post Pandemic Return to Service (PPRS) credit earning period, originally scheduled to begin on July 15, per notification sent on June 15, would not begin until a date to be determined.¹ A PPRS credit start date is still being evaluated, however, the required 30-day notice will be sent to ESA Contractors prior to the start of the new PPRS credit earning period.²

In July, four of the five Outreach and Assessment (O&A) contractors continued in-home treatments, with the fifth contractor preparing to resume operations in August. ESA Program treatments continued to be sluggish in July, with only 285 homes treated and 87³ customers receiving In-home Energy Education only. In late July, SDG&E's primary O&A contractor began scheduling in-home visits for customers initially enrolled through phone enrollments. More time is needed to collect the necessary information for determining the success of these efforts.

¹ See Resolution E-5074 at 10 ("The IOUs should provide a 30 day advance notice to contractors of when the six-month PPRS credit-earning period begins.")

² *Id.*

³ Customers enrolled through phone enrollment efforts receive In-Home Energy Education and are not considered homes treated until measures are installed. The Year-to-Date (YTD) information is reflected in ESA Table 7B of the monthly reporting tables.

Footnote continued on next page

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

ESA Program Summary through July 2020			
	2020 Authorized / Planning Assumptions	Actual to Date⁴	%
Budget ⁵	\$35,509,153	\$9,487,939	27%
Homes Treated ⁶	23,761	4,800	20%
kWh Saved	7,220,000	518,296	7%
kW Demand Reduced	3,954	69	2%
Therms Saved	420,000	13,949	3%
GHG Emissions Reduced (Tons)	6,428	367	6%

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 July. Joint CARE and ESA Programs marketing, education and outreach efforts are provided in section 1.2.2 below.

⁴ Energy, demand, emissions savings reflects total savings from the ESA Program including California Department of Community Services and Development (CSD) leveraging and multifamily common area measure installations.

⁵ Budget authorized in approval of SDG&E Advice Letter 3250-E/2688-G dated December 27, 2018 for program years 2019 and 2020.

⁶ Total homes treated reflects homes that have been invoiced and paid and also includes CSD leveraging.

ESA Program Contractor Outreach

SDG&E's Outreach and Assessment (O&A) contractors continue to be impacted by COVID-19, however, enrollment efforts improved in July. In lieu of door-to-door outreach, ESA Contractors are using phone contacts to both enroll and schedule in-home appointments. Contractors are seeing a significant increase over the previous month in customers who are electing to complete the enrollment process in-home versus over the phone. Contractors were able to successfully enroll 629 customers in July.⁷

ESA Program Multifamily Common Area Measure (MF CAM) Initiative

In July 2020, SDG&E's ESA Program MF CAM implementer continued targeted marketing to potential ESA MF CAM properties, including re-syndication projects in SDG&E's service territory. To date, 32 properties have been treated in 2020 and 8 properties are currently receiving measure installations. In addition, there are a total of 15 properties pending energy assessments/audits. There have been minimal COVID-19 related impacts to the ongoing operations of the ESA MF CAM initiative as work can be completed via phone or email and ongoing MF CAM installations can be completed without contractor contact with other people.

Information on the MF CAM initiative, including eligibility requirements,

⁷ Enrollments are based on date of enrollment and may not be represented in the monthly reporting tables.

program flow, and contact information for Willdan Energy, SDG&E’s implementer, is available on SDG&E’s website page at <https://www.sdge.com/businesses/savings-center/esa-common-area-measures-program>.

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 July, four customers were served by the Language Line.

Language	Calls
Arabic	4
TOTAL	4

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

Marketing, Education and Outreach (ME&O) activities summarized below represent joint efforts on behalf of the CARE and ESA Programs. SDG&E utilizes an integrated ME&O strategy by connecting with customers using general awareness marketing, direct marketing, and community outreach and engagement. The intent of the 2020 campaign 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,

streaming radio, outdoor, print, digital (including paid search), email, direct mail and bill inserts, as well as a robust outreach program. In response to the COVID-19 pandemic, SDG&E implemented a number of changes to its customer assistance program ME&O efforts which will have an impact on ongoing campaign planning for these programs.⁸

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 July 2020 are summarized in the following sections:

Print Advertising:

SDG&E planned English print advertising in rural communities and African-American publications. Additionally, SDG&E is running print in Chinese, Vietnamese, Tagalog (Filipino) and Spanish language publications. For the month of July, the messaging in SDG&E's ads has continued to focus on those who are recently unemployed or in need due to the COVID-19 pandemic. The ads have an overall Customer Assistance message with information on where to get help rather than focusing specifically on CARE or ESA.

⁸ *Id.*

Outdoor Advertising

SDG&E added a no-cost digital outdoor board (13' x 46') that will run from May through July 2020. This digital board faces both north and south and receives approximately 112,907 daily impressions on each side the freeway. There are two versions of the creative that will run in an equal (50/50) rotation. One creative directs customers to *sdge.com/assistance* for additional information about SDG&E customer assistance programs. The second creative directs customers to *2-1-1 San Diego* for additional information about the Low Income Home Energy Assistance Program (LIHEAP) program.

Online Advertising:

In 2020, SDG&E planned a digital advertising campaign that began in February and will end in October. Paid Search began running February 2020 and garnered 79,027 impressions in July with a click-through-rate (CTR) of 25%. Paid Social for July had 634,648 impressions with a CTR of 2.2%. Banner Display Ads for July had 2,702,326 impressions with a CTR of 0.21%. Native online advertising had 413,353 impressions with a CTR of 0.05%. Due to the COVID-19 pandemic, ESA-specific online advertising continued to be on hold in lieu of the general assistance campaign that is focused on enrolling customers in CARE or the Family Electric Rate assistance (FERA) program. The Energy Savings Assistance program (ESA) leverages customer leads from the CARE online enrollment process. All banner and paid social media messaging has been updated to reflect this new direction.

Social Media:

Using e-newsletters, website posts and social media channels, the Energy Solutions Partner Network shared 155 Customer Assistance messages in July to an audience of more than 332,000 followers. SDG&E’s social media profile also posts messaging to an audience of more than 40,000 followers. These messages are then able to be redistributed to other networks on social media.



