BEFORE THE PUBLIC UTILITIES COMMISSION
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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.	Application 14-11-007 (Filed November 18, 2014)
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MONTHLY REPORT OF SAN DIEGO GAS & ELECTRIC COMPANY (U 902 M) ON LOW-INCOME ASSISTANCE PROGRAMS FOR MARCH 2020

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April 21, 2020

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

This is the third monthly report for program year (PY) 2020. 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 information to assist in analyzing the low-income programs.

This report presents year-to-date ESA Program and CARE Program results and expenditures through March 31, 2020 for San Diego Gas & Electric Company (SDG&E).

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

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San Diego Gas & Electric Company

Energy Savings Assistance (ESA) Program

And

California Alternate Rates for Energy (CARE)

Program

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ENERGY SAVINGS ASSISTANCE PROGRAM MONTHLY REPORT

1. ESA PROGRAM EXECUTIVE SUMMARY

1.1 ESA Program Overview

COVID-19 Program Impacts

On March 4, 2020, California Governor Gavin Newsom declared a State of Emergency to help the state prepare for the broader spread of the COVID-19 virus. On March 13, SDG&E contacted ESA Program contractors with information regarding COVID-19 concerns relative to their provision of ESA services, provided general field safety guidance, and requested information be reported on any issues or concerns experienced in the field. On March 19, the Governor issued a "Stay at Home" order for non-essential workers. In response, and in consultation with Energy Division, on March 20, SDG&E notified ESA contractors to cease all non-essential customer contacts, but excluding customer contacts that are critical to customer health and/or safety, until further notice. Similarly, SDG&E has also ceased all non-essential outreach and enrollment activities until further notice.

On March 23, SDG&E received a letter from the Executive Director of the Commission requesting that the Investor-Owned Utilities (IOUs) to offer ESA contractors 30-day advance payments in an effort to retain the ESA Program workforce and quickly ramp up the ESA Program once the suspension is lifted ("March 23 Letter"). The March 23 Letter also requested that the IOUs "maximize" virtual marketing, education and outreach activities. Pursuant to the

March 23 Letter, SDG&E provided its 10 ESA contractors with 30-day advance payment offers on March 25. Of the offers sent, three ESA Program contractors accepted, three contractors declined, and four submitted alternate proposals for Commission consideration. One of the accepting contractors provided an alternate proposal for repayment terms.

SDG&E continues to work with its ESA contractors to identify and implement solutions for virtual marketing, education, and outreach activities with the goal of providing energy education to help customers save energy while building a pipeline of enrollments that can be treated once face-to-face activities can resume.

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

ESA Program Summary through March 2020			
	2020 Authorized / Planning Assumptions	**Actual to Date[1]**	**%**
Budget[2]	$35,509,153	5,411,125	15%
Homes Treated[3]	23,761	1,469	6%
kWh Saved	7,220,000	330,207	5%
kW Demand Reduced	3,954	47	1%
Therms Saved	420,000	5,753	1%
GHG Emissions Reduced (Tons)	6,428	215	3%

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 March. 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.
[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.

Footnote continued on next page

ESA Program Contractor Outreach

SDG&E's Outreach and Assessment (O&A) contractors canvas targeted neighborhoods to enroll customers in the ESA Program. Prior to stopping work in March, door-to-door canvassing from SDG&E's largest O&A contractor resulted in 789 ESA Program leads and 609 enrollments.[4] Overall, ESA Program marketing, education, and outreach efforts were successful in creating 5,768 leads and 922 enrollments for the month of March.

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 March, SDG&E received a list of seven potential leads through this leveraging 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. SDG&E did not submit any leads to GRID during March.

ESA Program Multifamily Common Area Measure (MF CAM) Initiative

In March 2020, SDG&E's ESA Program MF CAM implementer continued targeted marketing to potential ESA MF CAM properties, including re-

[4] Enrollments are inclusive of all homes enrolled during March 2020. Enrollments not invoiced during the reporting month will not be represented in monthly reporting tables.

syndication projects in SDG&E's service territory. Eleven properties have been completed and invoiced to date and thirteen other properties are currently receiving measure installations. In addition, there are a total of four properties pending energy assessments/audits. There have been minimal COVID-19 related impacts to the ongoing operations of the ESA CAM initiative as work can be completed via phone or email and ongoing CAM installations can be completed without contact with other people.

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 implementer.

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 March, two customers were served by the Language Line.

Language	**Calls**
Arabic	1
Mandarin	1
TOTAL	2

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 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, newspaper, digital (including paid search), email, direct mail and bill inserts, as well as a robust outreach program. The majority of the campaign was slated to begin on March 1, however, due to the state of emergency in California declared by Governor Newsom on March 4, 2020, and the national emergency declared by President Trump on March 13, 2020, and Governor Newsom's order on March 19, 2020 requiring Californians to stay home as a result of the COVID-19 pandemic, as well as other guidance from local, state, and federal health and emergency response agencies, 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. Included at Appendix B to this monthly report, is an overview of how ME&O efforts for customer assistance have been shifted to respond to the pandemic emergency and push awareness and enrollment for available assistance that SDG&E provides.

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 March 2020 are summarized in the following sections:

Print Advertising:

SDG&E planned English print 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 March, the messaging in SDG&E's ads has been updated to focus on those who are recently unemployed or in need due to the COVID-19 crisis. The ads now have an overall Customer Assistance message rather than focusing specifically on CARE or ESA with information on where to get help. The new copy will continue to run until the Stay at Home order has been lifted.

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 61,064 impressions in March with a click-through-rate (CTR) of 32%. Paid Social began running in March and had 185,209 impressions with a CTR of 4%. Banner Display Ads began running in March and had 1,371,448 impressions with a CTR of 0.16%. Due to the COVID-19 crisis, ESA online advertising has been

put on hold in lieu of the general assistance campaign that is focused on enrolling customers in CARE or FERA. 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 67 CARE and ESA Program messages to an audience of more than 169,000 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 March 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.[5] The campaign provides SDG&E with a way to directly connect with customers in the 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 March 2020 generated the following numbers:

The Harris Group	
ESA Leads	0
CARE Enrollments	2,706
CARE Recertifications	496

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

Email:

SDG&E did not send out ESA Program promotional emails to potential ESA-eligible customers in March 2020 due to issues surrounding COVID-19.

Direct Mail

SDG&E did not send out ESA Program promotional postcards to potential eligible customers in March 2020 due to issues surrounding COVID-19.

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 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 March 2020, SDG&E's partner outreach activities resulted in the following activities:

Energy Solutions Partner Network	
ESA Leads	30
CARE Enrollments	25
CARE Recertifications	40

Partner Spotlight:

In March 2020, the SDG&E Customer Solutions Outreach Team participated in 21 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. This month's events and presentations were halted early in the month due to the COVID-19 situation.

On March 11, SDG&E provided a Spanish, residential presentation to the parents and staff at Sherman Elementary through the Neighborhood House Association (NHA). The NHA strives to enrich lives through a continuum of education and wellness services. Sherman Elementary is 92% Hispanic and 87% designated low-income school. During this presentation, attendees received information regarding the ESA Program, Medical Baseline, CARE and Time-Of-Use along with other resources, programs and initiatives.

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 March 2020, SDG&E completed 10 outreach events. In mid-March, SDG&E made the decision to halt participation in any in-person community events because of the COVID-19 pandemic. A summary of activities and presentations held in March is listed below:

Date	Event Title	Partner / Hosting Organization	Location
3/3/2020	Community Expos	Lincoln Military Housing	Santo Community Center 10300 Yorktown St. San Diego, CA 92124
3/4/2020	Farm to Family Fair	SDEats	4343 Ocean View Blvd. San Diego, CA 92913
3/5/2020	Community Health Fair	La Maestra CHC	City Heights Clinic 4060 Fairmount Ave. San Diego, CA 92105
3/5/2020	Community Expos	Lincoln Military Housing	Admiral Hartman Park Oliver & Foutz Ave. San Diego, CA 92109
3/6/2020	Community Expos	Lincoln Military Housing	Village of Serra Mesa 8420 Krenz St. San Diego, CA 92123

3/6/2020	Health Fair	eStudySite	Pentecostal Church 395 D St. Chula Vista, CA 91911
3/8/2020	Mariachi Festival	National City Chamber	Bayside Park 999 Bayside Parkway Chula Vista, CA 91910
3/10/2020	Hallway Informational Table	City of San Marcos	San Marcos Senior Activity Center 111 Richmar Avenue San Marcos, CA 92069
3/11/2020	Food Distribution	Feeding San Diego	Julian Library 1850 Highway 78 Julian, CA 92036 Shelter Valley Community Center 7217 Great Southern Overland Stage Rte. Julian, CA 92036
3/11/2020	Community Expos	Lincoln Military Housing	Bayview Hills 2020 Munda Rd. San Diego, CA 92139

Other Customer Engagement Efforts

Subject to emergency declarations mentioned 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 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 emergency 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 20th, SDG&E closed the branch offices to the public over concern of the COVID-19 virus. 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 (ESSs) to enroll customers directly into the CARE Program over the telephone. In March 2020, SDG&E's CCC generated the following applications and leads:

	CCC	**Branch Office**
ESA Leads	3	28
CARE Enrollments	20	295
CARE Recertifications	3	24

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 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. SDG&E contracts with two local agencies offering outreach and assessment services to provide greater leveraging opportunities and provide customers with the benefits of both programs. In March, LIHEAP organizations enrolled 35 customers in the ESA Program.

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. No new activity was reported toward this activity in March.

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 March 2020. SDG&E's in-person WE&T classes were halted in early March due to the COVID-19 emergency and the majority of classes have been transitioned online.

1.5 Miscellaneous

1.5.1 ESA Program Studies

In March, the IOUs continued discussions with Energy Division on research topics for the 2022 LINA study. A proposed work scope will be presented at an LIOB Subcommittee meeting in April.

The IOUs selected Apprise Inc. to conduct an assessment of the 2019 Non-Energy Benefits (NEB) Verification study, which will commence in April after execution of a contract.

1.5.2 ESA Program Pilot

The Programmable Communicating Thermostat (PCT or smart thermostat) Time-of-Use (TOU) Pilot, ordered in D.17-12-009 and approved in Advice Letter 3197-E/2655-G (AL) was completed in March. On March 17, Evergreen Economics presented the draft results of the PCT pilot to the Commission's Energy Division for review and discussion, providing opportunity for updates to the report based on the discussion. On March 31 the Final Evaluation Report, authored by Evergreen Economics, was submitted jointly by SCE, SDG&E, and PG&E. It is important to note that the statewide sample size for this pilot was small and is not likely to yield statistically significant results.

The report concludes that statewide participants were generally satisfied with their thermostats but that the smart thermostat alone is likely not a valuable program tool for reducing peak usage, though it can help improve customer awareness. For SDG&E, the report also concludes that customers used the thermostat to save more energy in the winter than in the summer months, however, they did cut back in both seasons. It also concludes that both the

treatment and control group for SDG&E showed a sudden drop in energy usage at 4:00 p.m. and was maintained during the peak period. This could be due to SDG&E's early adoption of TOU rates and education related to those efforts. The full report can be found at:

https://pda.energydataweb.com/#!/documents/2359/view.

