BEFORE THE PUBLIC UTILITIES COMMISSION
OF THE STATE OF CALIFORNIA

Application of Southern California Edison Company (U 338E) for Approval of its Energy Savings Assistance and California Alternate Rates for Energy Programs and Budgets for Program Years 2015-2017.	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 MAY 2020

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June 22, 2020

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

This is the fifth 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 May 31, 2020 for San Diego Gas & Electric Company (SDG&E).

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

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June 22, 2020

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 May 28, 2020, the Commission approved Resolution E-5074, ratifying the Executive Director's March 23 and April 7 letters that directed the IOUs to offer 60-day advance payments for Energy Savings Assistance (ESA) programs and expands upon certain directives. The Resolution directed the utilities to retroactively amend and re-extend offers to all ESA Program contractors. Among other things, it also approved a Post Pandemic Return to Service (PPRS) credit, adjusted the payback period for contractors who have accepted advances, and established reporting requirements for contractors and IOUs.

On May 29, 2020, SDG&E notified contractors that the ESA Program suspension was lifted. As of the end of May, eight ESA Program contractors accepted advance payments and two contractors declined all offers. Of the eight acceptances, one contractor returned half of the advance and two contractors returned all funds advanced. The five remaining contractors have accepted $907,359 in total funds advanced.

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

ESA Program Summary through May 2020			
	2020 Authorized / Planning Assumptions	**Actual to Date[1]**	**%**
Budget[2]	$35,509,153	7,211,978	20%
Homes Treated[3]	23,761	4,430	19%
kWh Saved	7,220,000	456,016	6%
kW Demand Reduced	3,954	61	2%
Therms Saved	420,000	7,193	2%
GHG Emissions Reduced (Tons)	6,428	293	5%

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

<u>ESA Program Contractor Outreach</u>

SDG&E's Outreach and Assessment (O&A) contractors have been significantly impacted by COVID-19. In May, traditional door-to-door outreach was not conducted; therefore, no leads were created via this method. However, SDG&E program contractors used phone enrollment tactics to virtually enroll customers in

[1] Energy, demand, emissions savings reflects total savings from the ESA Program including California Department of Community Services and Development (CSD) leveraging and multifamily common area measure installations.
[2] Budget authorized in approval of SDG&E Advice Letter 3250-E/2688-G dated December 27, 2018 for program years 2019 and 2020.
[3] Total homes treated reflects homes that have been invoiced and paid and also includes CSD leveraging.

the ESA Program. Contractors will follow-up with in-home visits to complete assessment and install measures for customers once contractors are allowed to resume in-home visits. In May, 61 customers were enrolled through these efforts.

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 May, SDG&E did not receive a list of 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. Due to the suspension of the CARE HEU verification,[4] and the suspension of the ESA Program, no leads have been generated for GRID Alternatives for the month of May.

ESA Program Multifamily Common Area Measure (MF CAM) Initiative

In May 2020, SDG&E's ESA Program MF CAM implementer continued targeted marketing to potential ESA MF CAM properties, including re-syndication projects in SDG&E's service territory. To date, 24 properties have been completed and invoiced and 17 other properties are currently receiving measure

[4] *See* Advice Letter 3526-E-D/2854-G-D, approved June 16, 2020, and effective March 19, 2020.

installations. In addition, there are a total of 14 properties pending energy assessments/audits. There have been minimal COVID-19 related impacts to the ongoing operations of the ESA MF CAM initiative as work can be completed via phone or email and ongoing MF CAM installations can be completed without contractor contact with other people.

Information on the MF CAM initiative, including eligibility requirements, program flow, and contact information for Willdan Energy, SDG&E's implementer, is available on SDG&E's website page at https://www.sdge.com/businesses/savings-center/esa-common-area-measures-program.

Language Line

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

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

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

The intent of the 2020 campaign is to make a connection with customers in order to drive conservation and provide monthly savings on their energy bill. The campaign runs in English, Spanish and Asian languages and includes TV, streaming radio, outdoor, print, digital (including paid search), email, direct mail and bill inserts, as well as a robust outreach program. In response to the pandemic, SDG&E implemented a number of changes to its customer assistance program ME&O efforts which will have an impact on ongoing campaign planning for these programs.[5]

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 May 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 May, the messaging in SDG&E's ads has been updated to focus on those who are recently

[5] *Id.*

unemployed or in need due to the COVID-19 pandemic. The ads now have an overall Customer Assistance message with information on where to get help rather than focusing specifically on CARE or ESA.

Outdoor Advertising

In May, SDG&E added a no-cost digital outdoor board (13' x 46') that will run from May through July 2020. This digital board faces both north and south and receives approximately **139,353** daily impressions on the northbound side of the freeway and **97,379** daily impression on the southbound side. There are two versions of the creative that will run in an equal (50/50) rotation. One creative directs customers to ***sdge.com/assistance*** for additional information about SDG&E customer assistance programs. The second creative directs customers to ***211 San Diego*** for additional information about the LIHEAP program.

Online Advertising:

In 2020, SDG&E planned a digital advertising campaign that began in February and will end in October. Paid Search began running February 2020 and garnered 76,656 impressions in May with a click-through-rate (CTR) of 33.57%. Paid Social for May had 865,417 impressions with a CTR of 1.13%. Streaming Radio provided 346,677 impressions. Banner Display Ads for May had 1,461,511 impressions with a CTR of 0.17%. Native online advertising had 205,933 impressions with a CTR of 0.14%. Due to the COVID-19 pandemic, ESA online

advertising continues to be on hold in lieu of the general assistance campaign that is focused on enrolling customers in CARE or the Family Electric Rate assistance (FERA) program. 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 187 Customer Assistance messages in May to an audience of more than 401,000 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 May 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.[6] 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. During the COVID-19 pandemic, ESA leads have temporarily been suspended since contractors are not currently entering homes. Outbound call activities in May 2020 generated the

