

**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 NOVEMBER 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.<sup>1</sup> SDG&E has five contractors who accepted advance payments and are eligible to earn PPRS credit.

In November, SDG&E Outreach and Assessment (O&A) contractors continued to provide in-home enrollments and treatments plus offered virtual enrollments to customers preferring to delay in-home treatment. Contractors reported that customers continue to be interested in receiving in-home treatment, but once again the uptick in COVID-19 cases has started to impact enrollment efforts. For example, contractors have reported an increase in customers canceling appointments due to quarantine requirements. In addition, contractors have reported workforce issues related to their employees self-quarantining as a result of non-ESA Program related COVID-19 exposures. None of these issues have been reported to SDG&E as having resulted in a confirmed COVID infection.

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<sup>1</sup> 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.

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

<b>ESA Program Summary through November 2020</b>			
	<b>2020 Authorized / Planning Assumptions</b>	<b>Actual to Date<sup>2</sup></b>	<b>%</b>
Budget <sup>3</sup>	\$35,509,153	\$14,059,600	40%
Homes Treated <sup>4</sup>	23,761	8,224	35%
kWh Saved	7,220,000	937,231	13%
kW Demand Reduced	3,954	125	3%
Therms Saved	420,000	31,165	7%
GHG Emissions Reduced (Tons)	6,428	698	11%

**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 November.

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

ESA Program Contractor Outreach

In November, SDG&E’s largest O&A contractor experienced a decrease in canvassing activities due to workforce quarantine issues as described in the

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<sup>2</sup> 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.

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

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

COVID-19 Program Impacts section above. In November, 383 enrollments were received through canvassing efforts, a decrease of approximately 18% when compared to October enrollments. Contractors are also 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 812 customers in November, 18% lower than October enrollments.<sup>5</sup>

#### ESA Program Multifamily Common Area Measure (MF CAM) Initiative

In November 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, 54 properties have been treated in 2020 and 11 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

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

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 November, one customer was served by the Language Line.

Language	Calls
Korean	1
<b>TOTAL</b>	1

### **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 November 2020 are summarized in the following sections:

#### Streaming TV

In November, 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 November, 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 41,169 impressions in November with a click-through-rate (CTR) of 23 percent (%). Paid Social ads did not run in November. Banner Display Ads for November had 6,518,376 impressions with a CTR of 0.34%. Native online advertising had 624,000 impressions with a CTR of 0.12%. ESA-specific online advertising, which had been on hold due to the COVID-19 pandemic continued in November. 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 125 customer assistance messages in November to an audience of more than 168,000 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.

 **MANA de San Diego** @MANAdeSanDiego · Nov 12 ...

Hardship is everywhere right now – the last thing you need is to worry about your energy bill. Get help with your bill at [sdge.com/assistance](https://sdge.com/assistance).  
[#sdge](#) [#energytips4u](#)



   5 

 **SustainableFuture** @SustainableFutu · Nov 23 ...

California Alternate Rates for Energy (CARE) Program: Save 30% or more every month on your bill. Find out if you qualify at [sdge.com/CARE](https://sdge.com/CARE).  
[#sdge](#) [#energytips4u](#)

   

## Direct Marketing

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

### Direct Mail

SDG&E continued direct mail efforts and sent 11,222 postcards to promote the ESA Program to potential customers.

### Email

SDG&E sent a November e-mail to promote the ESA Program to potential customers, which was sent to 83 customers with a 0% click-through rate.

### Live CARE Call Campaign

SDG&E's third-party contractor, The Harris Group (THG), called targeted customers to enroll in the CARE Program.<sup>6</sup> 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 November 2020 generated the following numbers:

<b>The Harris Group</b>	
ESA Leads	0
CARE Enrollments	1,853
CARE Recertifications <sup>7</sup>	12

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

<sup>7</sup> 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.

## **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 November 2020, SDG&E’s partner outreach activities resulted in the following activities:

<b>Energy Solutions Partner Network</b>	
ESA Leads	0
CARE Enrollments	2
CARE Recertifications <sup>8</sup>	3

### Partner Spotlight

In November 2020, the SDG&E Customer Solutions Outreach Team participated in 30 events, presentations, and trainings/workshops, 20 of which were virtual,

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<sup>8</sup> 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.

