

**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)

And Related Matters.

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

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

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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 October 30, SDG&E notified its contractors and Energy Division that the Post Pandemic Return to Service (PPRS) credit earning period would begin on December 1, 2020 and end on May 31, 2021.¹ SDG&E has five contractors who accepted advance payments and are eligible to earn PPRS credit.

In October, SDG&E Outreach and Assessment (O&A) contractors continue to provide in-home enrollments and treatments. Contractors have reported steadily increasing enrollment numbers and improvements of in-person enrollment activities in October. Contractors continue to offer phone enrollment as an option and follow-up with customers to schedule follow-up appointments for in-home visits.

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

ESA Program Summary through October 2020

¹ See Resolution E-5074 at 10 which states “[T]he IOUs should provide a 30 day advance notice to contractors of when the six-month PPRS credit-earning period begins.” The IOUs consist of Pacific Gas and Electric Company, SDG&E, Southern California Gas Company, and Southern California Edison Company.

	2020 Authorized / Planning Assumptions	Actual to Date²	%
Budget ³	\$35,509,153	\$12,286,651	35%
Homes Treated ⁴	23,761	7,028	30%
kWh Saved	7,220,000	770,053	11%
kW Demand Reduced	3,954	103	3%
Therms Saved	420,000	21,112	5%
GHG Emissions Reduced (Tons)	6,428	547	9%

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

ESA Program Contractor Outreach

In October, SDG&E's largest O&A contractor ramped-up canvassing activities to full-capacity, which is improving enrollment activities. Canvassing has traditionally had the greatest impact on program enrollment efforts and full resumption of this activity is vital for reaching program goals. In October, 466 enrollments were received through canvassing efforts. Contractors are also

² 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.

³ Budget authorized in approval of SDG&E Advice Letter 3250-E/2688-G dated December 27, 2018 for program years 2019 and 2020.

⁴ Total homes treated reflects homes that have been invoiced and paid and also includes CSD leveraging.

continuing to leverage SDG&E marketing efforts to make initial telephone contacts with customers to both enroll and schedule in-home appointments. Contractors were able to successfully enroll 994 customers in October.⁵

ESA Program Multifamily Common Area Measure (MF CAM) Initiative

In October 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, 43 properties have been treated in 2020 and 17 properties are currently receiving measure installations. In addition, there are a total of 8 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 telephone 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>.

⁵ Enrollments are based on date of enrollment and may not be represented in the monthly reporting tables.

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 October, five customers were served by the Language Line.

Language	Calls
Arabic	3
Cantonese	1
Tagalog	1
TOTAL	5

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 television, streaming radio, outdoor, print, digital (including paid search), email, direct mail and bill inserts, as well as a robust outreach program. In response to the COVID-19 pandemic, SDG&E implemented a number of changes to its customer

assistance program ME&O efforts which will have an impact on ongoing campaign planning for these programs.

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 October 2020 are summarized in the following sections:

Streaming TV

In October, SDG&E ran 15 second TV spots on both English and Spanish streaming websites. The 15 second creative is the same as SDG&E's general market television creative that ran earlier in the year.

Print Advertising

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

Online Advertising

In 2020, SDG&E planned a digital advertising campaign that began in February and will end in December. Paid Search began running February 2020 and garnered 72,459 impressions in October with a click-through-rate (CTR) of 29 percent (%). Paid Social media for October had 1,571,390 impressions with a CTR of 1%. Banner Display Ads for October had 5,713,920 impressions with a CTR of 0.38%. Native online advertising had 601,161 impressions with a CTR of 0.16%. ESA-specific online advertising, which had been on hold due to the COVID-19 pandemic continued in October. CARE-specific online advertising commenced in March and will continue through December. The ESA Program leverages customer leads from the CARE online enrollment process.

Social Media

Using e-newsletters, website posts, and social media channels, the Energy Solutions Partner Network shared 144 customer assistance messages in October to an audience of more than 222,000 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.



Casa Familiar @CasaFamiliar · Oct 13

Save 30% or more every month on your energy bill. Find out if you qualify at sdge.com/CARE. #sdge #energytips4u



Alzheimer's San Diego @AlzheimersSD · Oct 13

#PSA from @SDGE to stay cool during heat waves: find your nearest "Cool Zone" at sdge.com/coolzones. #energytips4u



Direct Marketing

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

Direct Mail

SDG&E continued direct mail efforts and sent 10,798 postcards to promote the ESA Program to potential customers.

Email

SDG&E planned an October e-mail to promote the ESA Program to potential customers, which was put on hold to focus on Public Safety Power Shutoff (PSPS) related messaging due to multiple events in SDG&E's region. Therefore, SDG&E did not send any ESA emails in October.

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 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 October 2020 generated the following numbers:

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

The Harris Group	
ESA Leads	0
CARE Enrollments	1,460
CARE Recertifications ⁷	1

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

⁷ Since March 4, no customers are required to recertify, and SDG&E has not removed any customers from the CARE program resulting from recertification. Customers can manually request to recertify but are automatically placed in the COVID protection category.

Energy Solutions Partner Network	
ESA Leads	0
CARE Enrollments	2
CARE Recertifications ⁸	0

Partner Spotlight

In October 2020, the SDG&E Customer Solutions Outreach Team participated in 29 events, presentations, and trainings/workshops, 17 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 on engaging customers with solutions such as the CARE and ESA Programs and reached over 829 people in October.

Energy Solutions Partner Virtual Presentations

Partner Virtual Presentations

On October 21, the Outreach Team held SDG&E’s fourth Residential Programs webinar in 2020 for the Energy Solutions Partners within SDG&E’s service territory. The presentation provided information regarding low-income programs such as CARE, Family Electric Rate Assistance (FERA), and ESA as well as other programs that help

⁸ Since March 4, no customers are required to recertify, and SDG&E has not removed any customers from the CARE program resulting from recertification.

customers with energy conservation and savings. These seminars are well received from the partners who participate.

The Dayle McIntosh Center

On October 28, SDG&E Outreach presented to The Dayle McIntosh Center for the Disabled (Center), a new Energy Solutions Partner located in Orange County. The Center provides services to people with disabilities and facilitates equal access and inclusion within the community. The presentation was given to organization staff and focused on energy efficiency, customer assistance programs, PSPS, and SDG&E's COVID-19 response.

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

Other Customer Engagement Efforts

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

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

SDG&E's CCC, Branch Offices, and Payment Offices promote and offer the CARE and ESA Programs to potentially eligible customers. SDG&E also promotes these customer assistance solutions at its Authorized Payment Locations (APLs). Additionally, the Outreach team assists at Branch Office locations on a seasonal basis to help enroll customers. On March 20, SDG&E closed the branch offices to the public over concern of the COVID-19 pandemic. Branch offices are still accepting CARE applications at the building drop box. 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 October 2020, SDG&E’s CCC and Branch Office generated the following applications and leads over the telephone:

	CCC	Branch Office
ESA Leads	3	4
CARE Enrollments	9	1
CARE Recertifications	0	0

1.3 Leveraging Success Evaluation, Including CSD

Single-Family Affordable Solar Housing (SASH) Program

SDG&E works with GRID Alternatives to enroll customers in the ESA Program based on participation in the SASH Program. Once approved, contractors install all feasible ESA Program measures in the home prior to the SASH Program’s installation of a solar system. SDG&E and GRID have transitioned to a bi-annual process for this activity, therefore there was no activity for this leveraging effort in October. Through October, SDG&E has enrolled 11 customers through SASH leveraging efforts.

Additionally, SDG&E provided GRID with a draft Non-Disclosure Agreement (NDA) for additional data sharing efforts to be conducted for the DAC-SASH program. Once the NDA is finalized, SDG&E will discuss additional data sharing efforts.

Furthermore, 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 a moratorium on CARE HEU during the COVID-19 pandemic, there were two leads generated and provided to GRID Alternatives during the month of October.

As part of SDG&E's leveraging agreement with San Diego County Water Authority (SDCWA), SDCWA reimburses SDG&E for water measures installed as part of the ESA Program in homes where customers have an active SDCWA account. This agreement will continue until December 31, 2020 or until SDCWA's funds are exhausted. In October, SDG&E did not submit any invoices to SDCWA for water saving measures.