2. CARE EXECUTIVE SUMMARY

2.1 CARE Program Summary

COVID-19 Program Impacts

On March 19, SDG&E filed Advice Letter 3516-E/2854-G to implement applicable customer protections identified in D.19-07-015. For the CARE Program, these include freezing all CARE eligibility reviews, including recertifications, Post Enrollment Verification (PEV) and High Energy Usage (HEU) verifications; the freeze included the removal of customers with pending requests and went into effect retroactively on March 4. Additional information on how SDG&E has increased marketing and outreach for CARE, including compliance with Energy Division requests on messaging on the SDG&E website has been included at Appendix B to this report.

2.1.1 Please provide CARE Program summary costs.

CARE Budget Categories	Authorized Budget[6]	Actual Expenses to Date	% of Budget Spent
Outreach	$3,254,171	$558,663	17%
Proc., Certification and Verification	$517,211	$167,862	32%
Post Enrollment Verification	$363,667	$38,210	11%
Information Tech./Programming	$1,719,900	$134,814	8%
Pilots-CHANGES	$267,733	$70,280	26%
Regulatory Compliance	$303,653	$84,634	28%
General Administration	$836,246	$146,983	18%
CPUC Energy Division Staff	$57,852	$27,412	47%
Cooling Centers	$43,935	$0	0%
Total Expenses	**$7,364,368**	**$1,228,860**	**17%**
Subsidies and Benefits	$74,571,504	$31,460,100	42%
Total Program Costs and Discounts	**$81,935,872**	**$32,688,960**	**40%**

2.1.2 Provide the CARE Program penetration rate to date.

CARE Penetration		
Participants Enrolled	Eligible Participants[7]	Penetration rate
307,185	302,245	102%

[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 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 March 2020, marketing and outreach efforts generated 10,060 completed CARE applications, and 3,522 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. Appendix B to this monthly report illustrates how SDG&E has increased CARE marketing, outreach and community engagement in response to the COVID-19 emergency.

Direct Marketing

Direct Mail

In March 2020, SDG&E continued its rate comparison campaign by mailing a comparison letter to 16,296 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. The letter contributed to 3,522 CARE automated phone enrollments and online enrollments.

Email

In March 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 March 2020, SDG&E sent out 150,294 emails (many of these reminders) which generated a 30% open rate and a 5% click through rate over the course of the month. Updated email information as it relates to shifting tactics related to the COVID-19 emergency will be provided in subsequent monthly reports.

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 Women's Infant & Children Organization (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 LEP audiences and provide multilingual staffing. During the month of March, the following numbers were generated by the Capitation Agencies:

Capitation Agencies	
ESA Leads	1
CARE Enrollments	27
CARE Recertifications	88

Cool Zones

The Cool Zones are active between May and October each year, there were no cool zone activities in March.

Women's Infant & Children Organizations

In the first part of March, SDG&E buttons were worn by the employees of WIC offices with CARE messaging to promote the program to those that visited offices. Towards the middle of the month, these offices were closed to in-person interactions because of COVID-19. WIC continues to field questions to 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

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

HHSA	March	YTD
ESA Leads	0	0
CARE Enrollments	65	205
CARE Recertifications	77	215

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 March 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 and Table 11 information for the month of February 2020. March 2020 activity for Table 10 and Table 11 will be reported in a subsequent report.[8]

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

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

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

5. APPENDIX B – ASSISTANCE PRESENTATION

Appendix A
ESA and CARE Program Tables

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

	Authorized Budget [1] [2]			Current Month Expenses [3]			Year to Date Expenses			% of Budget Spent YTD		
ESA Program:	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**
Energy Efficiency												
Appliances [4]	$ 854,260	$ 319,825	$ 1,174,085	$ 86,113	$ -	$ 86,113	$ (75,401)	$ 245,365	$ 169,963	-9%	77%	14%
Domestic Hot Water	$ 65,958	$ 2,132,630	$ 2,198,588	$ 3,352	$ 108,396	$ 111,749	$ 7,099	$ 229,532	$ 236,631	11%	11%	11%
Enclosure	$ 2,560,350	$ 3,393,952	$ 5,954,302	$ 104,662	$ 138,738	$ 243,400	$ 187,210	$ 248,162	$ 435,371	7%	7%	7%
HVAC	$ 427,358	$ 3,727,353	$ 4,154,711	$ 98,147	$ 228,774	$ 326,920	$ 142,499	$ 536,184	$ 678,683	33%	14%	16%
Maintenance	$ 7,063	$ 291,617	$ 298,680	$ -	$ 36,546	$ 36,546	$ -	$ 47,872	$ 47,872	0%	16%	16%
Lighting	$ 4,642,829	$ -	$ 4,642,829	$ 446,926	$ -	$ 446,926	$ 918,988	$ -	$ 918,988	20%	0%	20%
Miscellaneous	$ 1,775,159	$ -	$ 1,775,159	$ 95,174	$ -	$ 95,174	$ 210,781	$ -	$ 210,781	12%	0%	12%
Customer Enrollment	$ 2,195,740	$ 2,195,740	$ 4,391,481	$ 255,068	$ 255,068	$ 510,137	$ 682,691	$ 682,691	$ 1,365,382	31%	31%	31%
In Home Education	$ 348,433	$ 348,433	$ 696,865	$ 46,546	$ 46,546	$ 93,093	$ 120,965	$ 120,965	$ 241,929	35%	35%	35%
Pilot	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
Energy Efficiency TOTAL	**$ 12,877,149**	**$ 12,409,550**	**$ 25,286,700**	**$ 1,135,989**	**$ 814,069**	**$ 1,950,058**	**$ 2,194,831**	**$ 2,110,771**	**$ 4,305,602**	17%	17%	17%
Training Center	$ 249,089	$ 249,089	$ 498,179	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
Inspections	$ 90,210	$ 90,210	$ 180,420	$ 8,776	$ 8,776	$ 17,551	$ 21,526	$ 21,526	$ 43,053	24%	24%	24%
Marketing and Outreach	$ 600,000	$ 600,000	$ 1,200,000	$ 87,527	$ 87,527	$ 175,054	$ 139,735	$ 139,735	$ 279,470	23%	23%	23%
Statewide Marketing Education and Outreach	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
Studies	$ 17,083	$ 17,083	$ 34,166	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
Regulatory Compliance	$ 168,266	$ 168,266	$ 336,532	$ 14,120	$ 14,120	$ 28,240	$ 44,770	$ 44,770	$ 89,540	27%	27%	27%
General Administration	$ 1,368,601	$ 1,368,601	$ 2,737,202	$ 71,285	$ 71,285	$ 142,570	$ 209,217	$ 209,216	$ 418,433	15%	15%	15%
CPUC Energy Division	$ 23,877	$ 23,877	$ 47,754	$ 2,274	$ 2,274	$ 4,547	$ 5,874	$ 5,874	$ 11,748	25%	25%	25%
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**	**$ 1,319,970**	**$ 998,050**	**$ 2,318,020**	**$ 2,615,953**	**$ 2,531,892**	**$ 5,147,845**	**17%**	**17%**	**17%**
Funded Outside of ESA Program Budget												
Indirect Costs				$ 49,416	$ 47,625	$ 97,041	$ 119,855	$ 119,376	$ 239,231			
NGAT Costs		$ 288,000	$ 288,000		$ 31,642	$ 31,642		$ 47,752	$ 47,752		17%	17%

[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] Current Month Expenses for Energy Efficiency Total includes March accruals and/or re-accruals of $1,441,874 in the following reporting categories: Appliances $13,487; Domestic Hot Water $71,228; Enclosure $27,775; HVAC $228,409; Maintenance $48,094; Lighting $283,102; Miscellaneous $75,534; Customer Enrollment $589,544; In Home Energy Education $104,701.
[4] Negative amount due to the correction of 2019 expense incorrectly charged to electric and reclassified to gas.

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
March 2020

	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	$ 1,767,500	$ 1,767,500	$ 3,535,000	$ 99,017	$ 99,017	$ 198,035	$ 133,140	$ 133,140	$ 266,279	8%	8%	8%
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]	$ 30,625	$ 30,625	$ 61,250	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
Regulatory Compliance												
General Administration												
TOTAL PROGRAM BUDGET/EXPENSES	**$ 2,250,253**	**$ 2,250,253**	**$ 4,500,505**	**$ 99,017**	**$ 99,017**	**$ 198,035**	**$ 131,640**	**$ 131,640**	**$ 263,279**	**6%**	**6%**	**6%**
			$ 35,509,153									

[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 amount is the result of expense related to thermostats reclassified to Marketing and Outreach (Table 1).
[6] 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 2