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 1,800 people in November.

#### Energy Solutions Partner Virtual Presentations

##### *Vista Boys and Girls Club*

On November 12, Outreach hosted a virtual presentation for the staff at Vista Boys and Girls Club. Topics included information on SDG&E's low-income programs, payment solutions, My Account, the COVID-19 response, and tips for energy savings. The presentation was in preparation for the organization's child registration, where CARE applications will also be distributed to families in need.

##### *Family Assistance Ministries*

On November 24, Outreach conducted a virtual presentation to the staff at Family Assistance Ministries. Topics included low-income programs, My Account, the COVID-19 response, tips for energy savings and energy efficiency, as well as, payment solutions.

In November, the Family Assistance Ministries also passed out CARE applications at their drive-thru food distribution program. During these events, they handed out 200 turkeys with a CARE application.

### Multicultural Outreach

To continue efforts to reduce potential barriers for customers in the rural, multicultural/multilingual, and special needs 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 November 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's 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 November 2020, SDG&E's CCC and Branch Office generated the following applications and leads over the telephone:

	<b>CCC</b>	<b>Branch Office</b>
ESA Leads	2	2
CARE Enrollments	3	3
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 November. Through November, SDG&E enrollments remain at 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. SDG&E has not received a finalized NDA from GRID. 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 no leads generated and provided to GRID Alternatives during the month of November.

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 November, 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 November, LIHEAP organizations generated 134 leads for the ESA Program and enrolled 66 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 November 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 November, SCE continued contract negotiations with the study team's selected bidder.

## Non Energy Benefits (NEB) Assessment

The study team continued to meet during November to review and discuss the draft deliverables.

### **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 <sup>9</sup>	Actual Expenses to Date	% of Budget Spent
Outreach	\$3,254,171	\$2,319,957	71%
Proc., Certification and Verification	\$517,211	\$549,601	106%
Post Enrollment Verification	\$363,667	\$134,580	37%
Information Tech./Programming	\$1,719,900	\$664,536	39%
Pilots-CHANGES	\$267,733	\$231,987	87%
Regulatory Compliance	\$303,653	\$481,143	158%
General Administration	\$836,246	\$526,077	63%
CPUC Energy Division Staff	\$57,852	\$80,055	138%
Cooling Centers <sup>10</sup>	\$0	\$(42,048)	0%
<b>Total Expenses</b>	<b>\$7,320,433</b>	<b>\$4,945,890</b>	<b>68%</b>
Subsidies and Benefits <sup>11</sup>	\$122,423,531	\$127,187,015	104%
<b>Total Program Costs and Discounts</b>	<b>\$129,743,964</b>	<b>\$132,132,905</b>	<b>102%</b>

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

<sup>10</sup> 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.

<sup>11</sup> 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.**

<b>CARE Penetration</b>		
<b>Participants Enrolled</b>	<b>Eligible Participants<sup>12</sup></b>	<b>Penetration Rate</b>
335,091	302,245	111%

**CARE Program – Annual Estimated Eligibility**

To better understand the effects of the COVID pandemic on the eligible low income population, the investor-owned utilities (IOUs) worked with Athens Research to develop an interim estimate of COVID-period CARE eligibility impacts. The analysis showed CARE eligibility estimated to increase approximately 13% statewide when no Federal assistance was factored in and approximately 8.5% with Federal assistance included.

This estimate was not meant to officially update the eligibility estimate for program year 2020, but rather to provide insight into the developing trends in unemployment and subsequently, CARE eligibility. As the conditions surrounding the pandemic remain volatile and uncertain, formal estimation changes are not feasible at this time. The IOUs are currently working with Athens

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<sup>12</sup> 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.

Research to develop the eligibility estimates for 2021, which will be filed by February 12, 2021.<sup>13</sup>

## **2.2 Outreach**

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

In November 2020, marketing and outreach efforts generated 2,507 completed CARE applications and 1,791 new enrollments/recertifications for the program.

Below is a summary of CARE specific outreach efforts.

#### **Direct Marketing**

##### Direct Mail

In November 2020, SDG&E continued the bill comparison campaign by mailing a comparison letter to 27,393 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.