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. Both San Diego LIHEAP contractors have resumed enrollment efforts. LIHEAP agencies have also received additional payment assistance funding, which is expected to increase the leveraging opportunities between the two programs. In October, LIHEAP organizations generated 73 leads for the ESA Program and enrolled 45 customers.

1.4 Workforce Education & Training (WE&T)

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

SDG&E did not conduct any training in conjunction with WE&T efforts in October 2020.

1.5 Miscellaneous

1.5.1 ESA Program Studies

2022 Low Income Needs Assessment (LINA) Study

Southern California Edison Company (SCE) is managing the contract for the next statewide LINA study. In October, the study team reviewed and scored the seven proposals received in September 2020. In addition, SCE began contract negotiations with the study team's selected bidder.

Non Energy Benefits (NEB) Assessment

The study team continued to meet during October to discuss Apprise's recommended changes to the NEB calculations and allocation method, along with reviewing the draft model for estimating the NEBs.

1.5.2 ESA Program Pilot

SDG&E is not currently conducting any pilots.

2. CARE EXECUTIVE SUMMARY

2.1 CARE Program Summary

2.1.1 Please provide CARE Program summary costs.

CARE Budget Categories	Authorized Budget ⁹	Actual Expenses to Date	% of Budget Spent
Outreach	\$3,254,171	\$2,165,730	67%
Proc., Certification and Verification	\$517,211	\$509,079	98%
Post Enrollment Verification	\$363,667	\$124,258	34%
Information Tech./Programming	\$1,719,900	\$606,174	35%
Pilots-CHANGES	\$267,733	\$210,112	78%
Regulatory Compliance	\$303,653	\$449,804	148%
General Administration	\$836,246	\$454,138	54%
CPUC Energy Division Staff	\$57,852	\$80,055	138%
Cooling Centers ¹⁰	\$0	\$(42,048)	0%
Total Expenses	\$7,320,433	\$4,557,302	62%
Subsidies and Benefits ¹¹	\$122,423,531	\$115,693,955	95%
Total Program Costs and Discounts	\$129,743,964	\$120,251,257	93%

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. The \$(42,048) represents 2019 Cooling Centers expenses charged to the CARE program in 2019 and correctly removed in 2020 per D.17-12-009.

¹¹ Reflects Subsidies and Benefits as authorized in Advice Letter 3440-E and Advice Letter 2815-G, effective January 1, 2020.

2.1.2 Provide the CARE Program penetration rate to date.

CARE Penetration		
Participants Enrolled	Eligible Participants¹²	Penetration Rate
332,453	302,245	110%

2.2 Outreach

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

In October 2020, marketing and outreach efforts generated 3,411 completed CARE applications and 2,210 new enrollments/recertifications for the program.

Below is a summary of CARE specific outreach efforts.

Direct Marketing

Direct Mail

In October 2020, SDG&E continued the bill comparison campaign by mailing a comparison letter to 5,510 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 30% or more off their energy bill.

Customers are encouraged to call SDG&E's toll-free enrollment number or to apply through SDG&E's online application.

¹² 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 October 2020, SDG&E continued with its Bill 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 October 2020, SDG&E sent out 182,557 emails (many of these reminders) which generated a 23% open rate and a 3% click through rate over the course of the month.

Community Outreach & Engagement

Community outreach and 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 October, the following numbers were generated by the Capitation Agencies:

Capitation Agencies	
ESA Leads	90
CARE Enrollments	152
CARE Recertifications ¹³	0

Cool Zones

The San Diego County Cool Zone program ended the 2020 season on October 31. This year, due to the COVID-19 pandemic, there were changes to the Cool Zones program. On June 15, a limited number of sites opened with modifications to protect the health of the public. The Cool Zone sites were opened to the public and included nine participating locations such as libraries, community centers, and senior centers. For the four months they were open, San Diego County received 840 calls and distributed 507 electric fans to qualified customers. A CARE application was also sent with each fan that was mailed.

¹³ Since March 4, no customers are required to recertify, and SDG&E has not removed any customers from the CARE program resulting from recertification. Customers can manually request to recertify but are automatically placed in COVID protection category.

Women’s Infant & Children Organizations

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

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 October 2020, the following applications were received:

HHSA	October	YTD
ESA Leads	0	0
CARE Enrollments	51	915
CARE Recertifications ¹⁴	7	336

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 October 2020, SDG&E did not receive any customer complaints regarding CARE recertification.

¹⁴ Since March 4, no customers are required to recertify, and SDG&E has not removed any customers from the CARE program resulting from recertification. Customers can manually request to recertify but are automatically placed in the COVID protection category.

3. CHANGES REPORTING

In compliance with requirements outlined in D.12-12-011, SDG&E has updated CARE Table 10 information for the month of September 2020. As of June 1st, 2020, CARE Table 11 reports have moved from monthly to quarterly for the 2020-2021 CHANGES Program contract year. Accordingly, activity for Q2 September-November CARE Table 11 data will be reported in a subsequent report.¹⁵

¹⁵ 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
October 2020**

ESA Program:	Authorized Budget [1] [2]			Current Month Expenses [4]			Year to Date Expenses			% of Budget Spent YTD		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Energy Efficiency												
Appliances	\$ 854,260	\$ 319,825	\$ 1,174,085	\$ 55,936	\$ 44,212	\$ 100,149	\$ 81,812	\$ 320,258	\$ 402,070	10%	100%	34%
Domestic Hot Water	\$ 65,958	\$ 2,132,630	\$ 2,198,588	\$ 1,759	\$ 56,881	\$ 58,640	\$ 19,256	\$ 622,622	\$ 641,878	29%	29%	29%
Enclosure	\$ 2,560,350	\$ 3,393,952	\$ 5,954,302	\$ 17,920	\$ 23,755	\$ 41,675	\$ 384,476	\$ 509,654	\$ 894,129	15%	15%	15%
HVAC	\$ 427,358	\$ 3,727,353	\$ 4,154,711	\$ 4,588	\$ 54,229	\$ 58,817	\$ 74,914	\$ 1,119,585	\$ 1,194,499	18%	30%	29%
Maintenance	\$ 7,063	\$ 291,617	\$ 298,680	\$ -	\$ 7,111	\$ 7,111	\$ -	\$ 60,743	\$ 60,743	0%	21%	20%
Lighting	\$ 4,642,829	\$ -	\$ 4,642,829	\$ 85,698	\$ -	\$ 85,698	\$ 1,479,124	\$ -	\$ 1,479,124	32%	0%	32%
Miscellaneous	\$ 1,775,159	\$ -	\$ 1,775,159	\$ 4,486	\$ -	\$ 4,486	\$ 297,183	\$ -	\$ 297,183	17%	0%	17%
Customer Enrollment	\$ 2,195,740	\$ 2,195,740	\$ 4,391,481	\$ 53,787	\$ 53,787	\$ 107,574	\$ 957,673	\$ 957,673	\$ 1,915,346	44%	44%	44%
In Home Education	\$ 348,433	\$ 348,433	\$ 696,865	\$ 8,622	\$ 8,622	\$ 17,244	\$ 173,822	\$ 173,822	\$ 347,644	50%	50%	50%
Pilot	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Energy Efficiency TOTAL [3]	\$ 12,877,149	\$ 12,409,550	\$ 25,286,700	\$ 232,797	\$ 248,597	\$ 481,394	\$ 3,468,259	\$ 3,764,356	\$ 7,232,616	27%	30%	29%
Training Center	\$ 249,089	\$ 249,089	\$ 498,179	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Inspections	\$ 90,210	\$ 90,210	\$ 180,420	\$ 7,164	\$ 7,164	\$ 14,327	\$ 65,633	\$ 65,633	\$ 131,266	73%	73%	73%
Marketing and Outreach	\$ 600,000	\$ 600,000	\$ 1,200,000	\$ 39,357	\$ 39,357	\$ 78,714	\$ 522,680	\$ 522,679	\$ 1,045,359	87%	87%	87%
Statewide Marketing Education and Outreach	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Studies	\$ 17,083	\$ 17,083	\$ 34,166	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Regulatory Compliance [4]	\$ 168,266	\$ 168,266	\$ 336,532	\$ 64,894	\$ 64,894	\$ 129,788	\$ 240,199	\$ 240,198	\$ 480,397	143%	143%	143%
General Administration [5]	\$ 1,368,601	\$ 1,368,601	\$ 2,737,202	\$ 54,069	\$ 54,069	\$ 108,139	\$ 1,076,971	\$ 1,076,971	\$ 2,153,942	79%	79%	79%
CPUC Energy Division	\$ 23,877	\$ 23,877	\$ 47,754	\$ 1,084	\$ 1,084	\$ 2,168	\$ 17,155	\$ 17,155	\$ 34,309	72%	72%	72%
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	\$ 399,365	\$ 415,165	\$ 814,530	\$ 5,390,897	\$ 5,686,992	\$ 11,077,889	34%	37%	36%
Funded Outside of ESA Program Budget												
Indirect Costs				\$ 42,693	\$ 42,776	\$ 85,469	\$ 416,944	\$ 390,406	\$ 807,350			
NGAT Costs		\$ 288,000	\$ 288,000		\$ 2,482	\$ 2,482		\$ 70,350	\$ 70,350		24%	24%