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

Footnote continued on next page

following numbers:

The Harris Group	
ESA Leads	0
CARE Enrollments	2843
CARE Recertifications[7]	7

Email:

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

Direct Mail:

SDG&E did not send out ESA Program promotional postcards to potential ESA-eligible customers in May 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

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

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

Energy Solutions Partner Network	
ESA Leads	0
CARE Enrollments	6
CARE Recertifications	0

Partner Spotlight:

This month's events and presentations were mostly canceled due to COVID-19, while some events were created/modified. In May 2020, the SDG&E Customer Solutions Outreach Team participated in 16 events, presentations, and trainings/workshops, three of which were virtual, that featured information and enrollment in energy solutions programs, services and tools. Many of these activities were hosted by SDG&E's partner network and included drive through events, such as food drives, where information was shared in a safe manner. Outreach activities were focused around engaging customers with solutions such as the CARE and ESA Programs and reached over 2,500 people in May.

San Ysidro Heath Centers

On May 22, the San Ysidro Heath Center (SYHC) transitioned 30 seniors to permanent low-income housing. The SDG&E Outreach team worked with SYHC to provide information on various low-income programs and provided virtual training for the program coordinator on CARE, FERA and Medical Baseline (MBL) programs. SDG&E also assembled bags with night lights, CARE applications, and MBL applications to deliver to the residents on their move-in date.

Chula Vista Community Collaborative

On May 21, SDG&E Outreach gave a presentation on customer assistance programs to the Chula Vista Community Collaborative (CVCC). The CVCC draws together all sectors of the local community to develop coordinated strategies and systems that protect the health, safety, and wellness of residents. This Spanish presentation was given to a group of volunteers that work with the community to assist them with resources. CARE, FERA, MBL and COVID-19 response information was presented to the group.

San Diego Food Bank

In May, SDG&E sent 20,000 CARE applications to the San Diego Food Bank who will be providing the information in their food distribution efforts over the next few months.

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 May 2020, SDG&E did not participate in any multicultural outreach events due to the COVID-19 pandemic.

Other Customer Engagement Efforts

Subject to SDG&E COVID-19 pandemic response addressed above in section 1.2.2., SDG&E has several other customer engagement efforts to educate, enroll, and provide direct service to its customers. These efforts include direct service from SDG&E's Customer Contact Center (CCC) and Payment Offices, as well as the distribution of materials through other SDG&E customer-facing groups/programs and field services teams. Updated information as it relates to

ongoing customer engagement and the impacts of the COVID-19 pandemic will continue to be provided in subsequent monthly reports.

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

SDG&E's CCC, Branch Offices, and Payment Offices promote and offer the CARE and ESA Programs to potentially eligible customers. SDG&E also promotes these customer assistance solutions at its Authorized Payment Locations (APLs). Additionally, the Outreach team assists at Branch Office locations on a seasonal basis to help enroll customers. On March 20, SDG&E closed the branch offices to the public over concern of the COVID-19 pandemic. Customers were urged to contact SDG&E's CCC or go online to resolve utility issues.

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

	CCC	Branch Office
ESA Leads	12	2
CARE Enrollments	36	15
CARE Recertifications[8]	0	2

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. LIHEAP contractors are not conducting in-home visits due to COVID-19, but are continuing payment assistance services and lead generation for possible enrollment once certain ESA activities resume. LIHEAP agencies have also received additional payment assistance funding, which would increase the leveraging opportunities between the two programs. In May, LIHEAP organizations generated 216 leads for the ESA Program and enrolled four customers.

As part of SDG&E's leveraging agreement with San Diego County Water Authority (SDCWA), SDCWA reimburses SDG&E for water measures installed

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

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 May.

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 May 2020.

1.5 Miscellaneous

1.5.1 ESA Program Studies

2022 LINA. In May, the study team continued refining the work scope.

NEB Assessment. In May, the study team met twice to discuss the draft and final work plan, which will be distributed to the low-income service list in June.

1.5.2 ESA Program Pilot

SDG&E is not currently conducting any pilots.

2. CARE EXECUTIVE SUMMARY

2.1 CARE Program Summary

COVID-19 Program Impacts

SDG&E participated in Commissioner Shiroma's All Party Meeting on May 22, which provided an opportunity for the Commission and stakeholders to gain a

better understanding of utility efforts to increase CARE education and outreach and to brainstorm additional actions in response to the COVID-19 pandemic. SDG&E's continued efforts to inform recently affected customers about CARE enrollment are detailed below.

2.1.1 Please provide CARE Program summary costs.

CARE Budget Categories	Authorized Budget[9]	Actual Expenses to Date	% of Budget Spent
Outreach	$3,254,171	$900,889	28%
Proc., Certification and Verification	$517,211	$297,715	58%
Post Enrollment Verification	$363,667	$64,462	18%
Information Tech./Programming	$1,719,900	$186,783	11%
Pilots-CHANGES	$267,733	$110,435	41%
Regulatory Compliance	$303,653	$258,633	85%
General Administration	$836,246	$249,312	30%
CPUC Energy Division Staff	$57,852	$36,780	64%
Cooling Centers[10]	$0	$0	0%
Total Expenses	**$7,320,433**	**$2,105,010**	**29%**
Subsidies and Benefits	$74,571,504	$50,805,823	68%
Total Program Costs and Discounts	**$81,891,937**	**$52,910,833**	**65%**

2.1.2 Provide the CARE Program penetration rate to date.

CARE Penetration

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

[10] The funding for SDG&E's Cool Zones is no longer under the CARE program. *See* D.17-12-009 at Ordering Paragraph 114.

Footnote continued on next page

Participants Enrolled	Eligible Participants[11]	Penetration rate
319,874	302,245	106%

2.2 Outreach

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

In May 2020, marketing and outreach efforts generated 9,701 completed CARE applications, and 5,735 new enrollments/recertifications for the program. Below is a summary of CARE specific outreach efforts.