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<sup>13</sup> On December 16, 2020, Pacific Gas and Electric Company, on behalf of the IOUs, requested an extension of time to comply which extends the deadline from December 31 to February 12. This deadline is still pending approval from the Executive Director.

## Email

In November 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 November 2020, SDG&E sent out 102,497 emails (many of these reminders) which generated a 30% open rate and a 4% 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 November, the following numbers were generated by the Capitation Agencies:

<b>Capitation Agencies</b>	
ESA Leads	69
CARE Enrollments	138
CARE Recertifications <sup>14</sup>	2

Cool Zones

The San Diego County Cool Zone program ended the 2020 season on October 31 and the program is expected to resume again in May of 2021.

Women’s Infant & Children Organizations

In November, 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. SDG&E Outreach held a virtual refresher training for 80 WIC staff members in November. With the closure of WIC offices, the refresher course was given to provide a walkthrough on how to use the company’s CARE portal in order to process customer applications online.

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<sup>14</sup> 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.



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 November 2020, the following applications were received:

HHSA	November	YTD
ESA Leads	0	0
CARE Enrollments	41	957
CARE Recertifications <sup>15</sup>	4	340

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

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<sup>15</sup> 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 October 2020. As of June 1, 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.<sup>16</sup>

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<sup>16</sup> 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**