[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 August accruals and/or re-accruals of \$514,391 in the following reporting categories: Appliances \$0; Domestic Hot Water \$41,789; Enclosure \$70,665; HVAC \$64,641;

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

[5] Includes a total of \$907,821 for COVID 19 Advanced Payments to the following contractors: CUI \$32,000; Jerry's Heating & Air \$54,002; RHA \$205,120; Eagle Systems \$205,509; Amer Insulation/Amer Eco \$411,190. A total of \$261,220 was returned from the following contractors: \$86,720 THA; \$53,278 Jerry's Heating & Air; \$87,672 R&B Wholesale Distribution; \$33,550 Reliable Energy Mgmt. Negative amounts are due to the return of advance payment from THA.

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
October 2020

ESA Program [1]:	Authorized Budget [2]			Current Month Expenses			Year to Date Expenses			% of Budget Spent YTD		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Energy Efficiency												
Multi-Family Common Area Measures	\$ 1,767,500	\$ 1,767,500	\$ 3,535,000	\$ 56,029	\$ 56,029	\$ 112,057	\$ 888,914	\$ 213,091	\$ 1,102,005	50%	12%	31%
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]	\$ 25,000	\$ 25,000	\$ 50,000	\$ 19,783	\$ 19,783	\$ 39,565	\$ 18,283	\$ 18,283	\$ 36,565	73%	73%	73%
Studies [5] [6]	\$ 30,625	\$ 30,625	\$ 61,250	\$ 8,043	\$ 8,043	\$ 16,086	\$ 35,096	\$ 35,096	\$ 70,192	115%	115%	115%
Regulatory Compliance												
General Administration												
TOTAL PROGRAM BUDGET/EXPENSES	\$ 2,250,253	\$ 2,250,253	\$ 4,500,505	\$ 83,854	\$ 83,854	\$ 167,709	\$ 942,292	\$ 266,470	\$ 1,208,762	42%	12%	27%

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

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

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

Energy Savings Assistance Program Table 2

SDG&E

October 2020

Energy Savings Assistance Program Table 2																													
SDG&E																													
October 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]								
Measures	Units	Year-To-Date Completed & Expensed Installation					% of Expenditure	Units	Year-To-Date Completed & Expensed Installation					% of Expenditure	Units	Year-To-Date Completed & Expensed Installation					% of Expenditure	Units	Year-To-Date Completed & Expensed Installation					% of Expenditure	
		Quantity Installed (K+S)	kWh [4] (Annual) (L+T)	kW [4] (Annual) (M+U)	Therms [4] (Annual) (N+V)	Expenses (\$) [7] (O+W)			Quantity Installed	kWh[4] (Annual)	kW[4] (Annual)	Therms[4] (Annual)	Expenses (\$)			Quantity Installed	kWh[4] (Annual)	kW[4] (Annual)	Therms[4] (Annual)	Expenses (\$)			Quantity Installed	kWh[4] (Annual)	kW[4] (Annual)	Therms[4] (Annual)	Expenses (\$)		
Appliances																													
High Efficiency Clothes Washer	Each	86	674	0	1,556	82,486	1.4%	Each	21	370	0	360	\$ 20,485	0.9%	Each	65	304	0	1,196	\$ 62,001	1.7%	Each							
Refrigerator	Each	314	181,201	22	-	289,436	4.8%	Each	96	58,356	7	-	\$ 91,843	4.0%	Each	218	122,845	15	-	\$ 197,593	5.4%	Each							
Microwave	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	-	-	Each							
Domestic Hot Water																													
Other Domestic Hot Water[3]	Home	3,963	14,907	2	11,856	250,118	4.2%	Home	1,360	5,344	1	4,017	\$ 80,582	3.5%	Home	2,603	9,563	1	7,839	\$ 169,536	4.6%	Home							
Water Heater Tank and Pipe Insulation	Home	224	-	-	160	12,925	0.2%	Home	119	-	-	72	\$ 6,772	0.3%	Home	105	-	-	88	\$ 6,153	0.2%	Home							
Water Heater Repair/Replacement	Home	797	-	-	21,382	457,599	7.6%	Home	332	-	-	9,698	\$ 160,276	6.9%	Home	465	-	-	11,684	\$ 297,322	8.1%	Home							
Combined Showerhead/TSV	Home	5	-	-	31	341	0.0%	Home	-	-	-	-	-	0.0%	Home	5	-	-	31	\$ 341	0.0%	Home							
New - Heat Pump Water Heater	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	-	-	Each							
New - Tub Diverter/ Tub Spout	Each	33	65	0	64	3,476	0.1%	Each	19	65	0	36	\$ 2,001	0.1%	Each	14	-	-	28	\$ 1,474	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%	Each							
Enclosure[1]																													
Air Sealing	Home	2,579	34,528	7	992	848,017	14.1%	Home	845	14,872	3	360	\$ 299,008	12.9%	Home	1,734	19,656	4	632	\$ 549,009	14.9%	Home							
Caulking	Home	-	-	-	-	-	0.0%	Home	-	-	-	-	-	0.0%	Home	-	-	-	-	-	-	Home							
Attic Insulation	Home	36	1,565	0	1,190	47,208	0.8%	Home	16	645	0	560	\$ 20,595	0.9%	Home	20	920	0	630	\$ 26,613	0.7%	Home							
HVAC																													
FAU Standing Pilot Conversion	Each	2	-	-	20	681	0.0%	Each	1	-	-	10	\$ 341	0.0%	Each	1	-	-	10	\$ 341	0.0%	Each							
Furnace Repair/Replacement	Each	900	-	-	(13,715)	1,016,310	16.9%	Each	329	-	-	(4,911)	\$ 355,653	15.3%	Each	571	-	-	(9,224)	\$ 660,656	17.9%	Each							
Room A/C Replacement	Each	47	(2,232)	(0)	-	48,734	0.8%	Each	1	-	-	-	\$ 689	0.0%	Each	46	(2,232)	(0)	-	\$ 48,045	1.3%	Each							
Central A/C replacement	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	-	-	Each							
Heat Pump Replacement	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	-	-	Each							
Evaporative Cooler (Replacement)	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	-	-	Each							
Evaporative Cooler (Installation)	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	-	-	Each							
Duct Test and Seal	Home	153	-	-	810	24,424	0.4%	Home	62	-	-	306	10,343	0.4%	Home	91	-	-	504	\$ 14,081	0.4%	Home							
New - Energy Efficient Fan Control	Home	-	-	-	-	-	0.0%	Home	-	-	-	-	-	0.0%	Home	-	-	-	-	-	-	Home							
New - Prescriptive Duct Sealing	Home	-	-	-	-	-	0.0%	Home	-	-	-	-	-	0.0%	Home	-	-	-	-	-	-	Home							
New - High Efficiency Forced Air Unit (HE FAU)	Home	-	-	-	-	-	0.0%	Home	-	-	-	-	-	0.0%	Home	-	-	-	-	-	-	Home							
New - A/C Time Delay	Home	-	-	-	-	-	0.0%	Home	-	-	-	-	-	0.0%	Home	-	-	-	-	-	-	Home							
New - Smart Thermostat	Home	65	7,313	-	432	11,810	0.2%	Home	31	3,656	-	213	\$ 5,590	0.2%	Home	34	3,656	-	219	\$ 6,220	0.2%	Home							
Maintenance																													
Furnace Clean and Tune	Home	790	-	-	(1,653)	63,537	1.1%	Home	255	-	-	(552)	\$ 20,360	0.9%	Home	535	-	-	(1,101)	\$ 43,177	1.2%	Home							
Central A/C Tune up	Home	-	-	-	-	-	0.0%	Home	-	-	-	-	-	0.0%	Home	-	-	-	-	-	-	Home							
Lighting																													
Interior Hard wired LED fixtures	Each	3,109	13,151	2	(239)	261,032	4.3%	Each	772	3,266	0	(60)	\$ 64,817	2.8%	Each	2,337	9,886	1	(179)	\$ 196,215	5.3%	Each							
Exterior Hard wired LED fixtures	Each	960	4,934	1	-	69,017	1.2%	Each	371	1,907	0	-	\$ 26,703	1.2%	Each	589	3,027	0	-	\$ 42,314	1.1%	Each							
LED Torchiers	Each	3,012	12,741	2	(230)	276,623	4.6%	Each	1,049	4,437	1	(81)	\$ 95,787	4.1%	Each	1,963	8,303	1	(149)	\$ 180,836	4.9%	Each							
Occupancy Sensor	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	-	-	Each							
LED Night Light	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	-	-	Each							
New - LED R/BR Lamps	Each	2,449	7,396	1	(126)	39,600	0.7%	Each	1,301	3,929	0	(65)	\$ 21,037	0.9%	Each	1,148	3,467	0	(61)	\$ 18,563	0.5%	Each							
New - LED A-Lamps	Each	39,901	84,590	10	(1,417)	586,545	9.8%	Each	19,923	42,237	5	(660)	\$ 292,868	12.6%	Each	19,978	42,353	5	(757)	\$ 293,677	8.0%	Each							
Miscellaneous																													
Pool Pumps	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	-	-	Each							
Smart Strip	Each	1,067	149,380	21	-	62,961	1.0%	Each	665	93,100	13	-	\$ 40,866	1.8%	Each	402	56,280	8	-	\$ 22,095	0.6%	Each							
Smart Strip Tier II	Each	1,856	259,840	36	-	153,479	2.6%	Each	889	124,460	17	-	\$ 76,640	3.3%	Each	967	135,380	19	-	\$ 76,839	2.1%	Each							
Pilots																													
							0.0%							0.0%															
Customer Enrollment																													
ESA Outreach & Assessment	Home	7,576				\$ 1,173,689	19.6%	Home	3,460				\$ 525,522	22.7%	Home	4,116				\$ 648,166	17.6%	Home							
ESA In-Home Energy Education	Home	7,580				\$ 221,300	3.7%	Home	3,463				\$ 99,260	4.3%	Home	4,117				\$ 122,040	3.3%	Home							
Total Savings/Expenditures			770,053	103	21,112	\$ 6,001,347				356,644	48	9,723	\$ 2,318,038.47			33,891	413,409	55	11,389	\$ 3,683,309									
Total Households Weatherized [2]		2,588							848							1,740													
Households Treated																													
- Single Family Households Treated	Home	2,160						Home	1,184						Home	976						Home							
- Multi-family Households Treated	Home	4,086						Home	1,655						Home	2,431						Home							
- Mobile Homes Treated	Home	782						Home	374						Home	408						Home							
Total Number of Households Treated	Home	7,028						Home	3,213						Home	3,815						Home							
# Eligible Households to be Treated for PY [3]	Home	23,761						Home	243						Home	23,518						Home							
% of Households Treated	%	30%						%	1322%					%	16%							%							
- Master-Meter Households Treated	Home	360						Home	222						Home	138						Home							
<p>[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.</p> <p>[2] Weatherization may consist of attic insulation, attic access weatherization, weatherstripping - door, caulking, & minor home repairs.</p> <p>[3] Based on OP 79 of D.16-11-022.</p> <p>[4] All savings are calculated based on the following sources: Evergreen Economics "Impact Evaluation of the 2011 CA Low Income Energy Efficiency Program, Final Report." August 30, 2013 [5] Microwave savings are from ECNorthWest Study received in December of 2011 [6] Data for Aliso Canyon includes "First Touches and Re-Treatments". [7] Current Month Expenses for Energy Efficiency Total does not include January accrual and re-accrual of \$436,767 in the following reporting</p>																													
Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.																													