Direct Marketing

Direct Mail

In May 2020, SDG&E continued its rate comparison campaign by mailing a comparison letter to 15,936 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.

[11] 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.

Email

In May 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 May 2020, SDG&E sent out 90,144 emails (many of these reminders) which generated a 40.47% open rate and a 5.30% click through rate over the course of the month.

Community Outreach & Engagement

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

CARE Partners (Capitation Agencies)

SDG&E partners with 19 social service agencies such as the Women's Infant & Children Organization (WIC) program, refugee assimilation organizations, and others to help enroll its hardest-to-reach customers. These organizations serve high-risk, low-income individuals and families with enrollment in state and federally funded assistance programs, including Cal Fresh, LIHEAP, Covered California, and California Lifeline. The partnering organizations are in diverse low-income communities serving multicultural/multilingual, seniors, veterans,

special needs, and LEP audiences and provide multilingual staffing. During the month of May, the following numbers were generated by the Capitation Agencies:

Capitation Agencies	
ESA Leads	147
CARE Enrollments	239
CARE Recertifications[12]	1

Cool Zones

Cool Zones are typically active from May 15 through October 31 of each year. As of May, SDG&E has been in contact with the County of San Diego to determine how to reopen Cool Zones all while keeping within state guidelines. As of May, no Cool Zones have opened. However, over 175 fans were distributed to customers and the County of San Diego had over 200 inquiries about Cool Zones.

Women's Infant & Children Organizations

In May, WIC offices were closed to in-person interactions because of the COVID-19 pandemic. The WIC offices, however, continue 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

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

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

HHSA	May	YTD
ESA Leads	0	0
CARE Enrollments	91	423
CARE Recertifications[13]	1	218

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 May 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 April 2020. There were no Consumer Education Sessions given for the month of April 2020. May 2020 activity for Table 10 and Table 11 will be reported in a subsequent report.[14]

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

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

4. APPENDIX A – ESA AND CARE PROGRAM TABLES

ESA Program - Table 1 - Program Expenses

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

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

ESA Program - Table 2A - Program Expenses & Energy Savings by Measures Installed (CSD Leveraging)

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

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

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

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

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

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

ESA Program - Table 6 - Expenditures for Pilots and Studies

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

CARE Program - Table 1 - CARE Overall Program Expenses

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

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

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

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

CARE Program - Table 5 - Enrollment by County

CARE Program - Table 6 - Recertification Results

CARE Program - Table 7 - Capitation Contractors

CARE Program - Table 8 - Participants as of Month End

CARE Program - Table 9 - Expenditures for the CHANGES Pilot

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

CARE Program - Table 11 - CHANGES Group Customer Assistance Sessions

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

	Authorized Budget [1] [2]			Current Month Expenses			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 [3]	$ 854,260	$ 319,825	$ 1,174,085	$ 13,501	$ 3,512	$ 17,013	$ (51,956)	$ 258,327	$ 206,371	-6%	81%	18%
Domestic Hot Water	$ 65,958	$ 2,132,630	$ 2,198,588	$ 975	$ 31,517	$ 32,491	$ 8,487	$ 274,428	$ 282,915	13%	13%	13%
Enclosure	$ 2,560,350	$ 3,393,952	$ 5,954,302	$ 2,345	$ 3,109	$ 5,454	$ 188,845	$ 250,330	$ 439,175	7%	7%	7%
HVAC	$ 427,358	$ 3,727,353	$ 4,154,711	$ 767	$ 14,488	$ 15,255	$ 52,943	$ 693,531	$ 746,473	12%	19%	18%
Maintenance	$ 7,063	$ 291,617	$ 298,680	$ -	$ 321	$ 321	$ -	$ 22,434	$ 22,434	0%	8%	8%
Lighting [4]	$ 4,642,829	$ -	$ 4,642,829	$ 15,554	$ -	$ 15,554	$ 877,730	$ -	$ 877,730	19%	0%	19%
Miscellaneous	$ 1,775,159	$ -	$ 1,775,159	$ 3,047	$ -	$ 3,047	$ 201,794	$ -	$ 201,794	11%	0%	11%
Customer Enrollment	$ 2,195,740	$ 2,195,740	$ 4,391,481	$ 12,164	$ 12,164	$ 24,327	$ 647,346	$ 647,346	$ 1,294,691	29%	29%	29%
In Home Education	$ 348,433	$ 348,433	$ 696,865	$ 2,168	$ 2,168	$ 4,336	$ 114,896	$ 114,896	$ 229,792	33%	33%	33%
Pilot	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
Energy Efficiency TOTAL	**$ 12,877,149**	**$ 12,409,550**	**$ 25,286,700**	**$ 50,520**	**$ 67,278**	**$ 117,798**	**$ 2,040,085**	**$ 2,261,291**	**$ 4,301,376**	16%	18%	17%
Training Center	$ 249,089	$ 249,089	$ 498,179	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
Inspections	$ 90,210	$ 90,210	$ 180,420	$ 5,712	$ 5,712	$ 11,425	$ 34,748	$ 34,748	$ 69,496	39%	39%	39%
Marketing and Outreach	$ 600,000	$ 600,000	$ 1,200,000	$ 23,022	$ 23,022	$ 46,045	$ 196,758	$ 196,758	$ 393,517	33%	33%	33%
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	$ 23,486	$ 23,486	$ 46,972	$ 141,430	$ 141,429	$ 282,859	84%	84%	84%
General Administration [4]	$ 1,368,601	$ 1,368,601	$ 2,737,202	$ 239,409	$ 239,409	$ 478,819	$ 795,442	$ 795,441	$ 1,590,883	58%	58%	58%
CPUC Energy Division	$ 23,877	$ 23,877	$ 47,754	$ 2,008	$ 2,008	$ 4,015	$ 7,882	$ 7,882	$ 15,763	33%	33%	33%
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**	**$ 344,158**	**$ 360,915**	**$ 705,073**	**$ 3,216,344**	**$ 3,437,549**	**$ 6,653,893**	**20%**	**23%**	**21%**
Funded Outside of ESA Program Budget												
Indirect Costs				$ 39,158	$ 39,247	$ 78,404	$ 208,925	$ 210,139	$ 419,064			
NGAT Costs		$ 288,000	$ 288,000		$ 673	$ 673		$ 30,268	$ 30,268		11%	11%