Direct Marketing

In July 2020, direct marketing efforts included the following tactics:

Live CARE Call Campaign:

SDG&E's third-party contractor, The Harris Group (THG), called targeted customers to enroll in the CARE Program.⁹ The campaign provides SDG&E with a way to directly connect with customers in low-income and hard-to-reach areas. THG provides education about the CARE and ESA Programs and assists customers in completing program application forms. Outbound call activities in July 2020 generated the following numbers:

The Harris Group	
ESA Leads	0
CARE Enrollments	2,627
CARE Recertifications ¹⁰	2

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 territory. A majority of these organizations are small, grassroots agencies

⁹ THG is a Diverse Business Enterprise (DBE) vendor and a woman-owned business.

¹⁰ CARE recertifications received were requested by SDG&E prior to customer protections which suspended recertifications on March 4, 2020. Since March 4, no customers are required to recertify and SDG&E has not removed any customers from the CARE program resulting from recertification.

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 July 2020, SDG&E’s partner outreach activities resulted in the following activities:

Energy Solutions Partner Network	
ESA Leads	1
CARE Enrollments	15
CARE Recertifications ¹¹	1

Partner Spotlight:

This month’s events and presentations were mostly canceled due to COVID-19, while some events were created/modified. In July 2020, the SDG&E Customer Solutions Outreach Team participated in 19 events, presentations, and trainings/workshops, 6 of which were virtual, that featured information and enrollment in energy solutions programs, services and tools. Many of these activities were hosted by SDG&E’s partner network and included drive through events, such as food drives, where information was shared in a safe manner.

¹¹CARE recertifications received were requested by SDG&E prior to customer protections which suspended recertifications on March 4, 2020. Since March 4, no customers are required to recertify and SDG&E has not removed any customers from the CARE program resulting from recertification.

Outreach activities were focused around engaging customers with solutions such as the CARE and ESA Programs and reached over 2,063 people in July.

Cesar Chavez Elementary

On July 8th and 15th, Cesar Chavez Elementary conducted a series of book fair events for children and their families. Parents who attended the events were able to pick up books for their kids to read at home and the school staff also distributed CARE applications to attendees.



CREER Comunidad y Familia

In July, Cree Responsabilizate Educate Esfuerzate Realiza (CREER) Comunidad y Familia, an organization to develop children, youth and families through educational, cultural, arts, sports and civic leadership programs in San Juan Capistrano held weekly events. At these events, food was distributed to families

in need, along with SDG&E customer assistance information to interested customers.

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, Chinese, Aramaic/Arabic, and other languages as requested. During July 2020, SDG&E did not participate in any multicultural community outreach events due to the COVID-19 pandemic.

Other Customer Engagement Efforts

Subject to SDG&E COVID-19 pandemic response addressed above in section 1.2.2, 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 (CCC) and Payment Offices, as well as the distribution of materials through other SDG&E customer-facing groups/programs and field services teams. Updated information as it relates to ongoing customer engagement and the impacts of the COVID-19 pandemic will continue to be provided in subsequent monthly reports.

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, the Outreach team assists at Branch Office locations on a seasonal basis to help enroll customers. On March 20, SDG&E closed the branch offices to the public over concern of the COVID-19 pandemic. Customers were urged to contact SDG&E’s CCC or go online to resolve utility issues.

In D.16-06-054, SDG&E received Commission authorization for its CCC’s Energy Service Specialists to enroll customers directly into the CARE Program over the telephone. In July 2020, SDG&E’s CCC and Branch Office generated the following applications and leads over the phone:

	CCC	Branch Office
ESA Leads	4	4
CARE Enrollments	3	0
CARE Recertifications	0	0

1.3 Leveraging Success Evaluation, Including CSD

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 July, SDG&E was contacted by GRID Alternatives requesting to propose a new semi-annual process for providing leads to SDG&E, where GRID Alternatives would provide a list of accounts to SDG&E to generate potential leads for customers who have not recently been treated through ESA. In July, SDG&E received a list of approximately 240 accounts from GRID Alternatives, which created 180 leads and successful enrollment of one customer through this effort.

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. One lead was generated for GRID Alternatives for the month of July.

As part of SDG&E's 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. This agreement will continue until December 31, 2020 or until SDCWA's funds are exhausted. In July, SDG&E submitted an invoice to SDCWA for 6,767 water saving measures that totaled to \$12,587.

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 continues to partner closely with local Low-Income Home Energy Assistance Program (LIHEAP) agencies to improve leveraging opportunities between CSD's LIHEAP and the ESA Program. One LIHEAP contractor continued enrollment efforts and conducting in-home visits and the other contractor continued working on a transition and training and plans to resume operations in August. LIHEAP agencies have also received additional payment assistance funding, which is expected to increase the leveraging opportunities between the two programs. In July, LIHEAP organizations generated 41 leads for the ESA Program and enrolled 23 customers.

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 did not conduct any training in conjunction with WE&T efforts in July 2020.

1.5 Miscellaneous

1.5.1 ESA Program Studies

2022 LINA

Southern California Edison Company (SCE) posted a notice of this study, on behalf of the IOUs, for potential bidders on their Proposal Evaluation & Proposal

Management Application (PEPMA) website and requested notification from interested bidders by July 20th. On July 21st the Low Income Oversight Board (LIOB) LINA Subcommittee met with the IOU study team and Energy Division (ED) for final work scope discussions.

NEB Assessment

The study team met weekly during July to review and discuss Apprise's preliminary assessment of the 2019 Non Energy Benefits (NEB) Study.

1.5.2 ESA Program Pilot

SDG&E is not currently conducting any pilots.