**Energy Savings Assistance Program Table 2A
SDG&E
October 2020**

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

Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may [1] Envelope and Air Sealing Measures may include outlet cover plate gaskets, attic access weatherization, weatherstripping - door, caulking and minor home repairs. Minor home repairs predominantly are door jamb repair / replacement, door repair, and window putty.

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

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

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

Energy Savings Assistance Common Area Measures Program Table 2B

SDG&E

October 2020

Table 2B ESA Program - Multifamily Common Area Measures ⁵							
ESA CAM Measures[1]	Units (of Measure such as "each")	Year-To-Date Completed & Expensed Installation					
		Quantity Installed	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses (\$)	% of Expenditure
Appliances							
Domestic Hot Water							
Central Boiler	Cap-kBTU/h	1170	-	-	3635	\$ 54,471	
Faucet Aerator	Each	9	207	0	23	\$ 68	
Pipe Insulation	Home	3	-	-	26	\$ 2,378	
Envelope							
HVAC							
AC Tune-up	Cap-Tons	95	1,486	1	14	\$ 11,708	
Furnace Replacement	Cap-kBTU/h	148	-	-	45	\$ 4,955	
HEAT Pump Split System	Cap-Tons	20	808	1	(0)	\$ 48,010	
HEAT Pump Split System	Each	5	77	0	(0)	\$ 8,337	
Programmable Thermostat	Each	4	335	-	19	\$ 1,160	
Lighting							
Exterior LED Lighting	Fixture	999	64,662	-	-	\$ 189,085	
Exterior LED Lighting - Pool	Lamp	2	3,790	-	-	\$ 2,371	
Interior LED Exit Sign	Fixture	6	58	0	(0)	\$ 783	
Interior LED Fixture	Fixture	1,556	285,251	67	(822)	\$ 178,931	
Interior LED Lighting	KiloLumen	668	15,568	4	(134)	\$ 70,990	
Interior LED Screw-in	Lamp	592	3,773	1	(14)	\$ 5,993	
Interior TLED Type A Lamps	Lamp	1,999	75,150	18	(723)	\$ 25,354	
Interior TLED Type C Lamps	Lamp	1,051	39,511	10	(377)	\$ 28,451	
Miscellaneous							
Tier-2 Smart Power Strip	Each	31	4,201	1	(53)	\$ 2,989	
Variable Speed Pool Pump	Each	3	7,254	1	-	\$ 3,948	
Ancillary Services							
Audit ⁴		38				\$ 60,292	
Total	-	-	502,131	103	1,638	\$ 639,981	

Multifamily Properties Treated	Number
Total Number of Multifamily Properties Treated²	43
Subtotal of Master-metered Multifamily Properties Treated	11
Total Number of Multifamily Tenant Units w/in Properties Treated³	2714

[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

[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:

Evergreen Economics "Impact Evaluation of the 2011 CA Low Income Energy Efficiency Program, Final Report." August 30, 2013.

[4] Per D.16-11-022 at p.210, the CPUC imposes a cap of 10% of ESA Program funds for administrative activities and a ceiling of 20% for direct implementation non-incentive costs.

[5] Refers to optimizing the installation of the measure installed such as retrofitting pipes, etc.

* Note: Applicable to Deed-Restricted, government and non-profit owned multi-family buildings described in D.16-11-022 where 65% of tenants are income eligible based on CPUC income

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

Note: Implementation of the MF CAM Initiative AL 3196-E-A_2654-G-A was approved effective 5/30/2018.

** Note: This represents the unit of measure such as Cap Tons, Cap kBTU/h or KiloLumen. It is not a count of each measure installed or each home the measure was installed in.