[1] Authorized budget does not include shifted funds from previous years and/or program cycles. Shifted funds, referred to as "2009-2016 Unspent ESA Program Funds", are reflected in ESA Table 1A.
[2] Reflects the authorized funding approved in the CPUC Energy Division Disposition Letter dated 12/27/2018 approving SDG&E Advice Letter 3250-E/2688-G.
[3] Negative YTD electric amount due to the correction of 2019 expense incorrectly charged to electric and relcassed to gas.
[4] Includes a total of $876,249 for COVID 19 Advanced Payments to the following contractors: THA $86,720; CUI $32,000; Jerry's Heating & Air $107,280; Reliable Energy Mgmnt $33,550; Eagle Systems $205,509; Amer Insulation/Amer Eco $411,190. Advance payment to R&B Wholesale Distribution was returned to SDG&E in the amount of $87,672.

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
May 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	$ 34,838	$ 34,838	$ 69,676	$ 264,340	$ 264,340	$ 528,680	15%	15%	15%
In-Home Education	$ 185,912	$ 185,912	$ 371,824	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
Leveraging - CSD [3]	$ 241,216	$ 241,216	$ 482,431	$ -	$ -	$ -			$ -	0%	0%	0%
Pilot [4] [5]	$ 25,000	$ 25,000	$ 50,000	$ -	$ -	$ -	$ (1,500)	$ (1,500)	$ (3,000)	-6%	-6%	-6%
Studies [6] [7]	$ 30,625	$ 30,625	$ 61,250	$ 942	$ 942	$ 1,884	$ 16,203	$ 16,203	$ 32,405	53%	53%	53%
Regulatory Compliance												
General Administration												
TOTAL PROGRAM BUDGET/EXPENSES	**$ 2,250,253**	**$ 2,250,253**	**$ 4,500,505**	**$ 35,780**	**$ 35,780**	**$ 71,560**	**$ 279,043**	**$ 279,043**	**$ 558,085**	**12%**	**12%**	**12%**

[1] Add additional categories if relevant to your utility
[2] Reflects the authorized funding in D.16-11-022 and updated via Resolution E-4884 addressing conforming Advice Letters 3065-E/2568-G and 3065-E-A/2568-G-A. Budgets updated and approved via AL 3250-E/2688-G.
[3] Refers to budget supporting CSD's LIWP program
[4] Funding authorized for Programmable Communicating Thermostat (PCT) Pilot.
[5] Negative YTD amount is the result of 2019 expense related to thermostats reclassified to Marketing and Outreach (Table 1) in PY2020.
[6] Funding authorized for Rapid Feedback Research and Analysis and Potential and Goals Study.
[7] YTD total includes $30.5K correction of 2019 expense incorrectly charged to General Administration (Table 1) and relcassed to Rapid Feedback Research and Analaysis in PY2020.