SDG&E

March 2020

	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	28	-	-	538	26,625	1.6%	Each	2	-	-	37	1,951	0.3%	Each	26	-	-	501	24,674	2.1%	0 Each						
Refrigerator	Each	129	74,208	9	-	119,306	7.1%	Each	29	17,444	2	-	27,939	3.8%	Each	100	56,764	7	-	$ 91,368	7.8%	0 Each						
Microwave	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	-	0.0%	0 Each						
Domestic Hot Water																												
Other Domestic Hot Water[3]	Home	1,191	5,647	1	3,402	118,990	7.1%	Home	413	1,777	0	1,131	$ 34,289	4.7%	Home	778	3,870	1	2,271	$ 84,701	7.2%	0 Home						
Water Heater Tank and Pipe Insulation	Home	111	-	-	112	6,719	0.4%	Home	56	-	-	44	$ 3,523	0.5%	Home	55	-	-	68	$ 3,196	0.3%	0 Home						
Water Heater Repair/Replacement	Home	141	-	-	4,615	77,710	4.7%	Home	64	-	-	2,038	$ 27,194	3.7%	Home	77	-	-	2,577	$ 50,516	4.3%	0 Home						
Combined Showerhead/TSV	Home	-	-	-	-	-	0.0%	Home	-	-	-	-	$ -	0.0%	Home	-	-	-	-	$ -	0.0%	0 Home						
New - Heat Pump Water Heater	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	0 Each						
New - Tub Diverter/ Tub Spout	Each	14	65	0	26	1,474	0.1%	Each	11	65	0	20	$ 1,159	0.2%	Each	3	-	-	6	$ 316	0.0%	0 Each						
New - Thermostat-controlled Shower Valve	Each	-	-	-	-	-	0.0%	Each	0	0	0	0	0	0.0%	Each	0	0	0	0	0	0.0%	0 Each						
Enclosure																												
Air Sealing	Home	1,203	6,448	1	391	388,275	23.2%	Home	371	1,664	0	106	$ 121,114	16.6%	Home	832	4,784	1	285	$ 267,161	22.7%	0 Home						
Caulking	Home	-	-	-	-	-	0.0%	Home	-	-	-	-	-	0.0%	Home	-	-	-	-	-	0.0%	0 Home						
Attic Insulation	Home	13	-	-	455	20,344	1.2%	Home	5	-	-	175	$ 7,856	1.1%	Home	8	-	-	280	$ 12,488	1.1%	0 Home						
HVAC																												
FAU Standing Pilot Conversion	Each	1	-	-	10	341	0.0%	Each	1	-	-	10	$ 341	0.0%	Each	-	-	-	-	$ -	0.0%	0 Each						
Furnace Repair/Replacement	Each	212	-	-	(3,110)	338,277	20.2%	Each	61	-	-	(780)	$ 90,190	12.4%	Each	151	-	-	(2,330)	$ 248,087	21.1%	0 Each						
Room A/C Replacement	Each	26	(186)	(0)	-	26,429	1.6%	Each	2	-	-	-	$ 2,409	0.3%	Each	24	(186)	(0)	-	$ 24,020	2.0%	0 Each						
Central A/C replacement	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	0 Each						
Heat Pump Replacement	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	0 Each						
Evaporative Cooler (Replacement)	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	0 Each						
Evaporative Cooler (Installation)	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	0 Each						
Duct Test and Seal	Home	29	-	-	108	6,428	0.4%	Home	19	-	-	66	4,547	0.6%	Home	10	-	-	42	1,880	0.2%	0 Home						
New - Energy Efficient Fan Control	Home	-	-	-	-	-	0.0%	Home	-	-	-	-	$ -	0.0%	Home	-	-	-	-	$ -	0.0%	0 Home						
New - Prescriptive Duct Sealing	Home	-	-	-	-	-	0.0%	Home	-	-	-	-	$ -	0.0%	Home	-	-	-	-	$ -	0.0%	0 Home						
New - High Efficiency Forced Air Unit (HE FAU)	Home	-	-	-	-	-	0.0%	Home	-	-	-	-	$ -	0.0%	Home	-	-	-	-	$ -	0.0%	0 Home						
New - A/C Time Delay	Home	-	-	-	-	-	0.0%	Home	-	-	-	-	$ -	0.0%	Home	-	-	-	-	$ -	0.0%	0 Home						
New - Smart Thermostat	Home	29	3,457	1	-	5,210	0.3%	Home	16	1,427	0	-	2,840	0.4%	Home	13	2,030	0	-	2,370	0.2%	0 Home						
Maintenance																												
Furnace Clean and Tune	Home	131	-	-	(204)	9,996	0.6%	Home	44	-	-	(75)	$ 3,401	0.5%	Home	87	-	-	(129)	$ 6,595	0.6%	0 Home						
Central A/C Tune up	Home	-	-	-	-	-	0.0%	Home	-	-	-	-	$ -	0.0%	Home	-	-	-	-	$ -	0.0%	0 Home						
Lighting																												
Interior Hard wired LED fixtures	Each	1,516	6,413	1	(116)	127,283	7.6%	Each	359	1,519	0	(27)	$ 30,142	4.1%	Each	1,157	4,894	1	(89)	$ 97,142	8.3%	0 Each						
Exterior Hard wired LED fixtures	Each	396	2,035	0	-	28,514	1.7%	Each	102	524	0	-	$ 7,331	1.0%	Each	294	1,511	0	-	$ 21,183	1.8%	0 Each						
LED Torchiere	Each	1,231	5,207	1	(95)	113,359	6.8%	Each	386	1,633	0	(30)	$ 35,395	4.9%	Each	845	3,574	0	(65)	$ 77,964	6.6%	0 Each						
Occupancy Sensor	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	0 Each						
LED Night Light	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	-	0.0%	0 Each						
New - LED R/BR Lamps	Each	861	2,600	0	(42)	13,922	0.8%	Each	364	1,099	0	(16)	$ 5,886	0.8%	Each	497	1,501	0	(26)	$ 8,036	0.7%	0 Each						
New - LED A-Lamps	Each	11,440	24,253	3	(336)	168,168	10.1%	Each	7,394	15,675	2	(187)	$ 108,692	14.9%	Each	4,046	8,578	1	(149)	$ 59,476	5.1%	0 Each						
Miscellaneous																												
Pool Pumps	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	0 Each						
Smart Strip	Each	870	121,800	15	-	34,574	2.1%	Each	697	97,580	12	-	$ 27,699	3.8%	Each	173	24,220	3	-	$ 6,875	0.6%	0 Each						
Smart Strip Tier II	Each	559	78,260	16	-	38,924	2.3%	Each	346	48,440	10	-	$ 24,581	3.4%	Each	213	29,820	6	-	$ 14,343	1.2%	0 Each						
Pilots																												
		-					0.0%														0.0%							
Customer Enrollment																												
ESA Outreach & Assessment	Home	1,469					0.0%	Home	1,000				$ 134,233	18.4%	Home	469				$ 59,514	5.1%	0 Home						
ESA In-Home Energy Education	Home	1,469					0.0%	Home	1,000				$ 26,338	3.6%	Home	469				$ 12,982	1.1%	0 Home						
Total Savings/Expenditures			330,207	47	5,753	$ 1,670,870				188,847	28	2,511	$ 729,049				141,360	20	3,242	$ 1,174,889				-	-	-	$ -	
Total Households Weatherized [2]		1,208							372							836							-				
Households Treated	Total (K+S)							First Touches							**Re-treated Homes/Go-Backs**							**Aliso Canyon**						
- Single Family Households Treated	Home	429						Home	296						Home	133						Home						
- Multi-family Households Treated	Home	642						Home	486						Home	156						Home						
- Mobile Homes Treated	Home	398						Home	218						Home	180						Home						
Total Number of Households Treated	Home	1,469						Home	1,000						Home	469						Home						
# Eligible Households to be Treated for PY [3]	Home	23,761						Home	243						Home	23,518						Home						
% of Households Treated	%	6%						%	412%						%	2%						%						
- Master-Meter Households Treated	Home	291						Home	149						Home	142						Home						

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

[1] Envelope and Air Sealing Measures may include outlet cover plate gaskets, attic access weatherization, weatherstripping - door, caulking and

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

[3] Other Domestic Hot Water consists of faucet aerators, low flow showerheads, and TSVs

Energy Savings Assistance Program Table 2A
SDG&E
March 2020

		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						
Exterior Hard wired LED fixtures	Each						
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
March 2020

	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							
Pipe Insulation	Each	3	-	-	26	$ 2,378	0.9%
Faucet Aerator	Each	4	91	0	4	$ 30	0.0%
Envelope							
HVAC							
Furnace Replacement	Each	48	-	-	15	$ 1,348	0.5%
HEAT Pump Split System	Each	5	77	0	(0)	$ 8,337	3.2%
AC Tune-up	Each	3	43	0	0	$ 356	0.1%
Lighting							

Energy Savings Assistance CAM Program Table 2B-1, Eligible Common Area Measures List
SDG&E
March 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	May-18		6, 7, 8, 10, 14, 15
Faucet Aerator	May-18		6, 7, 8, 10, 14, 15
Envelope			
HVAC			
Furnace Replacement	May-18		6, 7, 8, 10, 14, 15
HEAT Pump Split System	May-18		6, 7, 8, 10, 14, 15
Lighting			
Exterior LED Lighting	May-18		6, 7, 8, 10, 14, 15
Interior LED Lighting	May-18		6, 7, 8, 10, 14, 15
Interior TLED Type A Lamps	May-18		6, 7, 8, 10, 14, 15
Interior TLED Type C Lamps	May-18		6, 7, 8, 10, 14, 15
Interior LED Exit Sign	May-18		6, 7, 8, 10, 14, 15
Interior LED Fixture	May-18		6, 7, 8, 10, 14, 15
Interior LED Screw-in	May-18		6, 7, 8, 10, 14, 15
Miscellaneous			
Tier-2 Smart Power Strip	May-18		6, 7, 8, 10, 14, 15
Variable Speed Pool Pump	May-18		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-C - Energy Savings and Average Bill Savings per Treated Home/Common Area**	
2	**SDG&E**	
3	**March 2020**	
4		
5	**Table 3A-1, ESA Program**	
6	Annual kWh Savings	330,207
7	Annual Therm Savings	5,753
8	Lifecycle kWh Savings	2,793,245
9	Lifecycle Therm Savings	30,518
10	Current kWh Rate	$ 0.26
11	Current Therm Rate	$ 1.20
12	Average 1st Year Bill Savings / Treated households	$ 63.14
13	Average Lifecycle Bill Savings / Treated Household	$ 519.31
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	330,207
29	Annual Therm Savings	5,753
30	Lifecycle kWh Savings	2,793,245
31	Lifecycle Therm Savings	30,518
32	Current kWh Rate	$ 0.26
33	Current Therm Rate	$ 1.20
34	Average 1st Year Bill Savings / Treated Households	$ 63.14
35	Average Lifecycle Bill Savings / Treated Households	$ 519.31
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	234,280
41	Annual Therm Savings	(803)
42	Lifecycle kWh Savings	2,210,203
43	Lifecycle Therm Savings	(8,756)
44	Current kWh Rate	$0.26
45	Current Therm Rate	$1.20
46	Average 1st Year Bill Savings / Treated Property	$ 5,446.26
47	Average Lifecycle Bill Savings / Treated Property	$ 51,285.99
48		
49		

	A	B	C	D	E	F	G
1	**Energy Savings Assistance Program Table 4 - Homes/Buildings Treated**						
2	**SDG&E**						
3	**March 2020**						
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	19,358	**19,358**	0	280	**280**
9	San Diego	7,533	305,205	**312,738**	29	1,160	**1,189**
10	**Total**	**7,533**	**324,563**	**332,096**	**29**	**1,440**	**1,469**
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					5	**5**
26	**Total**				**0**	**5**	**5**
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

March 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	3	1	0	0	12	0	4
San Diego	130	7	0	0	316	16	5
Total	**133**	**8**	**0**	**0**	**328**	**16**	**9**

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
March 2020

Table 5A, ESA Program

Month	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)		
		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW		# of First-Tourch	# of Re-treatment	Therm	kWh	kW
January	32	393	12,619	2	0	0	0	0	-	0	397	0	32	19	13	392.76	13,016	2
February	306	2573	74,893	13	0	0	0	0	70	0	24,502	3	376	206	170	2,573	99,395	16
March	789	2788	137689.19	19.58	0	0	0	0	272	0	80106.42	10.55	1,061	775	286	2,788	217,796	30
April																		
May																		
June																		
July																		
August																		
September																		
October																		
November																		
December																		
YTD	**1,127**	**5,753**	**225,202**	**34**	**-**	**-**	**-**	**-**	**342**	**-**	**105,005**	**14**	**1,469**	**1,000**	**469**	**5,753**	**330,207**	**47**

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.

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.