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

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

Standard Notes (do not delete)

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

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

2. Only complete if measure is canceled or discontinued

3. Defined as CEC California Building Climate Zones

https://www.energy.ca.gov/maps/renewable/building_climate_zones.html

	A	B
1	Energy Savings Assistance Program Tables 3A-B - Energy Savings and Average Bill Savings per Treated Home/Common Area	
2	SDG&E	
3	October 2020	
4		
5	Table 3A-1, ESA Program	
6	Annual kWh Savings	770,053
7	Annual Therm Savings	21,112
8	Lifecycle kWh Savings	6,885,655
9	Lifecycle Therm Savings	95,300
10	Current kWh Rate	\$ 0.18
11	Current Therm Rate	\$ 1.08
12	Average 1st Year Bill Savings / Treated households	\$ 21.39
13	Average Lifecycle Bill Savings / Treated Household	\$ 177.86
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	770,053
29	Annual Therm Savings	21,112
30	Lifecycle kWh Savings	6,885,655
31	Lifecycle Therm Savings	95,300
32	Current kWh Rate	\$ 0.18
33	Current Therm Rate	\$ 1.08
34	Average 1st Year Bill Savings / Treated Households	\$ 21.39
35	Average Lifecycle Bill Savings / Treated Households	\$ 177.86
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	502,131
41	Annual Therm Savings	1,638
42	Lifecycle kWh Savings	4,927,145
43	Lifecycle Therm Savings	49,645
44	Current kWh Rate	\$0.18
45	Current Therm Rate	\$1.08
46	Average 1st Year Bill Savings / Treated Property	\$ 2,571.09
47	Average Lifecycle Bill Savings / Treated Property	\$ 26,239.23
48		

	A	B	C	D	E	F	G
1	Energy Savings Assistance Program Table 4 - Homes/Buildings Treated						
2	SDG&E						
3	October 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	211	6,537	6,748
10	Total	6,141	297,811	303,952	211	6,817	7,028
11							
12							
13	Table 4B, ESA Program - CSD Leveraging						
14					Households Treated YTD		
15	County				Rural	Urban	Total
16	Orange						0
17	San Diego					0	0
18	Total				0	0	0
19							
20							
21	Table 4C, ESA Program - Multifamily Common Area						
22		*			Properties Treated YTD		
23	-				-	-	Total
24	Orange	-	-	-	-	-	-
25	San Diego	-	-	-	-	43	43
26	Total					43	43
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							

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

**SDG&E
October 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	130	219	0	0	291	1	53
San Diego	5,608	12,019	30	0	7,630	484	775
Total	5,738	12,238	30	0	7,921	485	828

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

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S		
1	Energy Savings Assistance Program Table 5 - Energy Savings Assistance Program Customer Summary																				
2	SDG&E																				
3	October 2020																				
4	Table 5A, ESA Program																				
5		Gas & Electric				Gas Only				Electric Only				Total							
6		# of Household Treated by Month			(Annual)			# of Household Treated by Month			(Annual)			# of Household Treated by Month			(Household Count)		(Annual)		
7	Month	Therm	kWh	kW	Therm	kWh	kW	Therm	kWh	kW	Therm	kWh	kW	# of First-Touch	# of Re-treatment	Therm	kWh	kW			
8	January	32	393	12,547	2	-	-	-	-	-	-	397	0	32	19	13	393	12,944	2		
9	February	299	2,639	68,573	9	-	-	-	-	70	-	13,798	2	369	203	166	2,639	82,371	11		
10	March	782	3,423	123,770	16	-	-	-	-	271	-	47,714	7	1,053	770	283	3,423	171,485	23		
11	April	2,701	209	162,846	22	-	-	-	-	159	-	9,385	1	2,860	865	1,995	209	172,231	23		
12	May	132	522	15,233	2	-	-	-	-	6	-	2,077	0	138	83	55	522	17,310	2		
13	June	73	2,007	12,189	2	-	-	-	-	3	-	1,093	0	76	33	43	2,007	13,282	2		
14	July	279	4,751	45,875	6	-	-	-	-	11	-	2,900	0	290	163	127	4,751	48,775	6		
15	August	904	4,035	67,648	9	-	-	-	-	36	-	6,255	1	940	429	511	4,035	73,903	10		
16	September	625	804	75,003	10	-	-	-	-	25	-	7,440	1	650	346	304	804	82,443	11		
17	October	594	2,329	86,064	12	-	-	-	-	26	-	9,245	1	620	302	318	2,329	95,309	13		
18	November																				
19	December																				
20	YTD	6,421	21,112	669,749	89	-	-	-	-	607	-	100,304	14	7,028	3,213	3,815	21,112	770,053	103		
21	YTD Total Energy Impacts for all fuel types should equal YTD energy impacts that are reported every month Table 2.																				
22	Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.																				
23	Note: SDG&E tracks the measure savings based on the month and year of install. Households treated can have a value of zero, meaning the treated date is from a previous year but the measure install and savings were tracked in a new Program Year.																				
24																					
25																					
26	Table 5B, ESA Program - CSD Leveraging																				
27		Gas & Electric				Gas Only				Electric Only				Total							
28		# of Household Treated by Month			(Annual)			# of Household Treated by Month			(Annual)			# of Household Treated by Month			(Annual)				
29	Month	Therm	kWh	kW	Therm	kWh	kW	Therm	kWh	kW	Therm	kWh	kW	Therm	kWh	kW					
30	January																				
31	February																				
32	March																				
33	April																				
34	May																				
35	June																				
36	July																				
37	August																				
38	September																				
39	October																				
40	November																				
41	December																				
42	YTD	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0		
43	YTD Total Energy Impacts for all fuel types should equal YTD energy impacts that are reported every month Table 2A.																				
44	Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.																				
45																					
46																					
47																					
48	Table 5C, ESA Program - Multifamily Common Area																				
49		Gas & Electric				Gas Only				Electric Only				Total							
50		# of Properties Treated by Month			(Annual)			# of Properties Treated by Month			(Annual)			# of Properties Treated by Month			(Annual)				
51	Month	Therm	kWh	kW	Therm	kWh	kW	Therm	kWh	kW	Therm	kWh	kW	Therm	kWh	kW					
52	January	-	-	-	-	-	-	-	-	0	0	-	-	0	-	-	0				
53	February	4	(174.31)	64,262.63	####	-	-	-	-	1	-	6802	2	5	-174	71,065	14				
54	March	5	(615.46)	144,491.00	####	-	-	-	-	1	-	16209	3	6	-615	160,700	33				
55	April	8	(258.96)	64,527.36	####	-	-	-	-	-	-	-	8	-259	64,527	11					
56	May	-	-	-	-	-	-	-	-	-	-	-	-	0	-	-	0				
57	June	3	(374.42)	63,636.91	####	-	-	-	-	-	-	-	3	-374	63,637	15					
58	July	10	1,239	68,764	16	-	-	-	-	-	-	-	10	1239	68,764	16					
59	August	7	(213)	66,301	12	-	-	-	-	-	-	-	7	-213	66,301	12					
60	September	1	828	1,531	0	-	-	-	-	-	-	-	1	828	1,531	0					
61	October	3	1,207	5,607	2	-	-	-	-	-	-	-	3	1,207	5,607	2					
62	November	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-			
63	December	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-			
64	YTD	41	1,638	479,120	99	-	-	-	-	2	-	23,011	4	43	1,638	502,131	103				
65	YTD Total Energy Impacts for all fuel types should equal YTD energy impacts that are reported every month Table 2B.																				
66	Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.																				
67																					
68																					

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

**SDG&E
October 2020**

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

7B - Households Receiving In- Home Energy Education Only - YTD		
Measures	Units	Households that Only Received Energy Education
In-Home Education	Home	552

7C - Households for My Energy/My Account Platform - YTD		
Opt-Out	Already Enrolled	Opt-In
7,529	1,758	378

Energy Savings Assistance Program Table 8 - Contractor Advanced Funding and Repayment
SDG&E
October 2020