2. CARE EXECUTIVE SUMMARY

2.1 CARE Program Summary

2.1.1 Please provide CARE Program summary costs.

CARE Budget Categories	Authorized Budget ¹²	Actual Expenses to Date	% of Budget Spent
Outreach	\$3,254,171	\$1,625,920	50%
Proc., Certification and Verification	\$517,211	\$402,874	78%
Post Enrollment Verification	\$363,667	\$92,254	25%
Information Tech./Programming	\$1,719,900	\$412,415	24%
Pilots-CHANGES	\$267,733	\$150,982	56%
Regulatory Compliance	\$303,653	\$432,305	142%
General Administration	\$836,246	\$336,626	40%
CPUC Energy Division Staff	\$57,852	\$68,229	118%
Cooling Centers ¹³	\$0	\$(42,048)	0%
Total Expenses	\$7,320,433	\$3,479,557	48%
Subsidies and Benefits	\$74,571,504	\$72,617,572	97%
Total Program Costs and Discounts	\$81,891,937	\$76,097,130	93%

2.1.2 Provide the CARE Program penetration rate to date.

CARE Penetration		
Participants Enrolled	Eligible Participants ¹⁴	Penetration rate
326,137	302,245	108%

¹² Budget authorized in approval of SDG&E Advice Letter 3250-E/2688-G dated December 27, 2018 for program years 2019 and 2020.

¹³ The funding for SDG&E's Cool Zones is no longer under the CARE program. See D.17-12-009 at Ordering Paragraph 114. The \$(42,048) represents 2019 Cooling Centers expenses charged to the CARE program in 2019 and correctly removed in 2020 per D.17-12-009.

¹⁴ On March 17, 2020, Pacific Gas and Electric Company (PG&E), on behalf of the IOUs, filed the revised Annual Estimates of CARE Eligible Customers and Related Information. This number reflects estimates of SDG&E's CARE Eligible Participants for 2020, 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 July 2020, marketing and outreach efforts generated 4,473 completed CARE applications and 2,947 new enrollments/recertifications for the program. Below is a summary of CARE specific outreach efforts.

Direct Marketing

Direct Mail

In July 2020, SDG&E continued its rate comparison campaign by mailing a comparison letter to 14,715 potential CARE customers. The letter compares a customer's average bill total for the last 12 months 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.

Email

In July 2020, 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 July 2020, SDG&E sent out 131,314 emails (many of these reminders) which

generated a 27% open rate and a 4% click through rate over the course of the month.

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 19 social service agencies such as the Women’s Infant & Children Organization (WIC) program, refugee assimilation organizations, 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 LEP audiences and provide multilingual staffing. During the month of July, the following numbers were generated by the Capitation Agencies:

Capitation Agencies	
ESA Leads	92
CARE Enrollments	164
CARE Recertifications ¹⁵	1

Cool Zones

Cool Zones are typically active from May 15 through October 31 of each year. As of July, the County of San Diego opened seven Cool Zone locations within State safety guidelines. As of July, 282 fans were distributed to customers and the County of San Diego had over 470 inquiries about Cool Zones.

Women’s Infant & Children Organizations

In July, WIC offices were closed to in-person interactions because of COVID-19. The WIC offices, however, continue to field questions from their clientele via phone.

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

¹⁵ CARE recertifications received were requested by SDG&E prior to customer protections which suspended recertifications on March 4, 2020. Since March 4, no customers are required to recertify and SDG&E has not removed any customers from the CARE program resulting from recertification.

Footnote continued on next page

offices include a source coded CARE application in their new client intake packets. In July 2020, the following applications were received:

HHSA	July	YTD
ESA Leads	0	0
CARE Enrollments	75	724
CARE Recertifications ¹⁶	4	325

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 July 2020, 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 June 2020. As of June 1st, 2020, CARE Table 11 reports have moved from monthly to quarterly for the 2020-2021 CHANGES Program contract year. July 2020 activity for CARE Table 10 and Q1 June-August CARE Table 11 data will be reported in a subsequent report.¹⁷

¹⁶ The CARE recertifications received were requested by SDG&E prior to customer protections which suspended recertifications on March 4, 2020. Since March 4, no customers are required to recertify and SDG&E has not removed any customers from the CARE program resulting from recertification.

¹⁷ SDG&E provides data from the previous month due to reporting delays from CHANGES which prevents SDG&E from reporting current month activity.

4. APPENDIX A – 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 (CSD Leveraging)

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

ESA Program – Table 2B-1 – Eligible Common Area Measures List

ESA Program - Table 3A & 3B - Average Bill Savings per Treated Home/Common Area

ESA Program - Table 4A-1, 4B & 4C– Homes/Buildings Treated

ESA Program - Table 4A-2 - Homes Unwilling/Unable to Participate

ESA Program - Table 5A, 5B & 5C - 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