Table 5B, ESA Program - CSD Leveraging

Month	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)		
		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

Month	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)		
		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW
January	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
February	4	(186)	64,409	12	-	-	-	-	1	-	7,609	2	5	(186)	72,018	14
March	5	(617)	145,030	31	-	-	-	-	1	-	17,231	3	6	(617)	162,262	34
April																
May																
June																
July																
August																
September																
October																
November																
December									-	-	-	-	-	-	-	-
YTD	**9**	**(803)**	**209,439**	**43**	**-**	**-**	**-**	**-**	**2**	**-**	**24,840**	**5**	**11**	**(803)**	**234,280**	**48**

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	**March 2020**												
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] [3]	$ 25,000	$ 25,000	$50,000	$0	$0	$0	-$1,500	-$1,500	-$3,000	-6%	-6%	-6%
8													
9													
10	**Total Pilots**	**$25,000**	**$25,000**	**$50,000**	**$0**	**$0**	**$0**	**-$1,500**	**-$1,500**	**-$3,000**	**-6%**	**-6%**	**-6%**
11													
12													
13	**Studies**												
14	Low Income Needs Assessment Study	$ 8,334	$ 8,334	$16,667	$0	$0	$0	$0	$0	$0	0%	0%	0%
15	Load Impact Evaluation Study	$ 9,167	$ 9,167	$18,333	$0	$0	$0	$0	$0	$0	0%	0%	0%
16	Equity Criteria and Non Energy Benefits Evaluation (NEB's)	$ 2,500	$ 2,500	$5,000	$0	$0	$0	$0	$0	$0	0%	0%	0%
17	Unallocated Funds [4]	$ (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 [5]**	**$47,708**	**$47,708**	**$95,416**	**$0**	**$0**	**$0**	**$0**	**$0**	**$0**	**0%**	**0%**	**0%**
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] Negative YTD amount is the result of expense related to thermostats reclassed to Marketing and Outreach (Table 1).												
28	[4] Unallocated funds represent the amount of funds originally requested for the Energy Education Phase II Study which was subsequently not authorized in D.16-11-022. However the budget was authorized and is not unallocated to a specific study [Table 1].												
29	[5] There is no March and YTD expense activity.												
30													
31	**Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.**												
32													
33													

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

SDG&E
March 2020

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

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
32	-	0

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	**CARE Table 1 - CARE Program Expenses**												
2	**SDG&E**												
3	**March 2020**												
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	$ 2,928,754	$ 325,417	$ 3,254,171	$ 325,213	$ 40,195	$ 365,407	$ 497,210	$ 61,453	$ 558,663	17%	19%	17%
7	Processing / Certification Re-certification	$ 465,490	$ 51,721	$ 517,211	$ 59,277	$ 7,326	$ 66,604	$ 149,397	$ 18,465	$ 167,862	32%	36%	32%
8	Post Enrollment Verification	$ 327,300	$ 36,367	$ 363,667	$ 13,154	$ 1,626	$ 14,779	$ 34,007	$ 4,203	$ 38,210	10%	12%	11%
9	IT Programming	$ 1,547,910	$ 171,990	$ 1,719,900	$ 97,122	$ 12,004	$ 109,126	$ 119,985	$ 14,830	$ 134,814	8%	9%	8%
10	Cooling Centers	$ 39,541	$ 4,393	$ 43,935	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
11													
12	Pilots/CHANGES Program [2]	$ 240,960	$ 26,773	$ 267,733	$ 40,496	$ 5,005	$ 45,501	$ 62,549	$ 7,731	$ 70,280	26%	29%	26%
13	Studies [3]	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
14	Regulatory Compliance	$ 273,288	$ 30,365	$ 303,653	$ 29,046	$ 3,590	$ 32,636	$ 75,324	$ 9,310	$ 84,634	28%	31%	28%
15	General Administration	$ 752,622	$ 83,625	$ 836,246	$ 34,246	$ 4,233	$ 38,478	$ 130,815	$ 16,168	$ 146,983	17%	19%	18%
16	CPUC Energy Division	$ 52,067	$ 5,785	$ 57,852	$ 9,443	$ 1,167	$ 10,610	$ 24,397	$ 3,015	$ 27,412	47%	52%	47%
17													
18	**SUBTOTAL MANAGEMENT COSTS**	**$ 6,627,931**	**$ 736,437**	**$ 7,364,368**	**$ 607,996**	**$ 75,146**	**$ 683,142**	**$ 1,093,685**	**$ 135,175**	**$ 1,228,860**	**17%**	**18%**	**17%**
19													
20	CARE Rate Discount	$ 67,114,354	$ 7,457,150	$ 74,571,504	$7,892,121	$1,580,725	**$ 9,472,846**	$25,869,728	$5,590,372	**$ 31,460,100**	39%	75%	42%
21													
22	**TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS**	**$ 73,742,285**	**$ 8,193,587**	**$ 81,935,872**	**$ 8,500,118**	**$ 1,655,871**	**$ 10,155,988**	**$ 26,963,413**	**$ 5,725,547**	**$ 32,688,960**	**37%**	**70%**	**40%**
23													
24	Other CARE Rate Benefits [4]												
25	- DWR Bond Charge Exemption				$549,974		$ 549,974	$1,787,988		$ 1,787,988			
26	- CARE Surcharge Exemption				$673,219	$ 134,271	$ 807,490	$2,217,982	$ 454,850	$ 2,672,832			
27	- California Solar Initiative Exemption				$0		$ -	$0		$ -			
28	- kWh Surcharge Exemption				$36,395		$ 36,395	$103,556		$ 103,556			
29	- Vehicle Grid Integration Exemption				$62,841		$ 62,841	$180,588		$ 180,588			
30	Total Other CARE Rate Benefits				**$ 1,322,429**	**$ 134,271**	**$ 1,456,700**	**$ 4,290,114**	**$ 454,850**	**$ 4,744,964**			
31													
32	Indirect Costs				$ 73,079	$ 9,032	**$ 82,111**	$ 174,979	$ 21,627	**$ 196,605**			
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	[4] YTD Electric amounts have been updated to reflect a January calculation error discovered after January close.												
38													
39	**NOTE: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.**												
40													
42													

CARE Table 2 - Enrollment, Recertification, Attrition, & Penetration[6]
SDG&E
March 2020

	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	69	171	0	240	5,050	1,299	343	236	6,928	7,168	3,861	3,546	4,001	11,408	1,392	66	167	6,323	7,948	18,576	-780	300,720	302,245	99%
February	0	146	0	146	5,282	993	244	241	6,760	6,906	1,911	2,829	4,065	8,805	1,640	75	152	1,169	3,036	15,711	3,870	304,590	302,245	101%
March	0	66	0	66	5,059	899	409	180	6,547	6,613	2,043	2,379	2,287	6,709	57	6	33	3,922	4,018	13,322	2,595	307,185	302,245	102%
April																								
May																								
June																								
July																								
August																								
September																								
October																								
November																								
December																								
YTD Total	**69**	**383**	**0**	**452**	**15,391**	**3,191**	**996**	**657**	**20,235**	**20,687**	**7,815**	**8,754**	**10,353**	**26,922**	**3,089**	**147**	**352**	**11,414**	**15,002**	**47,609**	**5,685**	**307,185**	**302,245**	**102%**

[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
March 2020

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	300,720	1,683	0.6%	6	53	59	3.5%	0.0%
February	304,590	1,213	0.4%	2	11	13	1.1%	0.0%
March	307,185	1,332	0.4%	0	0	0	0.0%	0.0%
April						0	0.0%	0.0%
May						0	0.0%	0.0%
June						0	0.0%	0.0%
July						0	0.0%	0.0%
August						0	0.0%	0.0%
September						0	0.0%	0.0%
October						0	0.0%	0.0%
November						0	0.0%	0.0%
December						0	0.0%	0.0%
YTD Total	**307,185**	**4,228**	**1.4%**	**8**	**64**	**72**	**1.7%**	**0.0%**

[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)
SDG&E
March 2020

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	300,720	570	0.2%	14	13	27	4.7%	0.0%
February	304,590	920	0.3%	1	1	2	0.2%	0.0%
March	307,185	517	0.2%	0	0	0	0.0%	0.0%
April						0	0.0%	0.0%
May						0	0.0%	0.0%
June						0	0.0%	0.0%
July						0	0.0%	0.0%
August						0	0.0%	0.0%
September						0	0.0%	0.0%
October						0	0.0%	0.0%
November						0	0.0%	0.0%
December						0	0.0%	0.0%
YTD Total	**307,185**	**2,007**	**0.7%**	**15**	**14**	**29**	**1.4%**	**0.0%**

[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	**March 2020**						
4		**Provided**	**Received**	**Approved**	**Denied**	**Pending/Never Completed**	**Duplicates**
5	Total (Y-T-D)	1,339	47,167	18,805	6,065	795	21,502
6	Percentage		100%	40%	13%	2%	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.						
10							

CARE Table 5 - Enrollment by County
SDG&E
March 2020

County	Estimated Eligible Households			Total Households Enrolled			Penetration Rate		
	Urban	Rural	Total	Urban	Rural	Total	Urban	Rural	Total
Orange	14,908	0	14,908	13,076	0	13,076	88%	NA	88%
San Diego	281,284	6,053	287,337	287,578	6,531	294,109	102%	108%	102%
Total	**296,192**	**6,053**	**302,245**	**300,654**	**6,531**	**307,185**	**102%**	**108%**	**102%**

1 As reflected in filing A.14-11-007, et al., Annual CARE Eligibility Estimates filed February 12, 2020.

[2] Total Households Enrolled includes submeter tenants.

[3] No Rural eligible population exists in Orange County in SDG&E territory, therefore penetration for Orange County Rural is not applicable.

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

CARE Table 6 - Recertification Results
SDG&E
March 2020

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)
January	300,720	5,874	2.0%	2,075	168	35.3%	0.1%
February	304,590	5,558	1.8%	1,122	32	20.2%	0.0%
March	307,185	5,172	1.7%	299	1	5.8%	0.0%
April							
May							
June							
July							
August							
September							
October							
November							
December							
YTD	**307,185**	**16,604**	**5.4%**	**3,496**	**201**	**21.1%**	**0.1%**

1 As reflected in filing A.14-11-007, et al., Annual CARE Eligibility Estimates filed February 12, 2020.

[2] Data represents total residential electric customers.

[3] Includes customers who did not respond or who requested to be de-enrolled.

[4] Percentage of customers recertified compared to the total participants requested to recertify in that month.

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

CARE Table 7 - Capitation Contractors[1]
SDG&E
March 2020

Contractor	Contractor Type (Check one or more if applicable)				Total Enrollments	
	Private	CBO	WMDVBE	LIHEAP	Current Month	Year-to-Date
211 SAN DIEGO		X			124	441
211 ORANGE COUNTY		X			-	-
ALLIANCE FOR AFRICAN ASSISTANCE		X			-	-
AMERICAN RED CROSS WIC OFFICES		X	X		-	3
CATHOLIC CHARITIES		X			-	-
CHULA VISTA COMMUNITY COLLABORATIVE		X			-	4
COMMUNITY RESOURCE CENTER		X			1	6
HEARTS AND HANDS WORKING TOGETHER		X			-	-
HOME START		X			-	-
HORN OF AFRICA		X			-	-
INTERFAITH COMMUNITY SERVICES		X			-	-
LA MAESTRA FAMILY CLINIC		X		X	-	0
MAAC PROJECT		X			2	10
NEIGHBORHOOD HEALTH CARE	X				-	2
NORTH COUNTY HEALTH SERVICES		X			-	3
SAN DIEGO STATE UNIVERSITY WIC OFFICES		X			-	2
SAN YSIDRO HEALTH CENTERS		X			1	7
SCRIPPS HEALTH WIC		X			-	1
UNION OF PAN ASIAN COMMUNITIES SAN DIEGO(UPAC)		X			-	-
VISTA COMMUNITY CLINIC		X			-	-
Total Enrollments					**128**	479

[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.