		B-C			E x F			(B)-(cumulative H + cumulative I)
	Total Advance Eligible for PPRS Credit [1]	Total Advance Not Eligible for PPRS Credit	Percentage for PPRS Credit Calculation [2]	Total Contractor Invoices each month[3]	Total PPRS Credit Earned each month[4]	PPRS Credits Applied each month [5]	Non PPRS Payments Applied each month[6]	Total Advances Outstanding
Jan-20								\$ -
Feb-20								\$ -
Mar-20								\$ -
Apr-20	\$ 552,731			\$ -	\$ -	\$ -	\$ -	\$ 552,731
May-20	\$ 411,190			\$ -	\$ -	\$ -	\$ (87,672)	\$ 876,249
Jun-20	\$ 205,120			\$ -	\$ -	\$ -	\$ (53,278)	\$ 1,028,091
Jul-20	\$ -			\$ -	\$ -	\$ -	\$ (33,550)	\$ 994,541
Aug-20	\$ -			\$ -	\$ -	\$ -	\$ (86,729)	\$ 907,812
Sep-20	\$ -			\$ -	\$ -	\$ -	\$ -	\$ 907,812
Oct-20	\$ -			\$ -	\$ -	\$ -	\$ -	\$ -
Nov-20	\$ -			\$ -	\$ -	\$ -	\$ -	\$ -
Dec-20	\$ -			\$ -	\$ -	\$ -	\$ -	\$ -
Total	\$ 1,169,041		40%	\$ -	\$ -	\$ -	\$ (261,229)	\$ 907,812

IOUs - Do not delete footnotes 1-6 below.

- [1] Contractor labor and labor-related costs. Post-Pandemic Return to Service (PPRS) credit eligible.
- [2] 40% for PPRS credit calculation from Joint Tier 2 Advice Letter 5654-G filed on June 29, 2020.
- [3] For work performed during PPRS credit-earning period for contractors receiving advances. SDG&E has not begun the PPRS Credit earning period.
- [4] Based on total monthly contractor invoices, up to maximum allowable for each contractor.
- [5] Credits may be applied at a later date than earned depending on the contractor repayment schedule. This value should not exceed column G.
- [6] Includes repayments processed for which PPRS credits were not applied, including contractor payments returned unused due to agreement termination or duplicate payments received from other funding sources.
- [7] Advance funding provided to contractors in month occurred.

Note: This table created pursuant to section 1.2.3 in Commission Resolution E-5074. This report covers the period from the issuance of advances until the last day of the month reported. Any required corrections/adjustments are reported herein and supersede results reported in prior months.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	CARE Table 1 - CARE Program Expenses												
2	SDG&E												
3	October 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	\$ 119,462	\$ 14,765	\$ 134,227	\$ 1,917,582	\$ 248,148	\$ 2,165,730	65%	76%	67%
7	Processing / Certification Re-certification [3]	\$ 465,490	\$ 51,721	\$ 517,211	\$ 32,131	\$ 3,971	\$ 36,102	\$ 451,915	\$ 57,164	\$ 509,079	97%	111%	98%
8	Post Enrollment Verification	\$ 327,300	\$ 36,367	\$ 363,667	\$ 9,793	\$ 1,210	\$ 11,004	\$ 110,265	\$ 13,993	\$ 124,258	34%	38%	34%
9	IT Programming	\$ 1,547,910	\$ 171,990	\$ 1,719,900	\$ 63,966	\$ 7,906	\$ 71,872	\$ 536,888	\$ 69,286	\$ 606,174	35%	40%	35%
10	Cooling Centers [2]			\$ -	\$ -	\$ -	\$ -	\$ (37,002)	\$ (5,046)	\$ (42,048)	0%	0%	0%
11													
12	Pilots/CHANGES Program [4]	\$ 240,960	\$ 26,773	\$ 267,733	\$ 4,042	\$ 500	\$ 4,542	\$ 186,235	\$ 23,877	\$ 210,112	77%	89%	78%
13	Studies [5]	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
14	Regulatory Compliance [6]	\$ 273,288	\$ 30,365	\$ 303,653	\$ 123,150	\$ 15,221	\$ 138,370	\$ 401,207	\$ 48,597	\$ 449,804	147%	160%	148%
15	General Administration	\$ 752,622	\$ 83,625	\$ 836,246	\$ 46,186	\$ 5,708	\$ 51,894	\$ 403,122	\$ 51,015	\$ 454,138	54%	61%	54%
16	CPUC Energy Division [7]	\$ 52,067	\$ 5,785	\$ 57,852	\$ 4,502	\$ 556	\$ 5,058	\$ 71,067	\$ 8,988	\$ 80,055	136%	155%	138%
17													
18	SUBTOTAL MANAGEMENT COSTS	\$ 6,588,390	\$ 732,043	\$ 7,320,433	\$ 403,232	\$ 49,838	\$ 453,069	\$ 4,041,280	\$ 516,022	\$ 4,557,302	61%	70%	62%
19													
20	CARE Rate Discount [8]	\$ 107,779,365	\$ 14,644,166	\$ 122,423,531	\$ 13,042,237	\$ 885,010	\$ 13,927,248	\$ 102,658,092	\$ 13,035,863	\$ 115,693,955	95%	89%	95%
21													
22	TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	\$ 114,367,755	\$ 15,376,209	\$ 129,743,964	\$ 13,445,469	\$ 934,848	\$ 14,380,317	\$ 106,699,372	\$ 13,551,885	\$ 120,251,257	93%	88%	93%
23													
24	Other CARE Rate Benefits												
25	- DWR Bond Charge Exemption				\$ 880,571		\$ 880,571	\$ 7,136,462		\$ 7,136,462			
26	- CARE Surcharge Exemption				\$ 1,077,899	\$ 72,384	\$ 1,150,283	\$ 8,735,683	\$ 1,081,693	\$ 9,817,376			
27	- California Solar Initiative Exemption				\$ 0		\$ -	\$ 0		\$ -			
28	- kWh Surcharge Exemption				\$ 140,247		\$ 140,247	\$ 837,065		\$ 837,065			
29	- Vehicle Grid Integration Exemption				\$ 101,013		\$ 101,013	\$ 790,761		\$ 790,761			
30	Total Other CARE Rate Benefits				\$ 2,199,731	\$ 72,384	\$ 2,272,115	\$ 17,499,971	\$ 1,081,693	\$ 18,581,664			
31													
32	Indirect Costs				\$ 74,472	\$ 9,204	\$ 83,676	\$ 647,020	\$ 82,093	\$ 729,113			
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 and reclassified expenses of \$42,048 related to PY2019 as Cool Centers expense activity is now captured under O&M, effective Jan 1, 2019.												
36	[3] Includes additional training hours for Envision and unbudgeted transfers from Customer Call Center.												
37	[4] Decision 15-12-047 transitioned CHANGES pilot to CHANGES program and funding for the effort is captured herein.												
38	[5] Reflects the Annual Eligibility Estimates prepared by Athens Research on behalf of the utilities. This effort was formerly referenced as Measurement and Evaluation.												
39	[6] As lead IOU, SDG&E expensed the full invoice amount for the disaggregated load profile project and reimbursements from the other IOU's are forthcoming. The total expense will decrease as SDG&E's portion for this project is \$10.3%.												
40	[7] Includes additional Energy Division Staff employee benefit expenses not included in the authorized budget.												
41	[8] Updated CARE Discount from \$74,571,504 to \$122,423,531 as authorized in Advice Letter 3440-E and Advice Letter 2815-G, effective January 1, 2020.												
42													
43	NOTE: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.												
44													