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

Energy Savings Assistance Program Table 2
SDG&E
May 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	43	304	0	785	41,028	1.2%	Each	7	185	0	112	$ 6,828	0.6%	Each	36	119	0	673	34,199	1.6%	0 Each						
Refrigerator	Each	169	97,769	12	-	154,798	4.6%	Each	35	22,316	3	-	$ 33,055	2.9%	Each	134	75,453	9	-	$ 121,744	5.8%	0 Each						
Microwave	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	-	0.0%	0 Each						
Domestic Hot Water																												
Other Domestic Hot Water[3]	Home	2,438	7,239	1	7,262	140,419	4.2%	Home	755	2,172	0	2,196	$ 38,008	3.3%	Home	1,683	5,067	1	5,066	$ 102,411	4.9%	0 Home						
Water Heater Tank and Pipe Insulation	Home	124	-	-	112	7,511	0.2%	Home	62	-	-	44	$ 3,805	0.3%	Home	62	-	-	68	$ 3,705	0.2%	0 Home						
Water Heater Repair/Replacement	Home	310	-	-	6,957	169,893	5.1%	Home	101	-	-	2,668	$ 49,113	4.3%	Home	209	-	-	4,289	$ 120,780	5.7%	0 Home						
Combined Showerhead/TSV	Home	5	-	-	31	341	0.0%	Home	-	-	-	-	$ -	0.0%	Home	5	-	-	31	$ 341	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	16	65	0	30	1,685	0.1%	Each	11	65	0	20	$ 1,159	0.1%	Each	5	-	-	10	$ 527	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	1,329	14,352	3	410	419,169	12.6%	Home	369	3,744	1	90	$ 114,520	9.9%	Home	960	10,608	2	320	$ 304,650	14.5%	0 Home						
Caulking	Home	-	-	-	-	-	0.0%	Home	-	-	-	-	-	0.0%	Home	-	-	-	-	-	0.0%	0 Home						
Attic Insulation	Home	14	215	0	490	21,028	0.6%	Home	2	-	-	70	$ 3,499	0.3%	Home	12	215	0	420	$ 17,529	0.8%	0 Home						
HVAC																												
FAU Standing Pilot Conversion	Each	1	-	-	10	341	0.0%	Each	-	-	-	-	$ -	0.0%	Each	1	-	-	10	$ 341	0.0%	0 Each						
Furnace Repair/Replacement	Each	423	-	-	(7,612)	603,754	18.1%	Each	115	-	-	(1,764)	$ 195,734	17.0%	Each	308	-	-	(5,848)	$ 408,020	19.4%	0 Each						
Room A/C Replacement	Each	41	(2,046)	(0)	-	43,018	1.3%	Each	3	(186)	(0)	-	$ 3,865	0.3%	Each	38	(1,860)	(0)	-	$ 39,153	1.9%	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	88	-	-	456	14,932	0.4%	Home	26	-	-	114	4,948	0.4%	Home	62	-	-	342	9,984	0.5%	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	32	4,003	-	211	5,840	0.2%	Home	17	1,427	-	117	$ 3,050	0.3%	Home	15	2,576	-	93	2,790	0.1%	0 Home						
Maintenance																												
Furnace Clean and Tune	Home	408	-	-	(807)	32,925	1.0%	Home	71	-	-	(147)	$ 5,664	0.5%	Home	337	-	-	(660)	$ 27,261	1.3%	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	1,721	7,280	1	(133)	144,495	4.3%	Each	335	1,417	0	(25)	$ 28,127	2.4%	Each	1,386	5,863	1	(108)	$ 116,369	5.5%	0 Each						
Exterior Hard wired LED fixtures	Each	414	2,128	0	-	29,818	0.9%	Each	87	447	0	-	$ 6,265	0.5%	Each	327	1,681	0	-	$ 23,553	1.1%	0 Each						
LED Torchiere	Each	1,513	6,400	1	(116)	139,821	4.2%	Each	447	1,891	0	(34)	$ 41,108	3.6%	Each	1,066	4,509	1	(82)	$ 98,713	4.7%	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	1,273	3,844	0	(64)	20,584	0.6%	Each	618	1,866	0	(29)	$ 9,993	0.9%	Each	655	1,978	0	(35)	$ 10,591	0.5%	0 Each						
New - LED A-Lamps	Each	24,379	51,683	6	(828)	358,371	10.7%	Each	11,794	25,003	3	(354)	$ 173,372	15.1%	Each	12,585	26,680	3	(475)	$ 185,000	8.8%	0 Each						
Miscellaneous																												
Pool Pumps	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	0 Each						
Smart Strip	Each	804	112,560	16	-	48,642	1.5%	Each	521	72,940	10	-	$ 33,421	2.9%	Each	283	39,620	6	-	$ 15,220	0.7%	0 Each						
Smart Strip Tier II	Each	1,073	150,220	21	-	91,403	2.7%	Each	458	64,120	9	-	$ 41,927	3.6%	Each	615	86,100	12	-	$ 49,476	2.3%	0 Each						
Pilots																					0.0%							
Customer Enrollment																												
ESA Outreach & Assessment	Home	4,492				$ 712,601	21.4%	Home	1,961				$ 298,447	25.9%	Home	2,531				$ 414,154	19.7%	0 Home						
ESA In-Home Energy Education	Home	4,492				$ 131,884	4.0%	Home	1,961				$ 55,763	4.8%	Home	2,531				$ 76,120	3.6%	0 Home						
Total Savings/Expenditures			456,016	61	7,193	$ 3,334,303				197,408	27	3,078	$ 1,151,671				249,329	33	3,830	$ 2,105,510				-	-	-	$ -	
Total Households Weatherized [2]		1,334							370							964							-				
Households Treated	Total (K+S)							First Touches							**Re-treated Homes/Go-Backs**							**Aliso Canyon**						
- Single Family Households Treated	Home	1,143						Home	621						Home	522						Home						
- Multi-family Households Treated	Home	2,853						Home	1,085						Home	1,768						Home						
- Mobile Homes Treated	Home	434						Home	230						Home	204						Home						
Total Number of Households Treated	Home	4,430						Home	1,936						Home	2,494						Home						
# Eligible Households to be Treated for PY [3]	Home	23,761						Home	243						Home	23,518						Home						
% of Households Treated	%	19%						%	797%						%	11%						%						
- Master-Meter Households Treated	Home	483						Home	244						Home	239						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 minor

[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
May 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

[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
May 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							
Faucet Aerator	Each	8	184	0	19	$ 60	
Pipe Insulation	Home	3	-	-	26	$ 2,378	
Envelope							
HVAC							
AC Tune-up	Cap-Tons	10	144	0	1	$ 1,186	
Furnace Replacement	Cap-kBTUh	148	-	-	45	$ 2,368	
HEAT Pump Split System	Cap-Tons	10	404	0	(0)	$ 18,526	
HEAT Pump Split System	Each	5	77	0	(0)	$ 8,337	
Programmable Thermostat	Each	4	335	-	19	$ 1,160	
Lighting							

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

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

Standard Notes (do not delete)

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

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

2. Only complete if measure is canceled or discontinued

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

	A	B
1	**Energy Savings Assistance Program Tables 3A-C - Energy Savings and Average Bill Savings per Treated Home/Common Area**	
2	**SDG&E**	
3	**May 2020**	
4		
5	**Table 3A-1, ESA Program**	
6	Annual kWh Savings	456,016
7	Annual Therm Savings	7,193
8	Lifecycle kWh Savings	3,965,387
9	Lifecycle Therm Savings	969
10	Current kWh Rate	$ 0.26
11	Current Therm Rate	$ 1.20
12	Average 1st Year Bill Savings / Treated households	$ 28.67
13	Average Lifecycle Bill Savings / Treated Household	$ 232.53
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	456,016
29	Annual Therm Savings	7,193
30	Lifecycle kWh Savings	3,965,387
31	Lifecycle Therm Savings	969
32	Current kWh Rate	$ 0.26
33	Current Therm Rate	$ 1.20
34	Average 1st Year Bill Savings / Treated Households	$ 28.67
35	Average Lifecycle Bill Savings / Treated Households	$ 232.53
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	296,292
41	Annual Therm Savings	(1,049)
42	Lifecycle kWh Savings	2,937,097
43	Lifecycle Therm Savings	(11,744)
44	Current kWh Rate	$0.26
45	Current Therm Rate	$1.20
46	Average 1st Year Bill Savings / Treated Property	$ 3,988.29
47	Average Lifecycle Bill Savings / Treated Property	$ 39,450.12
48		
49		