**Energy Savings Assistance Program Table 1 - Expenses
SDG&E
July 2020**

ESA Program:	Authorized Budget [1] [2]			Current Month Expenses [4]			Year to Date Expenses			% of Budget Spent YTD		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Energy Efficiency												
Appliances [3]	\$ 854,260	\$ 319,825	\$ 1,174,085	\$ 22,423	\$ 9,657	\$ 32,080	\$ (26,637)	\$ 269,740	\$ 243,103	-3%	84%	21%
Domestic Hot Water	\$ 65,958	\$ 2,132,630	\$ 2,198,588	\$ 2,473	\$ 79,964	\$ 82,437	\$ 12,363	\$ 399,750	\$ 412,113	19%	19%	19%
Enclosure	\$ 2,560,350	\$ 3,393,952	\$ 5,954,302	\$ 29,205	\$ 38,713	\$ 67,918	\$ 250,820	\$ 332,482	\$ 583,302	10%	10%	10%
HVAC	\$ 427,358	\$ 3,727,353	\$ 4,154,711	\$ 11,756	\$ 107,663	\$ 119,419	\$ 71,076	\$ 830,852	\$ 901,928	17%	22%	22%
Maintenance	\$ 7,063	\$ 291,617	\$ 298,680	\$ -	\$ 7,722	\$ 7,722	\$ -	\$ 35,504	\$ 35,504	0%	12%	12%
Lighting	\$ 4,642,829	\$ -	\$ 4,642,829	\$ 95,140	\$ -	\$ 95,140	\$ 1,086,563	\$ -	\$ 1,086,563	23%	0%	23%
Miscellaneous	\$ 1,775,159	\$ -	\$ 1,775,159	\$ 12,091	\$ -	\$ 12,091	\$ 233,352	\$ -	\$ 233,352	13%	0%	13%
Customer Enrollment	\$ 2,195,740	\$ 2,195,740	\$ 4,391,481	\$ 65,853	\$ 65,853	\$ 131,707	\$ 765,316	\$ 765,316	\$ 1,530,632	35%	35%	35%
In Home Education	\$ 348,433	\$ 348,433	\$ 696,865	\$ 11,617	\$ 11,617	\$ 23,234	\$ 136,986	\$ 136,986	\$ 273,971	39%	39%	39%
Pilot	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Energy Efficiency TOTAL [4]	\$ 12,877,149	\$ 12,409,550	\$ 25,286,700	\$ 250,558	\$ 321,189	\$ 571,748	\$ 2,529,839	\$ 2,770,630	\$ 5,300,469	20%	22%	21%
Training Center	\$ 249,089	\$ 249,089	\$ 498,179	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Inspections	\$ 90,210	\$ 90,210	\$ 180,420	\$ 7,441	\$ 7,441	\$ 14,882	\$ 48,661	\$ 48,661	\$ 97,322	54%	54%	54%
Marketing and Outreach	\$ 600,000	\$ 600,000	\$ 1,200,000	\$ 18,704	\$ 18,704	\$ 37,408	\$ 379,739	\$ 379,739	\$ 759,478	63%	63%	63%
Statewide Marketing Education and Outreach	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Studies	\$ 17,083	\$ 17,083	\$ 34,166	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Regulatory Compliance [5]	\$ 168,266	\$ 168,266	\$ 336,532	\$ 71,394	\$ 71,394	\$ 142,787	\$ 230,441	\$ 230,441	\$ 460,882	137%	137%	137%
General Administration [6]	\$ 1,368,601	\$ 1,368,601	\$ 2,737,202	\$ 46,511	\$ 46,511	\$ 93,022	\$ 981,618	\$ 981,617	\$ 1,963,235	72%	72%	72%
CPUC Energy Division	\$ 23,877	\$ 23,877	\$ 47,754	\$ 4,283	\$ 4,283	\$ 8,566	\$ 14,621	\$ 14,621	\$ 29,241	61%	61%	61%
Reallocation (ME&O budget reduced from \$1.2M)	\$ 343,848	\$ 343,848	\$ 687,695	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
TOTAL PROGRAM COSTS	\$ 15,738,123	\$ 15,270,524	\$ 31,008,648	\$ 398,891	\$ 469,522	\$ 868,413	\$ 4,184,919	\$ 4,425,709	\$ 8,610,628	27%	29%	28%
Funded Outside of ESA Program Budget												
Indirect Costs				\$ 48,462	\$ 48,834	\$ 97,296	\$ 296,080	\$ 297,391	\$ 593,471			
NGAT Costs		\$ 288,000	\$ 288,000		\$ 8,770	\$ 8,770		\$ 45,450	\$ 45,450		16%	16%

[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.

[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.

[3] Negative YTD electric amount due to the correction of 2019 expense incorrectly charged to electric and reclassified to gas.

[4] Current Month Expenses for Energy Efficiency Total includes March accruals and/or re-accruals of \$326,913 in the following reporting categories: Appliances \$0; Domestic Hot Water \$10,318; Enclosure \$14; HVAC \$25,496; Maintenance \$8,057; Lighting \$65,829; Miscellaneous \$20,341; Customer Enrollment \$167,608; In Home Energy Education \$29,249.

[5] As lead IOU, SDG&E expensed the full invoice amount for the disaggregated load profile project and reimbursements from the other IOU's are forthcoming. The total expense will decrease as SDG&E's portion for this project is \$10.3%.

[6] Includes a total of \$994,541 for COVID 19 Advanced Payments to the following contractors: THA \$86,720; CUI \$32,000; Jerry's Heating & Air \$54,002; RHA \$205,120; Eagle Systems \$205,509; Amer Insulation/Amer Eco \$411,190.

A total of \$174,500 was returned from the following contractors: \$87,672 RR&B Wholesale Distribution; \$53,278 Jerry's Heating & Air; \$33,550 Reliable Energy Mgmt

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
July 2020

ESA Program [1]:	Authorized Budget [2]			Current Month Expenses			Year to Date Expenses			% of Budget Spent YTD		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Energy Efficiency												
Multi-Family Common Area Measures	\$ 1,767,500	\$ 1,767,500	\$ 3,535,000	\$ 67,701	\$ 67,701	\$ 135,402	\$ 401,686	\$ 401,686	\$ 803,371	23%	23%	23%
In-Home Education	\$ 185,912	\$ 185,912	\$ 371,824	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Leveraging - CSD [3]	\$ 241,216	\$ 241,216	\$ 482,431	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Pilot [4] [5]	\$ 25,000	\$ 25,000	\$ 50,000	\$ -	\$ -	\$ -	\$ (1,500)	\$ (1,500)	\$ (3,000)	-6%	-6%	-6%
Studies [6] [7]	\$ 30,625	\$ 30,625	\$ 61,250	\$ 11,604	\$ 11,604	\$ 23,207	\$ 38,470	\$ 38,470	\$ 76,940	126%	126%	126%
Regulatory Compliance												
General Administration												
TOTAL PROGRAM BUDGET/EXPENSES	\$ 2,250,253	\$ 2,250,253	\$ 4,500,505	\$ 79,305	\$ 79,305	\$ 158,609	\$ 438,656	\$ 438,656	\$ 877,311	19%	19%	19%

[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 supporting CSD's LIWP program

[4] Funding authorized for Programmable Communicating Thermostat (PCT) Pilot.

[5] Negative YTD amount is the result of 2019 expense related to thermostats reclassified to Marketing and Outreach (Table 1) in PY2020.

[6] Funding authorized for Rapid Feedback Research and Analysis and Potential and Goals Study.

[7] YTD total includes \$30.5K correction of 2019 expense incorrectly charged to General Administration (Table 1) and reclassified to Rapid Feedback Research and Analysis in PY2020.

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
July 2020**

ESA Program - CSD Leveraging							
Measures	Units	Year-To-Date Completed & Expensed Installation					
		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
 [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:

[4] Microwave savings are from ECONorthWest Study received in December of 2011.