	A	B	C	D	E	F	G	H	I
1	**CARE Table 8 - Households as of Month-End**								
2	**SDG&E**								
3	**March 2020**								
4	**Month**	**Gas and Electric**	**Gas Only**	**Electric Only**	**Total**	**Eligible Households[1]**	**Penetration**	**% Change**	**Total Residential Accounts[2]**
5	January	189,992	0	113,571	303,563	302,245	100%	0.2%	1,348,549
6	February	190,640	0	113,950	304,590	302,245	101%	0.2%	1,349,481
7	March	192,413	0	114,772	307,185	302,245	102%	0.2%	1,350,713
8	April								
9	May								
10	June								
11	July								
12	August								
13	September								
14	October								
15	November								
16	December								
17	**YTD**	**192,413**	**N/A**	**114,772**	**307,185**	**302,245**	**102%**	**0.2%**	**1,350,713**
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									

CARE Program Table 9 - Expenditures for Pilots/CHANGES Program[1]
SDG&E
March 2020

2019	Authorized 2019 Budget Total	Current Month Expenses Total	Expenses Since Jan. 1, 2019 Total	% of 2019 Budget Expensed Total
CHANGES Program	$ 267,733	$ 45,501	$ 70,280	26%
Total	**$ 267,733**	**$ 45,501**	**$ 70,280**	**26%**

1. Decision 15-12-047 transitioned CHANGES pilot to CHANGES program and funding for the effort is captured herein.

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 February 2020[1]	
No. of attendees at education sessions	**105**
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	11
High Energy CARE User	2
Medical Baseline Application	0
Payment Extension	0
Payment Plan	0
Request Bill Adjustment	8
Request Customer Service Visit	5
Request Meter Service or Testing	3
Schedule Energy Audit	0
Solar	0
Stop Disconnection	0
Time of Use	0
Wildfire Related Issue	0
Total disputes [3]	**29**

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 Allerts	0
Enrolled in Demand Response Programs	0
ESAP	0
HEAP	0
Medical Baseline	0
Neighbor to Neighbor	10
REACH	0
Reported Safety Problem	0
Reported Scam	0
Set Up 3rd Party Notification	0
Set Up New Account	8
Payment Extension	2
Payment Plan	0
Wildfire Related Issue	0
Total Needs Assistance [2]	**20**

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: Amharic, Arabic, Dari, French, Spanish

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

February 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	ASL	CARE/FERA and Other Assistance Programs	3	N/A	21	CHANGES Ed Handout
N/A	Spanish	High Energy Use	2	N/A	34	CHANGES Ed Handout
N/A	Spanish	Understanding Your Bill	1	N/A	50	CHANGES Ed Handout
Month Total			6		105	
Year-to-Date			357		1623	

[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 August 1st, 2019, CHANGES one-on-one data reports have moved from quarterly to monthly for the program year. The data for March 2020 will be reported once received.

[3] Date of the workshops not available.

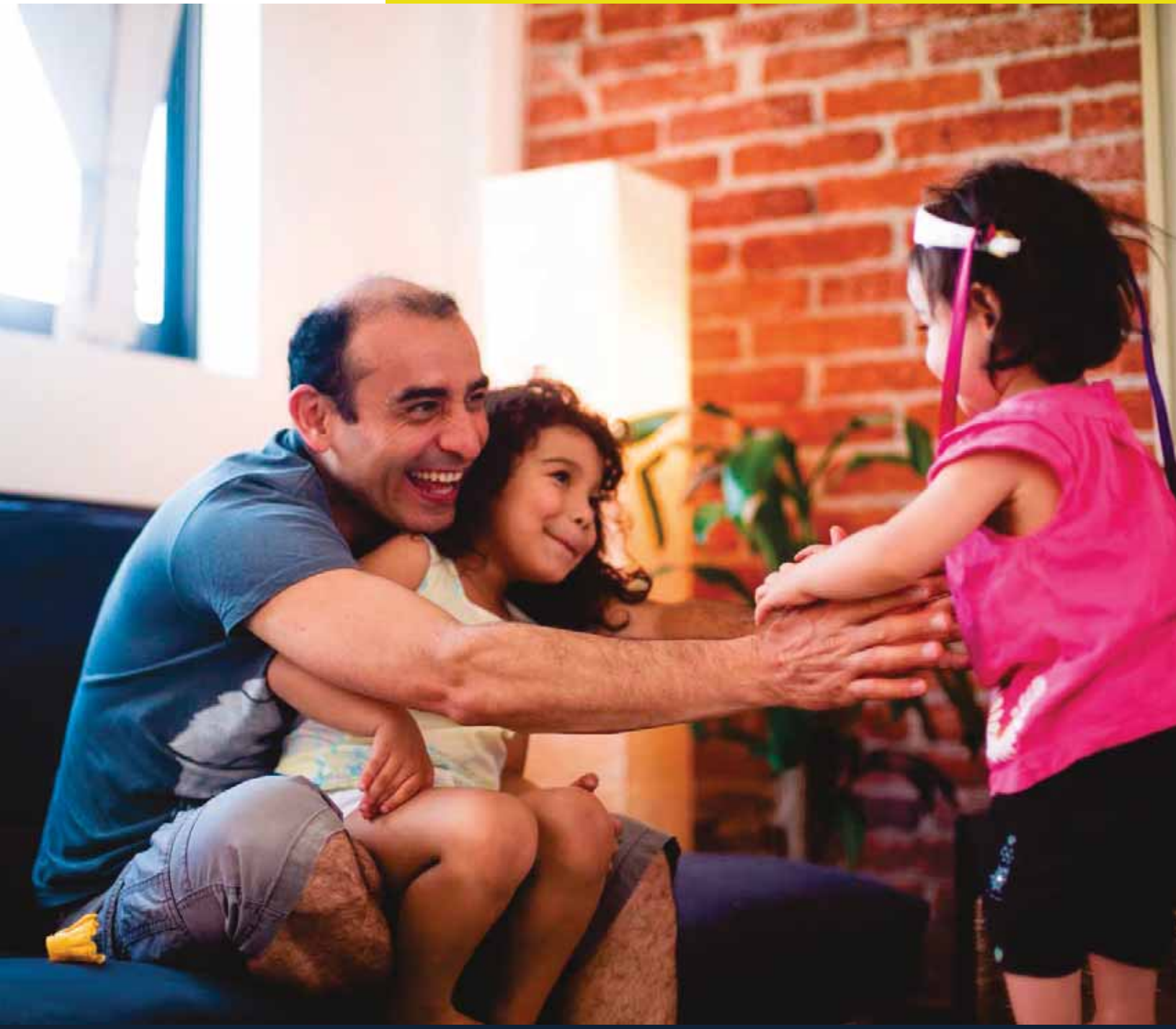
[4] Contractor states all sessions last at least 30 minutes.

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

Appendix B
Assistance Presentation

2020 CARE

OUTREACH AND COMMUNICATIONS EFFORTS



COMPILED BY

SAN DIEGO GAS & ELECTRIC

MARKETING MATERIALS

To raise broad awareness of the CARE/FERA discount programs, SDG&E has launched a multi-media, multi-lingual marketing effort, which includes television ads, ads on streaming TV and radio, print ads, paid social media, digital banner ads, emails, direct mail, bill onserts and inserts, and other printed material. The campaign encompasses materials in Spanish, Chinese, Tagalog, and Vietnamese. The campaign started in March and will run through the end of November.

MARKETING MATERIALS

CARE TV

SDGE

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CARE TV

ENGLISH
https://vimeo.com/402695135/c83d6e187c

SPANISH
https://vimeo.com/402695595/8ffda4fc31

MARKETING MATERIALS

ZOOM TV

ZOOM TV

ENGLISH
https://vimeo.com/403781567/ea8a83a6e0

SPANISH
https://vimeo.com/404619408/c7f7a84d33

SDGE

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MARKETING MATERIALS

CARE PRINT AD & DIGITAL BANNER - ENGLISH

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CARE DIGITAL BANNER AD

ENGLISH
https://viewad.at/20sdg163677

CUSTOMER ASSISTANCE COLLATERAL

ENGLISH

Support available when you need it

SDGE
A Sempra Energy utility®

Help is just a click or phone call away.

Helping you save

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

Save money & energy

Save 30% or more on your monthly bill

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

Lower electric rates

If you do not qualify for CARE, you may be eligible for the Family Electric Rate Assistance (FERA) program. FERA provides income-qualified households of three or more with a reduced electric rate that can save 18% every month on your bill. To apply, visit **sdge.com/fera**.

Lower energy costs for those with medical needs

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

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

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

Free services and appliances for your home

Energy Savings Assistance Program**

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

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

Cash back on energy-saving products and projects

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

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

continued on back →

- Before you make your purchase or start your project, call our Energy Savings Center at **1-800-644-6133** or visit **sdge.com/rebates**. We'll help you determine what qualifies and how much cash back you'll receive.

My Energy Survey

To learn how your home uses energy, take our free My Energy Survey. You'll receive a customized report that shows where your energy dollars are going and an action plan with tips and ideas based on your answers to the survey. Visit **sdge.com/survey** for more details.

Payment options & specialized services

Online

Our online bill pay service, My Account, is convenient, easy, secure and free. This payment option allows you to:

- Choose the day and amount you'd like to pay.
- Set up recurring payments.
- Establish a payment arrangement schedule if you can't pay your bill in full.

Once you sign up, you'll receive a monthly email message. This will let you know that your bill is ready to be viewed and paid online. To enroll visit **sdge.com/myaccount**.

Level Pay Plan (LPP)

If you'd like to have more predictable energy bills each month, our Level Pay Plan is free and can help. LPP will average your annual energy use and costs during a 12-month period. You pay an average bill amount each month instead of actual charges. To apply call **1-800-411-7343** or visit **sdge.com/lpp**.

Payment arrangements

If you have difficulty paying your SDG&E bill, call **1-800-411-7343**. In many cases we can help you with an overdue bill by simply spreading it out over a few months. Our energy service specialists will work with you to adjust payments to fit your needs.

Help paying your bill

If you meet established income guidelines, you may qualify for help with your energy bill. Emergency bill payment assistance and home repair services are available through the Low-Income Home Energy Assistance Program (LIHEAP). Call the Department of Community Services and Development at **1-866-675-6623** for more information or visit their website at **csd.ca.gov**.

Neighbor-to-Neighbor

A one-time assistance payment toward your SDG&E bill is available from the Neighbor-to-Neighbor program. If you're facing an interruption of service and don't qualify for government assistance you may be eligible. Call **211** for more information or to see if you qualify.

Third-party notification

You can designate a friend, relative or community agency to receive a copy of your late payment notices from us. This "third party" can remind you that your payment is late and offer advice or assistance. To enroll, call **1-800-411-7343** or visit **sdge.com/thirdparty**.

Vision impairment

If you or someone you know is vision impaired, information from your SDG&E bill is available in braille. To make a request, call us at **1-800-411-7343**.