	A	B	C	D	E	F	G
1	**Energy Savings Assistance Program Table 4 - Homes/Buildings Treated**						
2	**SDG&E**						
3	**May 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	14,986	**14,986**	0	280	**280**
9	San Diego	6,141	282,825	**288,966**	182	3,968	**4,150**
10	**Total**	**6,141**	**297,811**	**303,952**	**182**	**4,248**	**4,430**
11							
12							
13	**Table 4B, ESA Program - CSD Leveraging**						
14					**Households Treated YTD**		
15	**County**				**Rural**	**Urban**	**Total**
16	Orange						**0**
17	San Diego					0	**0**
18	**Total**				**0**	**0**	**0**
19							
20							
21	**Table 4C, ESA Program - Multifamily Common Area**						
22		*			**Properties Treated YTD**		
23	**County**				**Rural**	**Urban**	**Total**
24	Orange				0	0	**0**
25	San Diego				0	6	**6**
26	**Total**				**0**	**6**	**6**
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

May 2020

ESA Program	Reason Provided						
County	Customer Unwilling/Declined Program Measures	Customer Unavailable - Scheduling Conflicts	Hazardous Environment (unsafe/unclean)	Landlord Refused to Authorize Participation	Household Exceeds Allowable Limits	Unable to Provide Required Documentation	Other Infeasible/ Ineligible
Orange	32	9	0	0	196	0	53
San Diego	1,678	1,117	3	0	4,944	204	71
Total	**1,710**	**1,126**	**3**	**0**	**5,140**	**204**	**124**

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
May 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	12,547	2	0	0	0	0	-	0	397	0	32	19	13	393	12,944	2
February	298	2639	68,573	9	0	0	0	0	70	0	13,798	2	368	203	165	2,639	82,371	11
March	773	3423	123770.19	16.04	0	0	0	0	271	0	47714.42	6.527	1,044	768	276	3,423	171,485	23
April	2698	213.757	162962.92	21.89	0	0	0	0	155	0	8980.48	1.214	2,853	863	1990	214	171,943	23
May	129	524.947	15394.37	1.986	0	0	0	0	4	0	1878.62	0.231	133	83	50	525	17,273	2
June																		
July																		
August																		
September																		
October																		
November																		
December																		
YTD	**3,930**	**7,193**	**383,248**	**51**	**-**	**-**	**-**	**-**	**500**	**-**	**72,768**	**10**	**4,430**	**1,936**	**2,494**	**7,193**	**456,016**	**61**

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	(174)	64,263	12	-	-	-	-	1	-	6,802	2	5	(174)	71,065	14
March	5	(615)	144,491	31	-	-	-	-	1	-	16,209	3	6	(615)	160,700	33
April	8	(259)	64,527	11	-	-	-	-	-	-	-	-	8	(259)	64,527	11
May	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
June																
July																
August																
September																
October																
November																
December									-	-	-	-	-	-	-	-
YTD	**17**	**(1,049)**	**273,281**	**54**	**-**	**-**	**-**	**-**	**2**	**-**	**23,011**	**4**	**19**	**(1,049)**	**296,292**	**58**

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	**May 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 [5]	$ 25,000	$ 25,000	$50,000	$942	$942	$1,884	$16,203	$16,203	$32,405	65%	65%	65%
20													
21													
22													
23	**Total Studies**	**$47,708**	**$47,708**	**$95,416**	**$942**	**$942**	**$1,884**	**$16,203**	**$16,203**	**$32,405**	**34%**	**34%**	**34%**
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] YTD total includes $30.5K correction of 2019 expense incorrectly charged to General Administration (Table 1) and relcassed to Rapid Feedback Research and Analaysis in PY2020.												
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
May 2020

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

7B - Households Receiving In- Home Energy Education Only		
Measures	**Units**	**Households that Only Received Energy Education**
In-Home Education	Home	62

7C - Households for My Energy/My Account Platform		
Opt-Out	**Already Enrolled**	**Opt-In**
3,747	765	289