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	
1	CARE Table 2 - Enrollment, Recertification, Attrition, & Penetration⁵																									
2	SDG&E																									
3	October 2020																									
4		New Enrollment									Recertification					Attrition (Drop Offs)				Enrollment		Total CARE Participants	Estimated CARE Eligible⁵	Penetration Rate % (W/X)		
5		Automatic Enrollment			Self-Certification (Income or Categorical)						Total New Enrollment (E+J)	Scheduled	Non-Scheduled (Duplicates)	Automatic	Total Recertification (L+M+N)	No Response^{4,5}	Failed^{5,6,7} PEV	Failed Recertification⁵	Other	Total Attrition (P+Q+R+S)	Gross (K+O)				Net Adjusted (K-T)	
6		Inter-Utility¹	Intra-Utility²	Leveraging³	Combined (B+C+D)	Online	Paper	Phone	Capitation	Combined (F+G+H+I)																
7	January	70	172	0	242	4,367	1,306	343	246	6,262	6,504	3,911	3,619	4,130	11,660	1,443	66	171	5,604	7,284	18,164	-780	300,720	302,245	99%	
8	February	0	146	0	146	4,478	978	245	244	5,945	6,091	1,917	2,860	4,160	8,937	1,673	77	153	1,608	3,511	15,028	2,580	303,300	302,245	100%	
9	March	0	79	0	79	7,073	1,368	639	243	9,323	9,402	2,067	2,409	2,298	6,774	64	9	42	3,117	3,232	16,176	6,170	309,470	302,245	102%	
10	April	0	36	0	36	7,017	1,214	735	230	9,196	9,232	219	665	0	884	484	8	9	2,554	3,055	10,116	6,177	315,647	302,245	104%	
11	May	17	6	0	23	6,433	1,336	1,096	218	9,083	9,106	13	583	0	596	0	0	0	2,345	2,345	9,702	6,761	322,408	302,245	107%	
12	June	152	22	0	174	5,300	800	517	169	6,786	6,960	10	434	1	445	0	0	1	3,108	3,109	7,405	3,851	326,259	302,245	108%	
13	July	48	32	0	80	4,889	800	467	183	6,339	6,419	42	483	0	525	0	1	0	3,438	3,439	6,944	2,980	329,239	302,245	109%	
14	August	36	36	0	72	4,270	529	528	130	5,457	5,529	38	520	0	558	0	0	0	3,364	3,364	6,087	2,165	331,404	302,245	110%	
15	September	13	50	0	63	4,201	614	304	141	5,260	5,323	2	522	0	524	0	0	0	3,624	3,624	5,847	1,699	333,103	302,245	110%	
16	October	0	48	0	48	1,901	224	159	87	2,371	2,419	0	524	0	524	0	0	0	3,069	3,069	2,943	-650	332,453	302,245	110%	
17	November	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	302,245	302,245	0%
18	December	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	302,245	302,245	0%
19	YTD Total	336	627	0	963	49,929	9,169	5,033	1,891	66,022	66,985	8,219	12,619	10,589	31,427	3,664	161	376	31,831	36,032	98,412	30,953	332,453	302,245	110%	
20																										
21	1 Enrollments via data sharing between the IOUs.																									
22	2 Enrollments via data sharing between departments and/or programs within the utility.																									
23	3 Enrollments via data sharing with programs outside the IOU that serve low-income customers.																									
24	4 No response includes no response to both Recertification and Verification.																									
25	5 For months of March - July, these numbers may reflect a timing gap in which the reporting period captured the current status for each account before the customer protections were put in place. SDG&E has completed an analysis of the accounts reported and reinstating program enrollment where required.																									
26	6 For the month of September, one account was reported with the incorrect failed PEV status in August status and was dropped in September. An account update is currently in process to reflect the correct account status.																									
27	7 For the month of July, Failed PEV - The account was finalized on 3/30/2020 and customer received PEV and was dropped. However the discount was not impacted as the customer moved out prior to being dropped.																									
28	Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.																									
29																										

	A	B	C	D	E	F	G	H	I
1	CARE Table 3A - Post-Enrollment Verification Results (Model)								
2	SDG&E								
3	October 2020								

4	Month	Total CARE Households Enrolled	Households Requested to Verify ¹	% of CARE Enrolled Requested to Verify Total	CARE Households De-enrolled (Due to no response)	CARE Households De-enrolled (Verified as Ineligible) ²	Total Households De-enrolled ^{3,5}	% De-enrolled through Post Enrollment Verification ⁴	% of Total CARE Households De-enrolled
5	January	300,720	533	0.2%	8	53	61	11.4%	0.0%
6	February	303,300	179	0.1%	3	13	16	8.9%	0.0%
7	March	309,470	26	0.0%	0	2	2	7.7%	0.0%
8	April	315,647	0	0.0%	0	0	0	0.0%	0.0%
9	May	322,408	0	0.0%	0	0	0	0.0%	0.0%
10	June	326,259	0	0.0%	0	0	0	0.0%	0.0%
11	July	329,239	1	0.0%	0	0	0	0.0%	0.0%
12	August	331,404	1	0.0%	0	1	1	100.0%	0.0%
13	September	333,103	0	0.0%	0	0	0	0.0%	0.0%
14	October	332,453	0	0.0%	0	0	0	0.0%	0.0%
15	November	0					0	0.0%	0.0%
16	December	0					0	0.0%	0.0%
17	YTD Total	332,453	740	0.2%	11	69	80	10.8%	0.0%

18

19 ¹ Includes all customers who failed SDG&E's CARE eligibility probability model.

20 ² Includes customers verified as over income or who requested to be de-enrolled.

21 ³ Verification results are tied to the month initiated and the verification process allows customers 90 days to respond to the verification

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

⁵ For the month of August, one account was reported with the incorrect failed PEV status. An account update is currently in process to reflect the correct account status.

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

24

25

26	CARE Table 3B Post-Enrollment Verification Results (Electric only High Usage)								
27	SDG&E								
28	October 2020								

29	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 ^{3,5}	% De-enrolled through Post Enrollment Verification ⁴	% of Total CARE Households De-enrolled
30	January	300,720	242	0.1%	42	14	56	23.1%	0.0%
31	February	303,300	147	0.0%	2	1	3	2.0%	0.0%
32	March	309,470	47	0.0%	0	0	0	0.0%	0.0%
33	April	315,647	14	0.0%	0	0	0	0.0%	0.0%
34	May	322,408	2	0.0%	1	0	1	50.0%	0.0%
35	June	326,259	0	0.0%	0	0	0	0.0%	0.0%
36	July	329,239	4	0.0%	0	0	0	0.0%	0.0%
37	August	331,404	2	0.0%	1	0	1	50.0%	0.0%
38	September	333,103	6	0.0%	0	0	0	0.0%	0.0%
39	October	332,453	80	0.0%	0	0	0	0.0%	0.0%
40	November						0	0.0%	0.0%
41	December						0	0.0%	0.0%
42	YTD Total	332,453	544	0.2%	46	15	61	11.2%	0.0%

43

44 ¹ Includes all participants who were selected for high usage verification process.

45 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.

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

47 ⁵ For the month of May, 1 account was flagged for HEU and was dropped due to having a commercial rate

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

49

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	A	B	C	D	E	F	G							
1	CARE Table 4 - CARE Self-Certification and Self-Recertification Applications¹													
2								SDG&E						
3								October2020						
4		Provided	Received	Approved	Denied	Pending/Never Completed	Duplicates							
5	Total (Y-T-D)	5,455	121,743	67,351	17,383	246	36,763							
6	Percentage		100%	51%	15%	0%	34%							
7	¹ Includes sub-metered. Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.													
8														
9														
10														

	A	B	C	D	E	F	G	H	I	J	K
1	CARE Table 5 - Enrollment by County										
2	SDG&E										
3	October 2020										
4	County	Estimated Eligible Households[1]			Total Households Enrolled[2]			Penetration Rate			
5		Urban	Rural	Total	Urban	Rural[3]	Total	Urban	Rural	Total	
6	Orange	14,908	0	14,908	14,507	0	14,507	97%	NA	97%	
7	San Diego	281,284	6,053	287,337	310,680	7,266	317,946	110%	120%	111%	
8	Total	296,192	6,053	302,245	325,187	7,266	332,453	110%	120%	110%	
9											
10	1 As reflected in filing A.14-11-007, et al., Annual CARE Eligibility Estimates filed February 12, 2020.										
11	2 Total Households Enrolled includes submeter tenants.										
12	3 No Rural eligible population exists in Orange County in SDG&E territory, therefore penetration for Orange County Rural is not applicable.										
13	Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.										
14											
15											