Automated notification of outages

If extreme heat poses a health risk for anyone in your home and your living space must be kept at a constant temperature, sign up for advance notification phone calls about state-directed rotating outages. To learn more call **1-800-411-7343** or visit **sdge.com/tempsensitive**.

Contact information

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

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

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CUSTOMER ASSISTANCE COLLATERAL

SPANISH

Soporte disponible cuando lo necesite

SDGE
A Sempra Energy utility®

Tan solo haga clic o llame para obtener ayuda

Ayudándole a ahorrar
Si está interesado en una manera más fácil de pagar su recibo de energía de SDG&E®, conservar energía o conocer más sobre algunos servicios especializados, podemos ayudarle.

Ahorre dinero y energía

Ahorre 30% o más en su recibo mensual
Con el programa de Tarifas Alternas de Energía de California (CARE, por sus siglas en inglés)*, puede ahorrar cada mes en su recibo de energía. La elegibilidad se basa en la participación en ciertos programas de asistencia pública o ingresos familiares actuales y el número de personas que viven en su hogar. Para solicitarlo, visite ***sdge.com/asistencia***.

Tarifas eléctricas más bajas
Si no califica para CARE, tal vez si califique para el Programa Familiar de Reducción de Tarifas Eléctricas (FERA, por sus siglas en inglés). FERA proporciona a hogares elegibles con tres ingresos o más con una tarifa eléctrica reducida que puede ahorrar 18% cada mes en su recibo. Para aplicar, visite ***sdge.com/asistencia***.

Costos de energía más bajos para quienes tienen necesidades médicas
El Programa de Asignación Médica Inicial ha ayudado a más de 50,000 personas con necesidades médicas o dispositivos médicos que cumplen con los criterios a reducir sus costos de energía. Contáctenos si alguien en su hogar tiene:

- Una necesidad médica que califica, como un sistema inmunológico débil o una enfermedad que implica un riesgo mortal
- Cualquier condición médica que requiera calefacción y/o aire acondicionado adicional para sostener la vida de la persona
- Uno de los dispositivos médicos listados en la aplicación

Tenga en cuenta que los ingresos familiares no son factor para calificar, pero la certificación de un médico en su solicitud sí es necesaria. Para aplicar llame al **1-800-411-7343** o visite ***sdge.com/asistencia***.

Servicios y electrodomésticos gratuitos para su hogar
Si reúne los requisitos para participar en el Programa de Asistencia de Ahorro de Energía**, le ofreceremos mejoras gratuitas para ahorrar energía en el hogar para su apartamento, condominio, casa o casa móvil. Puede obtener gratis luces, que le reparen el calefactor, que coloquen burletes, que aíslen el ático y hasta algunos aparatos domésticos.

Energy Savings Assistance Program®

Si es inquilino, tenga en cuenta que necesita permiso por escrito por parte de su arrendador para recibir estos servicios. Llame al **1-866-597-0597** o visite ***sdge.com/esap*** para solicitar.

Reembolso de efectivo en productos y proyectos de ahorro de energía
Estamos comprometidos a crear maneras de ayudarle a ahorrar energía y dinero. Ofrecemos reembolso de efectivo en compras y mejoras que haga para su casa y que cumplan con los requisitos.

*Un consumo elevado de energía puede resultar en que se le retire del programa.
**SDG&E no otorga garantía en bienes y servicios brindados a clientes. Hogares que anteriormente hayan participado en el programa pueden ser excluidos de su participación adicional en el programa.

continúa atrás »

» Antes de hacer su compra o empezar su proyecto, llame a nuestro Centro de Ahorro de Energía al **1-800-644-6133** o visite ***sdge.com/rebates***. Le ayudaremos a determinar qué califica y cuánto reembolso recibirá.

Encuesta My Energy
Para saber cómo su hogar utiliza energía, realice nuestra encuesta gratuita de My Energy. Recibirá un informe personalizado que muestre en donde gasta más, así como un plan de acción con consejos e ideas basados en sus respuestas. Visite ***sdge.com/survey*** para más detalles.

Opciones de pago y servicios especializados

En línea
Nuestro servicio de pago en línea, My Account, es conveniente, fácil, seguro y gratuito. Esta opción de pago le permite:

- Elegir el día y la cantidad que desea pagar
- Configurar pagos recurrentes
- Establecer un calendario de arreglos de pago si no puede pagar su recibo en su totalidad

Una vez que se registre, recibirá un mensaje de correo electrónico mensual. Esto le permitirá saber que su recibo está disponible y puede ser pagado en línea. Para inscribirse visite ***sdge.com/myaccount***.

Plan de Pago Nivelado (LPP, por sus siglas en inglés)
Si desea tener recibos de energía más predecibles cada mes, nuestro Plan de Pago Nivelado es gratuito y puede ayudarlo. LPP promediará su consumo anual de energía y costos durante un período de 12 meses. Usted paga un monto promedio del recibo cada mes en lugar de cargos reales. Para aplicar llame al **1-800-411-7343** o visite ***sdge.com/lpp***.

Arreglos de pago
Si tiene dificultades para pagar su recibo de SDG&E, llame al **1-800-411-7343**. En muchos casos, podemos ayudarle con un pago retrasado. Simplemente extenderemos su pago durante unos meses. Nuestros especialistas de servicios de energía trabajarán con usted para ajustar los pagos a su necesidad.

Ayuda para pagar su recibo
Si cumple con las pautas de ingresos establecidos, puede calificar para recibir ayuda en su recibo de energía. La asistencia de pago de recibos de emergencia y los servicios de reparación de viviendas están disponibles a través del Programa de Asistencia de Energía para Hogares de Bajos Ingresos (LIHEAP, por sus siglas en inglés). Llame al Departamento de Servicios Comunitarios y Desarrollo al **1-866-675-6623** para obtener más información o visite ***csd.ca.gov***.

Vecino-a-vecino
Un pago de asistencia único para su recibo de SDG&E está disponible en el programa Vecino-a-Vecino. Si usted está enfrentando una interrupción de servicio y no califica para asistencia del gobierno, usted puede ser elegible. Llame al **211** para obtener más información o para ver si califica.

Notificación de terceros
Puede designar a un amigo, pariente o agencia comunitaria para recibir una copia de sus avisos de pagos atrasados de nuestra parte. Este "tercero" puede recordarle que su pago está retrasado y ofrecerle asesoramiento o asistencia. Para inscribirse llame al **1-800-411-7343** o visite ***sdge.com/thirdparty***.

Discapacidad visual
Si usted o alguien que conoce tiene problemas de visión, la información de su recibo de SDG&E está disponible en braille. Para hacer una solicitud, llámenos al **1-800-411-7343**.

Notificación automatizada de interrupciones
Si el calor extremo representa un riesgo para la salud de un miembro en su hogar y su espacio vital debe mantenerse a una temperatura constante, inscríbase para recibir llamadas telefónicas de notificación anticipada sobre apagones rotativos dirigidos por el estado. Para obtener más información, llame al **1-800-411-7343** o visite ***sdge.com/tempsensitive***.

Información de contacto

Para obtener más información sobre nuestros programas y servicios, incluyendo calificaciones de ingresos y referencias a agencias comunitarias, póngase en contacto con nosotros llamando al **1-800-411-7343**. Para TDD/TTY llame al **1-877-889-7343** o voz (emergencias): **1-800-611-7343**. También puede visitar nuestro sitio web en ***sdge.com/asistencia***.

P.O. Box 129831 | San Diego, CA 92112-9831 | 1-800-411-7343 | Conéctese en **sdge.com/asistencia**

Algunos de estos programas son financiados por los clientes de compañías de servicios públicos de California y administrados por San Diego Gas & Electric bajo la supervisión de la Comisión de Servicios Públicos de California.

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CARE EZ APPLICATION

ENGLISH & SPANISH

Save on your SDG&E® bill

RESIDENTIAL RATE ASSISTANCE APPLICATION FOR CARE AND FERA

SDGE A Sempra Energy utility

Your Name

Home Telephone

Home Address, Apartment, City, Zip Code

Mobile Phone

SDG&E® Account Number

Email Address

How would you like to be contacted? ☐ Email ☐ Mail

1 Household information: Please complete

Number of persons in your household: Adults: ☐ + Children: ☐ = ☐

Please complete either section 2A OR 2B, then go to section 3.

2A Public assistance programs: (For CARE Program Only)

If you or someone in your household receives benefits from any of the following public assistance programs check all that apply. Fill out section 2A or 2B. You do not need to complete both sections.

- ☐ Bureau of Indian Affairs General Assistance
- ☐ CalFresh/Supplemental Nutrition Assistance Program (SNAP)
- ☐ CalWORKs/Temporary Assistance for Needy Families (TANF)
- ☐ Low-Income Home Energy Assistance Program (LIHEAP)
- ☐ Medicaid/Medi-Cal for Families A & B
- ☐ National School Lunch Program (NSLP)
- ☐ Supplemental Security Income (SSI)
- ☐ Tribal TANF
- ☐ Women, Infants, and Children Program (WIC)
- ☐ Head Start Income Eligible (Tribal Only)

OR

If you do not participate in any of the above programs, please complete Section 2B.

2B Household income eligibility: (For CARE or FERA Programs)

If your household does not participate in a public assistance program, please check all sources of household income for all members of the household and write the total income in the spaces provided.

You must check (✓) all sources of your household's income, including:

- ☐ Wages and/or profits from self employment
- ☐ Rent or royalty income
- ☐ Pensions
- ☐ Social Security
- ☐ SSP or SSDI
- ☐ Disability or workers' compensation payments
- ☐ Unemployment benefits
- ☐ Scholarships, grants or other aid for living expenses
- ☐ Interest/dividends from savings, stocks, bonds or retirement accounts
- ☐ Spousal or child support
- ☐ Insurance or legal settlements
- ☐ Cash or other income

Total annual household income: $ ☐,☐☐☐.00

3 Declaration: (please read and sign below)

I state the information I have provided in this application is true and correct. I agree to provide proof of income if asked. I agree to inform SDG&E if I no longer qualify to receive the discount. I know that if I receive any discount without qualifying for it, I may be required to pay back the discount I received. I understand that SDG&E can share my information with other utilities or their agents to enroll me in their assistance programs.

Income Qualification for CARE & FERA Programs

Effective June 1, 2019 - May 31, 2020

Number in Household	CARE Program	FERA Program
	Total Annual Household Income*	
1 or 2	$33,820	Not eligible
3	$42,660	$42,661 – $53,325
4	$51,500	$51,501 – $64,375
5	$60,340	$60,341 – $75,425
6	$69,180	$69,181 – $86,475
7	$78,020	$78,021 – $97,525
8	$86,860	$86,861 – $108,575
Each additional person, add	$8,840	$8,840 – $11,050

* To figure your current total gross household income, combine all money and non-cash benefits received by every person living in your home.

High energy use may result in removal from the program.