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	**CARE Table 1 - CARE Program Expenses**												
2	**SDG&E**												
3	**May 2020**												
4		**Authorized Budget [1] [2]**			**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	$ 133,914	$ 16,551	$ 150,465	$ 801,791	$ 99,098	$ 900,889	27%	30%	28%
7	Processing / Certification Re-certification	$ 465,490	$ 51,721	$ 517,211	$ 52,567	$ 6,497	$ 59,064	$ 264,967	$ 32,749	$ 297,715	57%	63%	58%
8	Post Enrollment Verification	$ 327,300	$ 36,367	$ 363,667	$ 10,901	$ 1,347	$ 12,249	$ 57,371	$ 7,091	$ 64,462	18%	19%	18%
9	IT Programming	$ 1,547,910	$ 171,990	$ 1,719,900	$ 13,135	$ 1,623	$ 14,758	$ 166,237	$ 20,546	$ 186,783	11%	12%	11%
10	Cooling Centers [2]			$ -	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
11													
12	Pilots/CHANGES Program [3]	$ 240,960	$ 26,773	$ 267,733	$ 16,269	$ 2,011	$ 18,280	$ 98,287	$ 12,148	$ 110,435	41%	45%	41%
13	Studies [4]	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
14	Regulatory Compliance	$ 273,288	$ 30,365	$ 303,653	$ 35,288	$ 4,361	$ 39,650	$ 230,184	$ 28,450	$ 258,633	84%	94%	85%
15	General Administration	$ 752,622	$ 83,625	$ 836,246	$ 39,823	$ 4,922	$ 44,745	$ 221,888	$ 27,424	$ 249,312	29%	33%	30%
16	CPUC Energy Division	$ 52,067	$ 5,785	$ 57,852	$ 8,338	$ 1,031	$ 9,368	$ 32,735	$ 4,046	$ 36,780	63%	70%	64%
17													
18	**SUBTOTAL MANAGEMENT COSTS**	**$ 6,588,390**	**$ 732,043**	**$ 7,320,433**	**$ 310,236**	**$ 38,344**	**$ 348,579**	**$ 1,873,459**	**$ 231,551**	**$ 2,105,010**	**28%**	**32%**	**29%**
19													
20	CARE Rate Discount	$ 67,114,354	$ 7,457,150	$ 74,571,504	$8,432,388	$1,182,014	**$ 9,614,401**	$42,491,151	$8,314,671	**$ 50,805,823**	63%	111%	68%
21													
22	**TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS**	**$ 73,702,743**	**$ 8,189,194**	**$ 81,891,937**	**$ 8,742,623**	**$ 1,220,357**	**$ 9,962,981**	**$ 44,364,610**	**$ 8,546,223**	**$ 52,910,833**	**60%**	**104%**	**65%**
23													
24	Other CARE Rate Benefits [5]												
25	- DWR Bond Charge Exemption				$628,549		$ 628,549	$3,029,408		$ 3,029,408			
26	- CARE Surcharge Exemption				$769,402	$ 102,263	$ 871,665	$3,708,273	$ 692,462	$ 4,400,735			
27	- California Solar Initiative Exemption				$0		$ -	$0		$ -			
28	- kWh Surcharge Exemption				$36,172		$ 36,172	$183,723		$ 183,723			
29	- Vehicle Grid Integration Exemption				$71,983		$ 71,983	$319,925		$ 319,925			
30	Total Other CARE Rate Benefits				**$ 1,506,105**	**$ 102,263**	**$ 1,608,368**	**$ 7,241,329**	**$ 692,462**	**$ 7,933,791**			
31													
32	Indirect Costs				$ 64,696	$ 7,996	**$ 72,692**	$ 318,498	$ 39,365	**$ 357,863**			
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] Removed budget of $43,935 as Cool Center expense are now captured under O&M expense activity.												
36	[3] Decision 15-12-047 transitioned CHANGES pilot to CHANGES program and funding for the effort is captured herein.												
37	[4] Reflects the Annual Eligibility Estimates prepared by Athens Research on behalf of the utilities. This effort was formerly referenced as Measurement and Evaluation.												
38	[5] YTD Electric amounts have been updated to reflect a January calculation error discovered after January close.												
39													
40	**NOTE: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.**												
41													
43													

CARE Table 2 - Enrollment, Recertification, Attrition, & Penetration[5]
SDG&E
May 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	5,033	1,304	342	236	6,915	7,155	3,861	3,544	4,003	11,408	1,363	66	167	6,339	7,935	18,563	-780	300,720	302,245	99%
February	0	146	0	146	5,274	996	244	241	6,755	6,901	1,911	2,830	4,068	8,809	1,607	76	151	2,339	4,173	15,710	2,728	303,448	302,245	100%
March	0	78	0	78	7,603	1,403	635	243	9,884	9,962	2,063	2,390	2,288	6,741	57	6	39	3,925	4,027	16,703	5,935	309,383	302,245	102%
April	0	36	0	36	7,036	1,232	738	230	9,236	9,272	219	664	0	883	481	8	9	2,630	3,128	10,155	6,144	315,527	302,245	104%
May	17	4	0	21	4,736	1,053	813	158	6,760	6,781	13	583	0	596	0	0	0	2,434	2,434	7,377	4,347	319,874	302,245	106%
June																								
July																								
August																								
September																								
October																								
November																								
December																								
YTD Total	**86**	**435**	**0**	**521**	**29,682**	**5,988**	**2,772**	**1,108**	**39,550**	**40,071**	**8,067**	**10,011**	**10,359**	**28,437**	**3,508**	**156**	**366**	**17,667**	**21,697**	**68,508**	**18,374**	**319,874**	**302,245**	**106%**

[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
May 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%	8	53	61	3.6%	0.0%
February	303,448	1,213	0.4%	3	11	14	1.2%	0.0%
March	309,383	1,332	0.4%	0	0	0	0.0%	0.0%
April	315,527	2	0.0%	0	0	0	0.0%	0.0%
May	319,874	0	0.0%	0	0	0	0.0%	0.0%
June	0					0	0.0%	0.0%
July	0					0	0.0%	0.0%
August	0					0	0.0%	0.0%
September	0					0	0.0%	0.0%
October	0					0	0.0%	0.0%
November	0					0	0.0%	0.0%
December	0					0	0.0%	0.0%
YTD Total	**319,874**	**4,230**	**1.3%**	**11**	**64**	**75**	**1.8%**	**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
May 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%	42	14	56	9.8%	0.0%
February	303,448	920	0.3%	2	1	3	0.3%	0.0%
March	309,383	517	0.2%	0	0	0	0.0%	0.0%
April	315,527	600	0.2%	0	0	0	0.0%	0.0%
May	319,874	573	0.2%	0	0	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	**319,874**	**3,180**	**1.0%**	**44**	**15**	**59**	**1.9%**	**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	**May 2020**						
4		**Provided**	**Received**	**Approved**	**Denied**	**Pending/Never Completed**	**Duplicates**
5	Total (Y-T-D)	2,593	78,328	38,232	11,380	445	28,271
6	Percentage		100%	49%	15%	1%	36%
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
May 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	13,762	0	13,762	92%	NA	92%
San Diego	281,284	6,053	287,337	299,267	6,845	306,112	106%	113%	107%
Total	**296,192**	**6,053**	**302,245**	**313,029**	**6,845**	**319,874**	**106%**	**113%**	**106%**