	A	B	C	D	E	F	G	H	I
1	CARE Table 6 - Recertification Results								
2	SDG&E								
3	October 2020								
4	Month	Total CARE Households	Households Requested to Recertify ^{1,5}	% of Households Total (C/B)	Households Recertified ²	Households De-enrolled ³	Recertification Rate % ⁴ (E/C)	% of Total Households De-enrolled (F/B)	
5	January	300,720	2,279	0.8%	2,075	102	91.0%	0.0%	
6	February	303,300	1,234	0.4%	1,122	26	90.9%	0.0%	
7	March	309,470	346	0.1%	299	3	86.4%	0.0%	
8	April	315,647	0	0.0%	0	0	0.0%	0.0%	
9	May	322,408	0	0.0%	0	0	0.0%	0.0%	
10	June	326,259	5	0.0%	0	0	0.0%	0.0%	
11	July	329,239	1	0.0%	0	0	0.0%	0.0%	
12	August	331,404	3	0.0%	0	0	0.0%	0.0%	
13	September	333,103	1	0.0%	0	0	0.0%	0.0%	
14	October	332,453	0	0.0%	0	0	0.0%	0.0%	
15	November								
16	December								
17	YTD	332,453	3,869	1.2%	3,496	131	90.4%	0.0%	
18									
19									
20	1 As reflected in filing A.14-11-007, et al., Annual CARE Eligibility Estimates filed February 12, 2020.								
21	2 Data represents total residential electric customers.								
22	3 Includes customers who did not respond or who requested to be de-enrolled.								
23	4 Percentage of customers recertified compared to the total participants requested to recertify in that month.								
24	5 Customers can manually request to recertify but are automatically placed in the COVID protection category								
25	Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.								
26									

	A	B	C	D	E	F	G
1	CARE Table 7 - Capitation Contractors¹						
2	SDG&E						
3	October 2020						
4	Contractor	Contractor Type				Total Enrollments	
5		(Check one or more if applicable)				Current Month	Year-to-Date
6		Private	CBO	WMDVBE	LIHEAP		
7	211 SAN DIEGO		X			65	1333
8	211 ORANGE COUNTY		X			-	-
9	ALLIANCE FOR AFRICAN ASSISTANCE		X			-	2
10	AMERICAN RED CROSS WIC OFFICES		X	X		-	4
11	CATHOLIC CHARITIES		X			-	-
12	CHULA VISTA COMMUNITY COLLABORATIVE		X			-	6
13	COMMUNITY RESOURCE CENTER		X			-	6
14	HEARTS AND HANDS WORKING TOGETHER		X			-	-
15	HOME START		X			-	-
16	HORN OF AFRICA		X			-	-
17	INTERFAITH COMMUNITY SERVICES		X			-	-
18	LA MAESTRA FAMILY CLINIC		X		X	-	0
19	MAAC PROJECT		X			-	15
20	NEIGHBORHOOD HEALTH CARE	X				-	2
21	NORTH COUNTY HEALTH SERVICES		X			-	4
22	SAN DIEGO STATE UNIVERSITY WIC OFFICES		X			-	9
23	SAN YSIDRO HEALTH CENTERS		X			1	10
24	SCRIPPS HEALTH WIC		X			-	3
25	UNION OF PAN ASIAN COMMUNITIES SAN DIEGO(UPAC)		X			-	-
26	VISTA COMMUNITY CLINIC		X			-	1
27	Total Enrollments					66	1,395
28	¹ All capitation contractors with current contracts are listed regardless of whether they have signed up customers or submitted invoices this year. Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD						
29							
30							
31							
32							
33							

	A	B	C	D	E	F	G	H	I
1	CARE Table 8 - Households as of Month-End								
2	SDG&E								
3	October 2020								
4	Month	Gas and Electric	Gas Only	Electric Only	Total	Eligible Households ¹	Penetration	% Change	Total Residential Accounts ²
5	January	189,054	0	113,180	302,234	302,245	100%	0.2%	1,341,831
6	February	189,729	0	113,571	303,300	302,245	100%	0.2%	1,343,746
7	March	193,929	0	115,541	309,470	302,245	102%	0.2%	1,345,511
8	April	197,935	0	117,712	315,647	302,245	104%	0.2%	1,346,791
9	May	202,444	0	119,964	322,408	302,245	107%	0.2%	1,348,274
10	June	204,849	0	121,410	326,259	302,245	108%	0.2%	1,350,228
11	July	206,798	0	122,441	329,239	302,245	109%	0.2%	1,351,826
12	August	208,376	0	123,028	331,404	302,245	110%	0.2%	1,353,298
13	September	209,530	0	123,573	333,103	302,245	110%	0.2%	1,354,885
14	October	209,405	0	123,048	332,453	302,245	110%	0.2%	1,356,697
15	November								
16	December								
17	YTD	209,405	N/A	123,048	332,453	302,245	110%	0.2%	1,356,697
18									
19	1 As reflected in filing A.14-11-007, et al., Annual CARE Eligibility Estimates filed February 12, 2020.								
20	2 Data represents total residential electric customers.								
21									
22	Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.								
23									
24									

	A	B	C	D	E	F	G
1	CARE Program Table 9 - Expenditures for Pilots/CHANGES Program¹						
2	SDG&E						
3	October 2020						
4	2020	Authorized 2020 Budget	Current Month Expenses	Expenses Since Jan. 1, 2020	% of 2020 Budget Expended		
5		Total	Total	Total	Total		
6							
7							
8	CHANGES Program	\$ 267,733	\$ 21,875	\$ 205,570	77%		
9							
10							
11	Total	\$ 267,733	\$ 21,875	\$ 205,570	77%		
12							
13	1. Decision 15-12-047 transitioned CHANGES pilot to CHANGES program and funding for the effort is captured herein.						
14							
15	NOTE: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.						

CARE Table 10 CHANGES One-On-One Customer Assistance Sessions San Diego Gas & Electric	
Reporting Period September 2020[1]	
No. of attendees at education sessions	91
Disputes	
Add Level Pay Plan	0
Assisted with CARE Re-Certification/Audit	3
Changed 3rd party Company/Gas Aggregation	0
Changed 3rd Party Electricity Aggregation	0
Enroll in Energy Assistance Programs	8
High Energy CARE User	3
Medical Baseline Application	0
Payment Extension	0
Payment Plan	2
Request Bill Adjustment	2
Request Customer Service Visit	8
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]	26
Needs Assistance	
Add/Remove Level Pay Plan	0
CARE Enrollment	0
Assisted with CARE Re-Certification/Audit	0
Assisted with Changes to Account	0
Energy Efficiency Tool	0
Assisted High Energy User with CARE Doc Submission	0
Assisted with Reconnection	0
Billing Language Changed	0
Consumer Education Only	0
Electricity Aggregation	0
Energy Alerts	0
Enrolled in Demand Response Programs	0
ESAP	0
HEAP/LiHEAP	0
Medical Baseline	0
Neighbor to Neighbor	18
REACH	0
Reported Safety Problem	0
Reported Scam	0
Set Up 3rd Party Notification	0
Set Up New Account	0
Payment Extension	3
Payment Plan	3
Wildfire Related Issue	0
Total Needs Assistance [2]	24

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, French, Spanish, Urdu

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

[3] Per CHANGES Vendor: The total number of services may exceed the total number of cases because some cases will include more than one service provided.

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

CARE Table 11 CHANGES Group Customer Assistance Sessions

SDG&E

2020 [1,2]

Date ³	Session Language	Description of Service Provided (e.g. utility bill assistance, utility bill dispute resolution, and other energy related issues)	Session Logistics			
			# of Sessions	Length (Hours) ⁴	Number of Attendees	Description of Information / Literature Provided
N/A		Avoiding Disconnection	0	N/A	0	CHANGES Ed Handout
N/A		CARE/FERA and Other Assistance Programs	0	N/A	0	CHANGES Ed Handout
N/A		Electric and Natural Gas Safety	0	N/A	0	CHANGES Ed Handout
N/A		Energy Conservation	0	N/A	0	CHANGES Ed Handout
N/A		Gas Aggregation	0	N/A	0	CHANGES Ed Handout
N/A		High Energy Use	0	N/A	0	CHANGES Ed Handout
N/A		Level Pay Plan	0	N/A	0	CHANGES Ed Handout
N/A		Understanding Your Bill	0	N/A	0	CHANGES Ed Handout
Current Month			0		0	
Year-to-Date			378		1910	

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

[2] As of June 1st, 2020, CHANGES one-on-one data reports have moved from monthly to quarterly for the 2020-2021 program contract year. The data for Q2 September 1-November 30, 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.