Customer Signature

Date

SOURCE CODE

EMPLOYEE ID

Ahorre en la factura de SDG&E®

ASISTENCIA TARIFARIA RESIDENCIAL FORMULARIO DE SOLICITUD PARA CARE Y FERA

SDGE A Sempra Energy utility

Su nombre

Teléfono de casa

Número y calle, Apartamento, Ciudad, Código postal

Teléfono móvil

Número de cuenta de SDG&E®

Dirección de correo electrónico

¿Cómo le gustaría que lo contactáramos? ☐ Correo electrónico ☐ Correo

1 Información del hogar: Favor de llenar

Número de personas en el hogar: Adultos: ☐ + Niños: ☐ = ☐

Por favor llene ya sea la sección 2A O 2B, y luego vaya a la sección 3.

2A Programas de Asistencia Pública: (para el Programa CARE únicamente)

Si usted o alguien en su hogar recibe beneficios de cualquiera de los siguientes programas de asistencia pública, marque todos los que corresponden. Llene la sección 2A o 2B. No necesita llenar ambas secciones.

- ☐ Buró de Asistencia General para Asuntos de Nativos Americanos
- ☐ CalFresh/Programa Suplementario de Asistencia Nutricional (SNAP)
- ☐ CalWORKS/Asistencia Temporal para Familias Necesitadas (TANF)
- ☐ Programa de Asistencia a Hogares de Escasos Recursos para Gastos de Energía (LIHEAP)
- ☐ Medicaid/Medi-Cal para Familias A y B
- ☐ Programa Nacional de Almuerzos Escolares (NSLP)
- ☐ Seguridad de Ingreso Suplementario (SSI)
- ☐ TANF Tribal
- ☐ Programa para Mujeres, Bebés y Niños (WIC)
- ☐ Ingreso elegible para Head Start (tribal únicamente)

OR

Si no participa en ninguno de los programas anteriores, por favor llene la sección 2B.

2B Requisitos de ingreso en el hogar: (para los Programas CARE o FERA)

Si su hogar no participa en un programa de asistencia pública, por favor marque todas las fuentes de ingreso del hogar para todos los miembros del hogar y escriba el ingreso total en los espacios señalados.

Debe marcar (✓) todas las fuentes de ingreso de su hogar, como:

- ☐ Salarios y/o utilidades por autoempleo
- ☐ Ingresos por alquiler o regalías
- ☐ Pensiones
- ☐ Seguro Social
- ☐ SSP o SSDI
- ☐ Pagos por incapacidad o indemnización para los trabajadores
- ☐ Beneficios de desempleo
- ☐ Becas, subvenciones u otra ayuda para sufragar el costo de la vida
- ☐ Intereses/dividendos de ahorros, acciones, bonos o cuentas para el retiro
- ☐ Pensión conyugal o alimenticia
- ☐ Liquidaciones de seguro o legales
- ☐ Ingreso en efectivo o de otro tipo

Ingreso total anual en el hogar: $ ☐,☐☐☐.00

3 Declaración: (favor de leer y firmar en la parte inferior)

Declaro que la información que proporcioné en esta formación de solicitud es verdadera y correcta. Estoy de acuerdo en proporcionar comprobantes de ingreso si me son solicitados. Estoy de acuerdo en informar a SDG&E si ya no cumplo los requisitos necesarios para recibir el descuento. Entiendo que si recibo algún descuento sin reunir los requisitos para él mismo, tal vez se me exija devolver el importe del descuento que recibí. Entiendo que SDG&E puede compartir mi información con otras empresas de servicios públicos o con sus agentes para inscribirme en sus programas de asistencia.

Requisitos de ingreso para los Programas CARE y FERA

*En vigor del 1 de junio de 2019 al 31 de mayo de 2020

Número de personas que viven en el hogar	Programa CARE	Programa FERA
	Ingreso total anual en el hogar*	
1–2	$33,820	Not eligible
3	$42,660	$42,661 – $53,325
4	$51,500	$51,501 – $64,375
5	$60,340	$60,341 – $75,425
6	$69,180	$69,181 – $86,475
7	$78,020	$78,021 – $97,525
8	$86,860	$86,861 – $108,575
Por cada persona adicional, añada	$8,840	$8,840 – $11,050

* Para calcular el actual ingreso bruto total en el hogar, combine todo el dinero en efectivo y beneficios no monetarios que recibe cada una de las personas que vive en su hogar.

Un consumo elevado de energía puede dar como resultado el que se le quite del programa.

Firma del cliente

Fecha

SOURCE CODE

EMPLOYEE ID

SDGE

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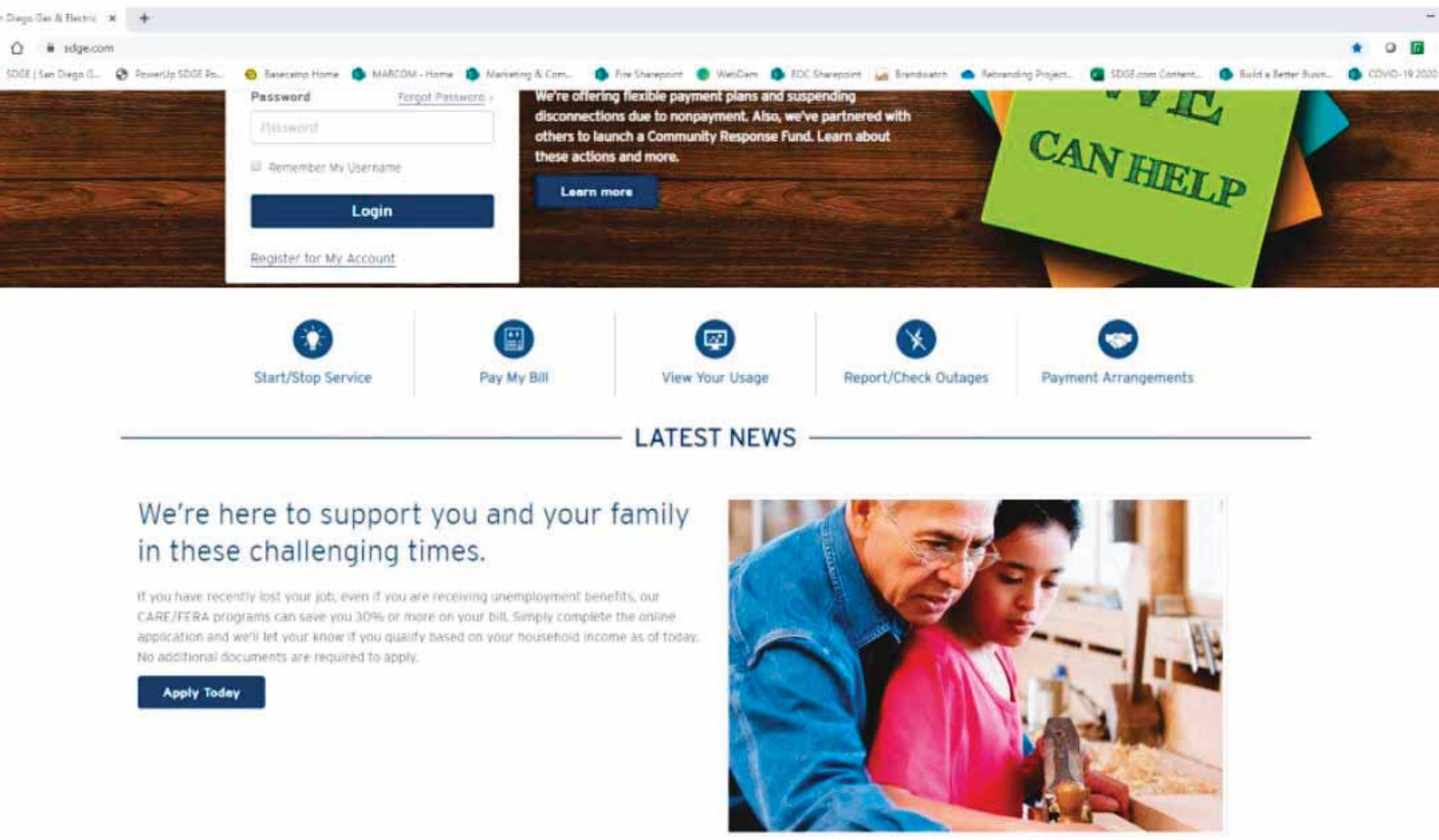
SDGE.COM WEB UPDATES

SDGE HOME PAGE - SDGE.COM



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SDGE.COM WEB UPDATES

CORONAVIRUS LANDING PAGE – SDGE.COM/CORONAVIRUS

sdge.com/coronavirus

Scam Alert | Safety Measures | Facilities and Operations | Energy Saving Tips

Providing Reliable Service

Safety is our highest priority at SDG&E. To us, safety first means that we take seriously our responsibility to prepare for crises, just like the current coronavirus outbreak. Our goal is to maintain safe and reliable electric and natural gas services 24 hours a day, 7 days a week, 365 days a year.

Please know that we have strong plans in place to keep power flowing. As a company that provides a critical service to the community, we have decades of experience preparing and responding to crises.

Payment Help

Shutting Off Power: SDG&E knows that our customers' lives and income have been affected by this public health crisis. For that reason, SDG&E will not shut off service to customers with unpaid bills until further notice. Nothing means more to us than the health and safety of you and your loved ones and the last thing we want you to worry about is whether you can afford to keep your lights on.

Flexible Payment Plans: If you're having trouble paying your energy bill, please call us at 1-800-411-7343 to work out a payment plan.

Assistance Programs: If you have recently lost your job, even if you are receiving unemployment benefits, our CARE/FERA programs can save you 30% or more on your bill. Simply complete the online application and we'll let your know if you qualify based on your household income as of today. No additional documents are required to apply. Learn more.

Late Payment Fees: SDG&E will not charge late payment fees for business customers whose finances have been hit by the coronavirus situation. We do not charge residential customers late payment fees.

Branch Offices/Payment Locations: At this time, our branch offices are closed. Some payment locations in retail stores may be open, but that can change as the days go on. We encourage our customers to follow the order from authorities to remain at home. You can always pay your bill online via My Account or through our mobile app.

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SDGE.COM WEB UPDATES

CARE LANDING PAGE – SDGE.COM/CARE

sdge.com/residential/pay-bill/get-payment-bill-assistance/assistance-programs

30% or more off your energy bill can help you rest a little easier.

CARE and **FERA** are two programs we offer that can provide you with a monthly discount on your bill. If you have recently lost your job, even if you are receiving unemployment benefits, you may qualify for a reduced energy rate through our CARE or FERA programs. Income qualifications are based on household income as of today. No additional documents are required to apply.

California Alternate Rates for Energy (CARE) - Offers a **30%** or more monthly bill discount. Qualification is based on participation in certain public assistance programs or by income guidelines.

Family Electric Rate Assistance (FERA) - If you're not eligible for CARE, you may qualify for an **18%** monthly bill discount through FERA. FERA is only open to households with three or more people. Qualification is based on income guidelines.

When you apply for CARE/FERA, we'll also see if you qualify for no-cost energy-efficient home improvements . Only one application is needed to check your eligibility for these programs.

To continue receiving these program benefits, you must maintain acceptable energy usage levels. **High energy use may lead to removal.**

Apply, Renew or Verify - select from the options below:

Sign up today!