Energy Savings Assistance Common Area Measures Program Table 2B
SDG&E
July 2020

Table 2B ESA Program - Multifamily Common Area Measures⁵							
		Year-To-Date Completed & Expensed Installation					
ESA CAM Measures[1]	Units (of Measure such as "each")	Quantity Installed	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses (\$)	% of Expenditure
Appliances							
Domestic Hot Water							
Central Boiler	Cap-kBTUh	500	-	-	1545	22,480	
Faucet Aerator	Each	9	207	0	23	\$ 68	
Pipe Insulation	Home	3	-	-	26	\$ 2,378	
Envelope							
HVAC							
AC Tune-up	Cap-Tons	77	1,109	1	10	\$ 9,480	
Furnace Replacement	Cap-kBTUh	148	-	-	45	\$ 2,368	
HEAT Pump Split System	Cap-Tons	10	404	0	(0)	\$ 18,526	
HEAT Pump Split System	Each	5	77	0	(0)	\$ 8,337	
Programmable Thermostat	Each	4	335	-	19	\$ 1,160	
Lighting							

**Energy Savings Assistance CAM Program Table 2B-1, Eligible Common Area Measures
List
SDG&E
July 2020**

Common Area Measures Category and Eligible Measures Title [1]	Effective Date	End Date[2]	Eligible Climate Zones [3]
Appliances			
Domestic Hot Water			
Pipe Insulation	18-May		6, 7, 8, 10, 14, 15
Faucet Aerator	18-May		6, 7, 8, 10, 14, 15
Central Boiler	18-May		6, 7, 8, 10, 14, 16
Envelope			
HVAC			
AC Tune-up	18-May		6, 7, 8, 10, 14, 15
Furnace Replacement	18-May		6, 7, 8, 10, 14, 15
HEAT Pump Split System	18-May		6, 7, 8, 10, 14, 15
HEAT Pump Split System	18-May		6, 7, 8, 10, 14, 15
Programmable Thermostat	18-May		6, 7, 8, 10, 14, 15
Lighting			
Exterior LED Lighting	18-May		6, 7, 8, 10, 14, 15
Interior LED Lighting	18-May		6, 7, 8, 10, 14, 15
Interior TLED Type A Lamps	18-May		6, 7, 8, 10, 14, 15
Interior TLED Type C Lamps	18-May		6, 7, 8, 10, 14, 15
Interior LED Exit Sign	18-May		6, 7, 8, 10, 14, 15
Interior LED Fixture	18-May		6, 7, 8, 10, 14, 15
Interior LED Screw-in	18-May		6, 7, 8, 10, 14, 15
Exterior LED Lighting - Pool	18-May		6, 7, 8, 10, 14, 15
Miscellaneous			
Tier-2 Smart Power Strip	18-May		6, 7, 8, 10, 14, 15
Variable Speed Pool Pump	18-May		6, 7, 8, 10, 14, 15

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

	A	B
1	Energy Savings Assistance Program Tables 3A-B - Energy Savings and Average Bill Savings per Treated Home/Common Area	
2	SDG&E	
3	July 2020	
4		
5	Table 3A-1, ESA Program	
6	Annual kWh Savings	518,296
7	Annual Therm Savings	13,949
8	Lifecycle kWh Savings	4,587,864
9	Lifecycle Therm Savings	64,531
10	Current kWh Rate	\$ 0.18
11	Current Therm Rate	\$ 1.08
12	Average 1st Year Bill Savings / Treated households	\$ 21.57
13	Average Lifecycle Bill Savings / Treated Household	\$ 178.24
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	518,296
29	Annual Therm Savings	13,949
30	Lifecycle kWh Savings	4,587,864
31	Lifecycle Therm Savings	64,531
32	Current kWh Rate	\$ 0.18
33	Current Therm Rate	\$ 1.08
34	Average 1st Year Bill Savings / Treated Households	\$ 21.57
35	Average Lifecycle Bill Savings / Treated Households	\$ 178.24
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	428,693
41	Annual Therm Savings	(184)
42	Lifecycle kWh Savings	4,234,912
43	Lifecycle Therm Savings	10,767
44	Current kWh Rate	\$0.18
45	Current Therm Rate	\$1.08
46	Average 1st Year Bill Savings / Treated Property	\$ 2,863.25
47	Average Lifecycle Bill Savings / Treated Property	\$ 28,790.03
48		
49		

	A	B	C	D	E	F	G
1	Energy Savings Assistance Program Table 4 - Homes/Buildings Treated						
2	SDG&E						
3	July2020						
4							
5	Table 4A-1, ESA Program						
6		Eligible Households			Households Treated YTD		
7	County	Rural [1]	Urban	Total	Rural	Urban	Total
8	Orange	0	14,986	14,986	0	280	280
9	San Diego	6,141	282,825	288,966	185	4,335	4,520
10	Total	6,141	297,811	303,952	185	4,615	4,800
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	0
18	Total				0	0	0
19							
20							
21	Table 4C, ESA Program - Multifamily Common Area						
22		*			Properties Treated YTD		
23	-				-	-	Total
24	-	-	-	-	-	-	-
25	-	-	-	-	-	32	32
26	Total				0	32	32
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.						
30	*Do not currently have Eligible Properties for ESA CAM						
31							
32							

Energy Savings Assistance Program Table 4A-2, Homes Unwilling / Unable to Participate
SDG&E
July 2020

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	32	9	0	0	246	0	53
San Diego	2,723	2,655	4	0	6,140	308	153
Total	2,755	2,664	4	0	6,386	308	206