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
May 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	5,863	1.9%	2,075	169	35.4%	0.1%
February	303,448	5,532	1.8%	1,122	36	20.3%	0.0%
March	309,383	5,144	1.7%	299	2	5.8%	0.0%
April	315,527	604	0.2%	0	0	0.0%	0.0%
May	319,874	575	0.2%	0	0	0.0%	0.0%
June							
July							
August							
September							
October							
November							
December							
YTD	**319,874**	**17,718**	**5.5%**	**3,496**	**207**	**19.7%**	**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

	A	B	C	D	E	F	G
1	**CARE Table 7 - Capitation Contractors[1]**						
2	**SDG&E**						
3	**May 2020**						
4	**Contractor**	**Contractor Type (Check one or more if applicable)**				**Total Enrollments**	
5							
6		**Private**	**CBO**	**WMDVBE**	**LIHEAP**	**Current Month**	**Year-to-Date**
7	211 SAN DIEGO		X			116	754
8	211 ORANGE COUNTY		X			-	-
9	AMERICAN RED CROSS WIC OFFICES		X	X		-	-
10	CATHOLIC CHARITIES		X			-	3
11	CHULA VISTA COMMUNITY COLLABORATIVE		X			-	0
12	COMMUNITY RESOURCE CENTER		X			1	5
13	HEARTS AND HANDS WORKING TOGETHER		X			-	6
14	HOME START		X			-	-
15	HORN OF AFRICA		X			-	-
16	INTERFAITH COMMUNITY SERVICES		X			-	-
17	LA MAESTRA FAMILY CLINIC		X		X	-	0
18	MAAC PROJECT		X			-	-
19	NEIGHBORHOOD HEALTH CARE	X				-	14
20	NORTH COUNTY HEALTH SERVICES		X			-	2
21	SAN DIEGO STATE UNIVERSITY WIC OFFICES		X			-	3
22	SAN YSIDRO HEALTH CENTERS		X			-	4
23	SCRIPPS HEALTH WIC		X			-	7
24	UNION OF PAN ASIAN COMMUNITIES SAN DIEGO(UPAC)		X			-	1
25	VISTA COMMUNITY CLINIC		X			-	-
26	**Total Enrollments**					**117**	**799**
27							
28	[1] All capitation contractors with current contracts are listed regardless of whether they have signed up customers or submitted invoices this year.						
29	Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.						
30							
31							
32							

CARE Table 8 - Households as of Month-End
SDG&E
May 2020

Month	Gas and Electric	Gas Only	Electric Only	Total	Eligible Households[1]	Penetration	% Change	Total Residential Accounts[2]
January	189,128	0	113,258	302,386	302,245	100%	0.2%	1,346,953
February	189,798	0	113,650	303,448	302,245	100%	0.2%	1,348,845
March	193,854	0	115,529	309,383	302,245	102%	0.2%	1,350,562
April	197,845	0	117,682	315,527	302,245	104%	0.2%	1,351,487
May	200,816	0	119,058	319,874	302,245	106%	0.2%	1,352,573
June								
July								
August								
September								
October								
November								
December								
YTD	**200,816**	**N/A**	**119,058**	**319,874**	**302,245**	**106%**	**0.2%**	**1,352,573**

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.

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

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

2020	Authorized 2020 Budget Total	Current Month Expenses Total	Expenses Since Jan. 1, 2020 Total	% of 2020 Budget Expensed Total
CHANGES Program	$ 267,733	$ 18,280	$ 110,435	41%
Total	**$ 267,733**	**$ 18,280**	**$ 110,435**	**41%**

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 April 2020[1]	
No. of attendees at education sessions	**0**
Disputes	
Add Level Pay Plan	0
Assisted with CARE Re-Certification/Audit	1
Changed 3rd party Company/Gas Aggregation	0
Changed 3rd Party Electricity Aggregation	0
Enroll in Energy Assistance Programs	0
High Energy CARE User	0
Medical Baseline Application	0
Payment Extension	0
Payment Plan	0
Request Bill Adjustment	3
Request Customer Service Visit	0
Request Meter Service or Testing	0
Schedule Energy Audit	0
Solar	0
Stop Disconnection	0
Time of Use	0
Wildfire Related Issue	0
Total disputes [3]	**4**

Needs Assistance	
Add/Remove Level Pay Plan	0
CARE Enrollment	1
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/LiHEAP	0
Medical Baseline	0
Neighbor to Neighbor	56
REACH	0
Reported Safety Problem	0
Reported Scam	0
Set Up 3rd Party Notification	0
Set Up New Account	0
Payment Extension	1
Payment Plan	2
Wildfire Related Issue	0
Total Needs Assistance [2]	**60**

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

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

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

April 2020 [1,2]

Date[3]	Session Language	Description of Service Provided (e.g. utility bill assistance, utility bill dispute resolution, and other energy related issues)	Session Logistics			
			# of Sessions	Length (Hours)[4]	Number of Attendees	Description of Information / Literature Provided
N/A		Avoiding Disconnection	0	N/A	0	CHANGES Ed Handout
N/A		CARE/FERA and Other Assistance Programs	0	N/A	0	CHANGES Ed Handout
N/A		Electric and Natural Gas Safety	0	N/A	0	CHANGES Ed Handout
N/A		Energy Conservation	0	N/A	0	CHANGES Ed Handout
N/A		Gas Aggregation	0	N/A	0	CHANGES Ed Handout
N/A		High Energy Use	0	N/A	0	CHANGES Ed Handout
N/A		Level Pay Plan	0	N/A	0	CHANGES Ed Handout
N/A		Understanding Your Bill	0	N/A	0	CHANGES Ed Handout
Month Total			0		0	
Year-to-Date			360		1722	

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

[2] As of August 1st, 2019, CHANGES one-on-one data reports have moved from quarterly to monthly for the program year. The data for May 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.