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OTHER COMMUNICATIONS AND OUTREACH EFFORTS

PRESS RELEASE (SCHEDULED TO BE DISTRIBUTED THE WEEK OF APRIL 6).

SDGE

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NEWS RELEASE - DRAFT

Media Contact: Helen Gao
San Diego Gas & Electric
877-866-2066
sdge.com
Twitter: @sdge

SDG&E OFFERS BILL DISCOUNT PROGRAMS TO HELP CUSTOMERS IN NEED

Company is Also Supporting Local Relief Efforts for Workers and Families Impacted by Unemployment due to COVID-19

SAN DIEGO, April XX, 2020 – With the coronavirus pandemic causing financial hardships for many individuals and families in the region, San Diego Gas & Electric (SDG&E) is encouraging those in need to apply online for bill discount programs, which can save them 30% or more off their monthly utility bill.

SDG&E offers bill discount programs to support customers year-round. Many people who previously did not qualify for these income-based programs may now qualify due to lost wages. For those who recently lost their job, even if they are receiving unemployment benefits, may still be eligible for CARE and FERA.

- **California Alternate Rates for Energy (CARE):** Provides a 30% or more discount on monthly bills. Qualification is based on participation in certain public assistance programs or by income guidelines.
- **Family Electric Rate Assistance (FERA):** If a customer doesn't qualify for CARE, they may qualify for FERA, which provides income-qualified households of three or more with a reduced electric rate (18%) on their monthly bill.

OTHER COMMUNICATIONS AND OUTREACH EFFORTS

LETTER SENT TO NONPROFIT COMMUNITY PARTNERS (SENT TO MORE THAN 400 COMMUNITY PARTNERS)

Dear Community Partners:

SDG&E is very much concerned by the economic hardship that many of our non-profit partners and the people that you serve are facing due to the coronavirus pandemic (COVID-19).

We want to remind you of SDG&E's direct assistance programs that can help people experiencing financial hardship due to COVID-19. Many may qualify for SDG&E assistance programs and bill discount programs. Those programs are available at https://www.sdge.com/residential/pay-bill/get-payment-bill-assistance/assistance-programs and include the following:

- California Alternate Rates for Energy (CARE): Provides a 30% or more discount on monthly bills for customers with qualifying current household income or customers who are participating in certain public assistance programs.
- Family Electric Rate Assistance (FERA): If a customer doesn't qualify for CARE, they may qualify for FERA, which provides income-qualified households of three or more with a reduced electric rate (12%) on their monthly bill.
- Medical Baseline Allowance: Customers who have a qualifying medical need or necessarily use a medical device (i.e. for a compromised immune system, life-threatening illness, or any condition where additional heating and air conditioning or a qualifying device is medically necessary to sustain a person's life) are eligible for a significant discount on their energy bill. Household income is not a factor for qualifying, but a doctor's certification on the application is required.

If you are aware of people that have been economically affected by COVID-19 who might benefit from these programs, please forward this message to them and welcome them to apply for assistance.

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OTHER COMMUNICATIONS AND OUTREACH EFFORTS

LETTER SENT TO NONPROFIT COMMUNITY PARTNERS (SENT TO MORE THAN 400 COMMUNITY PARTNERS)

Dear Energy Solutions Partner,

In recent days, as our country, state, and region mobilize to contain the spread of the coronavirus, San Diego Gas &Electric (SDG&E) has taken numerous actions to protect our customers and employees, help impacted customers and minimize service disruptions.

In lieu of sharing our #energytips4u monthly messaging, we are asking you to help us share the messaging in the attached SDG&E COVID-19 Social Media Response Toolkit.

In this toolkit you will find COVID-19 messages that are already live on the SDG&E's social media accounts, including messages about the COVID-19 Community Response Fund that SDG&E helped to launch with a $1 million donation, the temporary suspension of service disconnections due to nonpayment and the cancellation of non-critical planned outages.

Visit sdge.com/coronavirus for a comprehensive overview of our COVID-19 response and sdge.com/assistance for information on CARE, FERA and Medical Baseline customer assistance programs that are available for those who meet income guidelines or have a qualifying medical condition and need certain medical equipment in their home. With many experiencing financial hardships due to the economic impact of the pandemic, more customers may qualify for these bill discount programs.

We value your partnership in helping us amplify important COVID-19 information that can help those who especially need our help now due to the pandemic. Please contact me if you have any questions.

OTHER COMMUNICATIONS AND OUTREACH EFFORTS

CUSTOMER CALL CENTER SCRIPT (ENGLISH AND SPANISH)

CARE and Payment Arrangement Discussions—SDG&E Call Center

SDG&E's Energy Service Specialists use the following guidelines. These guidelines were first established in early March and continue to be refined as conditions change.

Payment Arrangements

No specific script. The following guidelines that are posted throughout the call center and emphasized each day at the start of each shift. These guidelines are also located within each Energy Service Specialists information management tool:

Due to the COVID-19 pandemic, many customers are facing financial or other hardships. Therefore, great empathy and sympathy should be provided to those customers requesting assistance during this difficult time. Customers stating that they are having difficulty paying their bill may be offered lenient payment arrangements from 3 – 6 installments, and up to 12-months of installments if necessary. In addition, customers experiencing any financial hardship or indication of hardship should be referred to 211 San Diego for assistance paying their utility bill.

CARE

When offering CARE, an Energy Service Specialist states the following, and also encourages the customer to enroll:
"Our CARE program offers a monthly discount of 30% or more on your SDG&E bill for both gas and electric. Eligibility is based on enrollment in public assistance programs or by meeting household income qualifications, based on the number of people living in your home. You can apply online at sdge.com, via our automated enrollment number at 877-646-5525 or I can send you an application."

SDG&E has a list of keywords or phrases that customers may say during a call that triggers the Energy Service Specialist to offer CARE and to encourage that the customer apply:

- Any mention of hardship or initiation of a payment arrangement due to Covid-19
- I just lost my job." or "I'm currently looking for a job."
- "I'm going through financial difficulty/hardship"
- "Unemployment" or "I'm waiting for my unemployment check."
- "I've been having health issues and can't work." or "I've been in and out of the hospital and haven't been working."
- "I work in construction and haven't been working much lately due to the weather."
- "I am a single parent." or "I take care of my mother/father/grandparent, etc."
- "I am on a fixed income." or "I am a senior."

SOCIAL MEDIA

PAID SOCIAL ADS

Financial assistance for those that need it.

Learn More

San Diego Gas & Electric

Sponsored (demo)

For many San Diegans, meeting everyday needs isn't easy. Especially in these trying times. That's why SDG&E offers financial assistance to those that need it most. See if you qualify to receive 30% or more off your monthly energy bill.

Financial assistance for those that need it.

Save 30% or more on your energy bill.

Learn More

Apply, Renew or Verify

Learn More

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SOCIAL MEDIA

ORGANIC SOCIAL ADS

SDG&E Dedicated Organic Social Media Post

Facebook

Impressions: 2,894

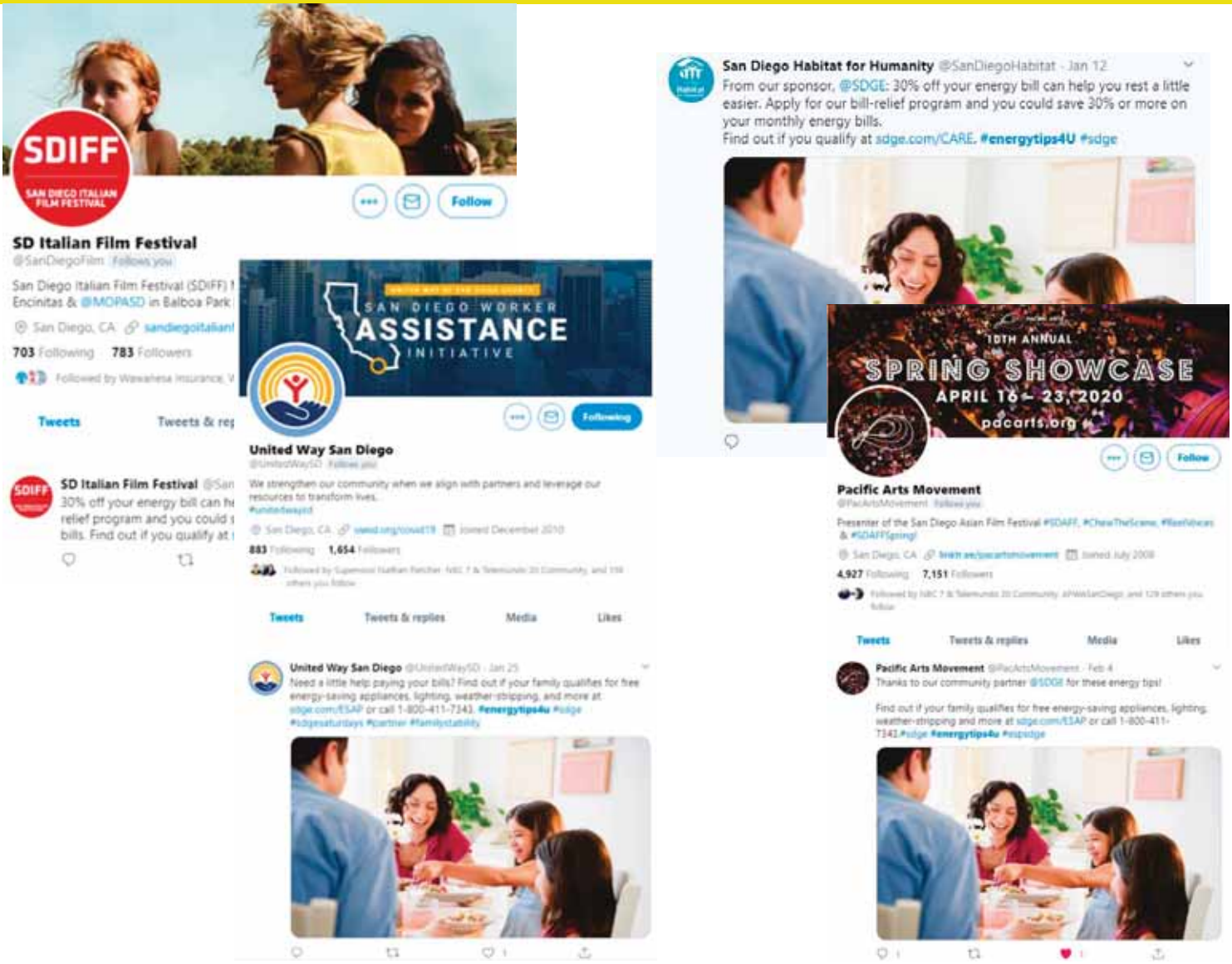
Instagram

Impressions: 22

ORGANIC SOCIAL MEDIA IS A BLEND OF IN-HOUSE POSTS BY SDG&E'S SOCIAL MEDIA TEAM AND MESSAGES POSTED BY OUR COMMUNITY OUTREACH PARTNERS ABOUT HOW RESIDENTS CAN GET ENERGY ASSISTANCE WHEN THEY NEED IT THE MOST.

SOCIAL MEDIA

ORGANIC SOCIAL ADS (CONT,)



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