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	N	O	P	Q	R	S	
1	Energy Savings Assistance Program Table 5 - Energy Savings Assistance Program Customer Summary																			
2	SDG&E																			
3	July 2020																			
4	Table 5A, ESA Program																			
5		Gas & Electric				Gas Only				Electric Only				Total						
6		# 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)			
7	Month		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW	# of First-Touch	# of Re-treatment	Therm
8	January	32	393	12,547	2	0	0	0	-	0	397	0	32	19	13	393	12,944	2		
9	February	298	2639	68,573	9	0	0	0	70	0	13,798	2	368	203	165	2,639	82,371	11		
10	March	780	3423	123770.19	16.04	0	0	0	271	0	47714.42	6.527	1,051	769	282	3,423	171,485	23		
11	April	2698	212,195	162746.72	21.86	0	0	0	158	0	9340.68	1.263	2,856	863	1993	212	172,087	23		
12	May	133	524.947	15394.37	1.986	0	0	0	4	0	1878.62	0.231	137	83	54	525	17,273	2		
13	June	68	2007.372	12188.5	1.613	0	0	0	3	0	1093.11	0.165	71	30	41	2,007	13,282	2		
14	July	275	4749.715	45953.85	5.936	0	0	0	10	0	2899.78	0.412	285	161	124	4,750	48,854	6		
15	August																			
16	September																			
17	October																			
18	November																			
19	December																			
20	YTD	4,284	13,949	441,174	58	-	-	-	516	-	77,121	11	4,800	2,128	2,672	13,949	518,296	69		
21	YTD Total Energy Impacts for all fuel types should equal YTD energy impacts that are reported every month Table 2.																			
22	Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.																			
23	Note: SDG&E tracks the measure savings based on the month and year of install. Households treated can have a value of zero, meaning the treated date is from a previous year but the measure install and savings were tracked in a new Program Year.																			
24																				
25																				
26	Table 5B, ESA Program - CSD Leveraging																			
27		Gas & Electric				Gas Only				Electric Only				Total						
28		# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Annual)					
29	Month		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW			
30	January																			
31	February																			
32	March																			
33	April																			
34	May																			
35	June																			
36	July																			
37	August																			
38	September																			
39	October																			
40	November																			
41	December																			
42	YTD	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0		
43	YTD Total Energy Impacts for all fuel types should equal YTD energy impacts that are reported every month Table 2A.																			
44	Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.																			
45																				
46																				
47																				
48	Table 5C, ESA Program - Multifamily Common Area																			
49		Gas & Electric				Gas Only				Electric Only				Total						
50		# of Properties Treated by Month	(Annual)			# of Properties Treated by Month	(Annual)			# of Properties Treated by Month	(Annual)			# of Properties Treated by Month	(Annual)					
51	Month		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW			
52	January	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-		
53	February	4	(174.31)	64,262.63	12.30	-	-	-	1	-	6,801.99	1.63	5	(174.31)	71,064.62	13.93				
54	March	5	(615.46)	144,491.00	30.84	-	-	-	1	-	16,208.98	2.53	6	(615.46)	160,699.98	33.37				
55	April	8	(258.96)	64,527.36	11.14	-	-	-	-	-	-	-	8	(258.96)	64,527.36	11.14				
56	May	3	(374.42)	63,636.91	14.70	-	-	-	-	-	-	-	3	(374.42)	63,636.91	14.70				
57	June	10	1,239.31	68,764.26	15.81	-	-	-	-	-	-	-	10	1,239.31	68,764.26	15.81				
58	July																			
59	August																			
60	September																			
61	October																			
62	November																			
63	December																			
64	YTD	30	(184)	405,682	85	-	-	-	2	-	23,011	4	32	(184)	428,693	89				
65	YTD Total Energy Impacts for all fuel types should equal YTD energy impacts that are reported every month Table 2B.																			
66	Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.																			
67																				
68																				

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

**SDG&E
July 2020**

7A - Households Receiving Second Refrigerators - YTD			
Measures	Units	Received Refrigerator	Not eligible for Refrigerator due to Less than Six Occupants
Second Refrigerators	Each	1	0

7B - Households Receiving In- Home Energy Education Only - YTD		
Measures	Units	Households that Only Received Energy Education
In-Home Education	Home	246

7C - Households for My Energy/My Account Platform - YTD		
Opt-Out	Already Enrolled	Opt-In
5,188	999	299

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	
1	CARE Table 2 - Enrollment, Recertification, Attrition, & Penetration⁵																									
2	SDG&E																									
3	July 2020																									
4		New Enrollment									Recertification				Attrition (Drop Offs)					Enrollment		Total CARE Participants	Estimated CARE Eligible⁵	Penetration Rate % (W/X)		
5		Automatic Enrollment				Self-Certification (Income or Categorical)					Total New Enrollment (E+J)	Scheduled	Non-Scheduled (Duplicates)	Automatic	Total Recertification (L+M+N)	No Response⁴	Failed PEV	Failed Recertification	Other	Total Attrition (P+Q+R+S)	Gross (K+O)				Net Adjusted (K-T)	
6		Inter-Utility¹	Intra-Utility²	Leveraging³	Combined (B+C+D)	Online	Paper	Phone	Capitation	Combined (F+G+H+I)																
7	January	70	172	0	242	4,368	1,307	343	246	6,264	6,506	3,911	3,620	4,130	11,661	1,443	66	171	5,606	7,286	18,167	-780	300,720	302,245	99%	
8	February	0	146	0	146	4,480	976	244	244	5,944	6,090	1,917	2,860	4,160	8,937	1,674	77	153	1,500	3,404	15,027	2,686	303,406	302,245	100%	
9	March	0	79	0	79	7,076	1,367	639	243	9,325	9,404	2,067	2,410	2,298	6,775	62	6	40	3,444	3,552	16,179	5,852	309,258	302,245	102%	
10	April	0	36	0	36	7,020	1,211	735	230	9,196	9,232	219	666	0	885	485	8	9	2,584	3,086	10,117	6,146	315,404	302,245	104%	
11	May	17	6	0	23	6,434	1,334	1,096	218	9,082	9,105	13	583	0	596	0	0	0	2,404	2,404	9,701	6,701	322,105	302,245	107%	
12	June	152	22	0	174	5,299	793	514	169	6,775	6,949	10	434	1	445	0	0	1	3,130	3,131	7,394	3,818	325,923	302,245	108%	
13	July	39	14	0	53	2,928	578	261	110	3,877	3,930	42	484	0	526	0	0	0	3,716	3,716	4,456	214	326,137	302,245	108%	
14	August				0					0	0				0					0				302,245	302,245	0%
15	September				0					0	0				0					0				302,245	302,245	0%
16	October				0					0	0				0					0				302,245	302,245	0%
17	November				0					0	0				0					0				302,245	302,245	0%
18	December				0					0	0				0					0				302,245	302,245	0%
19	YTD Total	278	475	0	753	37,605	7,566	3,832	1,460	50,463	51,216	8,179	11,057	10,589	29,825	3,664	157	374	22,384	26,579	81,041	24,637	326,137	302,245	108%	
20																										
21	¹ Enrollments via data sharing between the IOUs.																									
22	² Enrollments via data sharing between departments and/or programs within the utility.																									
23	³ Enrollments via data sharing with programs outside the IOU that serve low-income customers.																									
24	⁴ No response includes no response to both Recertification and Verification.																									
25																										
26																										
27	Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.																									
28																										

	A	B	C	D	E	F	G	H	I
1	CARE Table 3A - Post-Enrollment Verification Results (Model)								
2	SDG&E								
3	July 2020								
4	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
5	January	300,720	533	0.2%	8	53	61	11.4%	0.0%
6	February	303,406	179	0.1%	3	11	14	7.8%	0.0%
7	March	309,258	27	0.0%	0	0	0	0.0%	0.0%
8	April	315,404	0	0.0%	0	0	0	0.0%	0.0%
9	May	322,105	0	0.0%	0	0	0	0.0%	0.0%
10	June	325,923	0	0.0%	0	0	0	0.0%	0.0%
11	July	326,137	0	0.0%	0	0	0	0.0%	0.0%
12	August	0					0	0.0%	0.0%
13	September	0					0	0.0%	0.0%
14	October	0					0	0.0%	0.0%
15	November	0					0	0.0%	0.0%
16	December	0					0	0.0%	0.0%
17	YTD Total	326,137	739	0.2%	11	64	75	10.1%	0.0%
18									
19	¹ Includes all customers who failed SDG&E's CARE eligibility probability model.								
20	² Includes customers verified as over income or who requested to be de-enrolled.								
21	³ Verification results are tied to the month initiated and the verification process allows customers 90 days to respond to the verification request.								
22	⁴ Percentage of customers dropped compared to the total participants requested to provide verification in that month.								
23	Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.								
24									
25	CARE Table 3B Post-Enrollment Verification Results (Electric only High Usage)								
26	SDG&E								
27	July 2020								
28	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
29	January	300,720	242	0.1%	42	14	56	23.1%	0.0%
30	February	303,406	147	0.0%	2	1	3	2.0%	0.0%
31	March	309,258	47	0.0%	0	0	0	0.0%	0.0%
32	April	315,404	14	0.0%	0	0	0	0.0%	0.0%
33	May	322,105	2	0.0%	1	0	1	50.0%	0.0%
34	June	325,923	0	0.0%	0	0	0	0.0%	0.0%
35	July	326,137	242	0.1%	0	0	0	0.0%	0.0%
36	August						0	0.0%	0.0%
37	September						0	0.0%	0.0%
38	October						0	0.0%	0.0%
39	November						0	0.0%	0.0%
40	December						0	0.0%	0.0%
41	YTD Total	326,137	694	0.2%	45	15	60	8.6%	0.0%
42									
43	¹ Includes all participants who were selected for high usage verification process.								
44	² Includes customers verified as over income, who requested to be de-enrolled, did not reduce usage, or did not agree to be weatherized.								
45	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.								
46	⁴ Percentage of customers dropped compared to the total participants requested to provide verification in that month.								
47									
48	Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.								
49									
50									

	A	B	C	D	E	F	G							
1	CARE Table 4 - CARE Self-Certification and Self-Recertification Applications¹													
2								SDG&E						
3								July 2020						
4		Provided	Received	Approved	Denied	Pending/Never Completed	Duplicates							
5	Total (Y-T-D)	3,854	98,133	51,523	14,380	59	32,171							
6	Percentage		100%	51%	15%	0%	34%							
7	¹ Includes sub-metered. Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.													
8														
9														
10														

	A	B	C	D	E	F	G	H	I	J	K
1	CARE Table 5 - Enrollment by County										
2	SDG&E										
3	July 2020										
4	County	Estimated Eligible Households[1]			Total Households Enrolled[2]			Penetration Rate			
5		Urban	Rural	Total	Urban	Rural[3]	Total	Urban	Rural	Total	
6	Orange	14,908	0	14,908	14,223	0	14,223	95%	NA	95%	
7	San Diego	281,284	6,053	287,337	304,897	7,017	311,914	108%	116%	109%	
8	Total	296,192	6,053	302,245	319,120	7,017	326,137	108%	116%	108%	
9											
10	1 As reflected in filing A.14-11-007, et al., Annual CARE Eligibility Estimates filed February 12, 2020.										
11	2 Total Households Enrolled includes submeter tenants.										
12	3 No Rural eligible population exists in Orange County in SDG&E territory, therefore penetration for Orange County Rural is not applicable.										
13	Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.										
14											
15											

	A	B	C	D	E	F	G	H	I
1	CARE Table 6 - Recertification Results								
2	SDG&E								
3	July 2020								
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	300,720	3,054	1.0%	2,075	169	67.9%	0.1%	
6	February	303,406	1,557	0.5%	1,122	36	72.1%	0.0%	
7	March	309,258	423	0.1%	299	3	70.7%	0.0%	
8	April	315,404	14	0.0%	0	0	0.0%	0.0%	
9	May	322,105	2	0.0%	0	0	0.0%	0.0%	
10	June	325,923	5	0.0%	0	0	0.0%	0.0%	
11	July	326,137	243	0.1%	0	0	0.0%	0.0%	
12	August								
13	September								
14	October								
15	November								
16	December								
17	YTD	326,137	5,298	1.6%	3,496	208	66.0%	0.1%	
18									
19									
20	1 As reflected in filing A.14-11-007, et al., Annual CARE Eligibility Estimates filed February 12, 2020.								
21	2 Data represents total residential electric customers.								
22	3 Includes customers who did not respond or who requested to be de-enrolled.								
23	4 Percentage of customers recertified compared to the total participants requested to recertify in that month.								
24	Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.								
25									

	A	B	C	D	E	F	G
1	CARE Table 7 - Capitation Contractors¹						
2	SDG&E						
3	July 2020						
4	Contractor	Contractor Type				Total Enrollments	
5		(Check one or more if applicable)				Current	Year-to-Date
6		Private	CBO	WMDVBE	LIHEAP	Month	
7	211 SAN DIEGO		X			87	1006
8	211 ORANGE COUNTY		X			-	-
9	ALLIANCE FOR AFRICAN ASSISTANCE		X			-	1
10	AMERICAN RED CROSS WIC OFFICES		X	X		-	3
11	CATHOLIC CHARITIES		X			-	-
12	CHULA VISTA COMMUNITY COLLABORATIVE		X			-	5
13	COMMUNITY RESOURCE CENTER		X			-	6
14	HEARTS AND HANDS WORKING TOGETHER		X			-	-
15	HOME START		X			-	-
16	HORN OF AFRICA		X			-	-
17	INTERFAITH COMMUNITY SERVICES		X			-	-
18	LA MAESTRA FAMILY CLINIC		X		X	-	0
19	MAAC PROJECT		X			-	14
20	NEIGHBORHOOD HEALTH CARE	X				-	2
21	NORTH COUNTY HEALTH SERVICES		X			1	4
22	SAN DIEGO STATE UNIVERSITY WIC OFFICES		X			1	5
23	SAN YSIDRO HEALTH CENTERS		X			-	7
24	SCRIPPS HEALTH WIC		X			-	1
25	UNION OF PAN ASIAN COMMUNITIES SAN DIEGO(UPAC)		X			-	-
26	VISTA COMMUNITY CLINIC		X			-	1
27	Total Enrollments					89	1,055
28	¹ All capitation contractors with current contracts are listed regardless of whether they have signed up customers or submitted invoices this year. Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.						
29							
30							
31							
32							
33							

	A	B	C	D	E	F	G	H	I
1	CARE Table 8 - Households as of Month-End								
2	SDG&E								
3	July 2020								
4	Month	Gas and Electric	Gas Only	Electric Only	Total	Eligible Households ¹	Penetration	% Change	Total Residential Accounts ²
5	January	189,088	0	113,250	302,338	302,245	100%	0.2%	1,344,528
6	February	189,763	0	113,643	303,406	302,245	100%	0.2%	1,346,443
7	March	193,756	0	115,502	309,258	302,245	102%	0.2%	1,348,198
8	April	197,747	0	117,657	315,404	302,245	104%	0.2%	1,349,467
9	May	202,220	0	119,885	322,105	302,245	107%	0.2%	1,350,937
10	June	204,607	0	121,316	325,923	302,245	108%	0.2%	1,352,850
11	July	205,003	0	121,134	326,137	302,245	108%	0.2%	1,354,148
12	August								
13	September								
14	October								
15	November								
16	December								
17	YTD	205,003	N/A	121,134	326,137	302,245	108%	0.2%	1,354,148
18									
19	1 As reflected in filing A.14-11-007, et al., Annual CARE Eligibility Estimates filed February 12, 2020.								
20	2 Data represents total residential electric customers.								
21									
22	Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.								
23									
24									

	A	B	C	D	E	F	G
1	CARE Program Table 9 - Expenditures for Pilots/CHANGES Program¹						
2	SDG&E						
3	July 2020						
4	2020	Authorized 2020 Budget	Current Month Expenses	Expenses Since Jan. 1, 2020	% of 2020 Budget Expended		
5		Total	Total	Total	Total		
6							
7							
8	CHANGES Program	\$ 267,733	\$ 18,672	\$ 150,982	56%		
9							
10							
11	Total	\$ 267,733	\$ 18,672	\$ 150,982	56%		
12							
13	1. Decision 15-12-047 transitioned CHANGES pilot to CHANGES program and funding for the effort is captured herein.						
14							
15	NOTE: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.						
16							

CARE Table 10 CHANGES One-On-One Customer Assistance Sessions San Diego Gas & Electric	
Reporting Period June 2020^[1]	
No. of attendees at education sessions	37
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
Enroll in Energy Assistance Programs	0
High Energy CARE User	0
Medical Baseline Application	0
Payment Extension	0
Payment Plan	0
Request Bill Adjustment	2
Request Customer Service Visit	0
Request Meter Service or Testing	0
Schedule Energy Audit	0
Solar	0
Stop Disconnection	0
Time of Use	0
Wildfire Related Issue	0
Total disputes [3]	2
Needs Assistance	
Add/Remove Level Pay Plan	0
CARE Enrollment	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 Submission	0
Assisted with Reconnection	0
Billing Language Changed	0
Consumer Education Only	0
Electricity Aggregation	0
Energy Alerts	0
Enrolled in Demand Response Programs	0
ESAP	0
HEAP/LiHEAP	0
Medical Baseline	0
Neighbor to Neighbor	43
REACH	0
Reported Safety Problem	0
Reported Scam	0
Set Up 3rd Party Notification	0
Set Up New Account	0
Payment Extension	3
Payment Plan	2
Wildfire Related Issue	0
Total Needs Assistance [2]	48

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: Arabic, Dari, English, French, Spanish

[1] There is a one-month lag behind the current reporting month. The data for July 2020 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 2020 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

2020 [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		Avoiding Disconnection	0	N/A	0	CHANGES Ed Handout
N/A		CARE/FERA and Other Assistance Programs	0	N/A	0	CHANGES Ed Handout
N/A		Electric and Natural Gas Safety	0	N/A	0	CHANGES Ed Handout
N/A		Energy Conservation	0	N/A	0	CHANGES Ed Handout
N/A		Gas Aggregation	0	N/A	0	CHANGES Ed Handout
N/A		High Energy Use	0	N/A	0	CHANGES Ed Handout
N/A		Level Pay Plan	0	N/A	0	CHANGES Ed Handout
N/A		Understanding Your Bill	0	N/A	0	CHANGES Ed Handout
Month Total			0		0	
Year-to-Date			360		1722	

[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 June 1st, 2020, CHANGES one-on-one data reports have moved from monthly to quarterly for the 2020-2021 program contract year. The data for Q1 June-August 2020 will be reported once received.

[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.