**Table 1L - Energy Savings Assistance Program Expenses - San Diego Gas & Electric**  
November 2020

LIEE Program:	Budget			Current Month Expenses			Year to Date Expenses			% of Budget Spent YTD		
	Electric	Gas	Elec & Gas	Electric	Gas	Elec & Gas	Electric	Gas	Elec & Gas	Electric	Gas	Elec & Gas
Energy Efficiency												
Appliance	\$ 854,260	\$ 319,825	\$ 1,174,085	\$ 84,276	\$ 25,925	\$ 110,201	\$ 166,088	\$ 346,183	\$ 512,271	19%	108%	44%
Domestic Hot Water	\$ 65,958	\$ 2,132,630	\$ 2,198,588	\$ 4,693	\$ 151,743	\$ 156,436	\$ 23,949	\$ 774,365	\$ 798,314	36%	36%	36%
Enclosure	\$ 2,560,350	\$ 3,393,952	\$ 5,954,302	\$ 100,395	\$ 133,082	\$ 233,477	\$ 484,871	\$ 642,735	\$ 1,127,606	19%	19%	19%
HVAC	\$ 427,358	\$ 3,727,353	\$ 4,154,711	\$ 61,167	\$ 198,813	\$ 259,980	\$ 136,081	\$ 1,318,398	\$ 1,454,479	32%	35%	35%
Maintenance	\$ 7,063	\$ 291,617	\$ 298,680	\$ -	\$ 10,347	\$ 10,347	\$ -	\$ 71,090	\$ 71,090	0%	24%	24%
Lighting	\$ 4,642,829	\$ -	\$ 4,642,829	\$ 214,434	\$ -	\$ 214,434	\$ 1,693,558	\$ -	\$ 1,693,558	36%	0%	36%
Miscellaneous	\$ 1,775,159	\$ -	\$ 1,775,159	\$ 46,954	\$ -	\$ 46,954	\$ 344,136	\$ -	\$ 344,136	19%	0%	19%
Customer Enrollment	\$ 2,195,740	\$ 2,195,740	\$ 4,391,481	\$ 98,019	\$ 98,019	\$ 196,038	\$ 1,055,692	\$ 1,055,692	\$ 2,111,384	48%	48%	48%
In Home Education	\$ 534,345	\$ 534,345	\$ 1,068,689	\$ 18,905	\$ 18,905	\$ 37,810	\$ 192,727	\$ 192,727	\$ 385,454	36%	36%	36%
Contractor Advanced Funds	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 453,911	\$ 453,911	\$ 907,821	0%	0%	0%
Pilot	\$ 25,000	\$ 25,000	\$ 50,000	\$ -	\$ -	\$ -	\$ 18,283	\$ 18,283	\$ 36,565	73%	73%	73%
Fund Shifting Offset	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Multi-Family Common Area Measures	\$ 1,767,500	\$ 1,767,500	\$ 3,535,000	\$ 82,121	\$ 82,121	\$ 164,243	\$ 971,035	\$ 295,212	\$ 1,266,247	55%	17%	36%
Leveraging	\$ 241,216	\$ 241,216	\$ 482,431	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
<b>Energy Efficiency TOTAL</b>	<b>\$ 15,096,777</b>	<b>\$ 14,629,178</b>	<b>\$ 29,725,955</b>	<b>\$ 710,964</b>	<b>\$ 718,955</b>	<b>\$ 1,429,919</b>	<b>\$ 5,540,330</b>	<b>\$ 5,168,596</b>	<b>\$ 10,708,926</b>	<b>37%</b>	<b>35%</b>	<b>36%</b>
Training Center	\$ 249,089	\$ 249,089	\$ 498,179	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Inspections	\$ 90,210	\$ 90,210	\$ 180,420	\$ 4,216	\$ 4,216	\$ 8,432	\$ 69,849	\$ 69,849	\$ 139,698	77%	77%	77%
Marketing and Outreach	\$ 600,000	\$ 600,000	\$ 1,200,000	\$ 51,307	\$ 51,307	\$ 102,613	\$ 573,986	\$ 573,986	\$ 1,147,972	96%	96%	96%
Statewide ME&O	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
M&E Studies	\$ 47,708	\$ 47,708	\$ 95,416	\$ 6,061	\$ 6,061	\$ 12,121	\$ 41,156	\$ 41,156	\$ 82,313	86%	86%	86%
Regulatory Compliance	\$ 168,266	\$ 168,266	\$ 336,532	\$ (13,651)	\$ (13,651)	\$ (27,301)	\$ 226,548	\$ 226,548	\$ 453,096	135%	135%	135%
General Administration	\$ 1,368,601	\$ 1,368,601	\$ 2,737,202	\$ 123,583	\$ 123,583	\$ 247,166	\$ 746,644	\$ 746,643	\$ 1,493,287	55%	55%	55%
CPUC Energy Division	\$ 23,877	\$ 23,877	\$ 47,754	\$ -	\$ -	\$ -	\$ 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%
<b>TOTAL PROGRAM COSTS</b>	<b>\$ 17,988,376</b>	<b>\$ 17,520,777</b>	<b>\$ 35,509,153</b>	<b>\$ 882,479</b>	<b>\$ 890,470</b>	<b>\$ 1,772,949</b>	<b>\$ 7,215,668</b>	<b>\$ 6,843,932</b>	<b>\$ 14,059,600</b>	<b>40%</b>	<b>39%</b>	<b>40%</b>
<b>Funded Outside of LIEE Program Budget</b>												
Indirect Costs				\$ 40,959	\$ 41,001	\$ 81,960	\$ 457,903	\$ 431,407	\$ 889,310			
NGAT Costs		\$288,000			\$ 16,913	\$ 16,913		\$ 87,263	\$ 87,263			

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

**November 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
<b>Energy Efficiency</b>												
Appliances	\$ 854,260	\$ 319,825	\$ 1,174,085	\$ 84,276	\$ 25,925	\$ 110,201	\$ 166,088	\$ 346,183	\$ 512,271	19%	108%	44%
Domestic Hot Water	\$ 65,958	\$ 2,132,630	\$ 2,198,588	\$ 4,693	\$ 151,743	\$ 156,436	\$ 23,949	\$ 774,365	\$ 798,314	36%		36%
Enclosure	\$ 2,560,350	\$ 3,393,952	\$ 5,954,302	\$ 100,395	\$ 133,082	\$ 233,477	\$ 484,871	\$ 642,735	\$ 1,127,606	19%	19%	19%
HVAC	\$ 427,358	\$ 3,727,353	\$ 4,154,711	\$ 61,167	\$ 198,813	\$ 259,980	\$ 136,081	\$ 1,318,398	\$ 1,454,479	32%	35%	35%
Maintenance	\$ 7,063	\$ 291,617	\$ 298,680	\$ -	\$ 10,347	\$ 10,347	\$ -	\$ 71,090	\$ 71,090	0%	24%	24%
Lighting	\$ 4,642,829	\$ -	\$ 4,642,829	\$ 214,434	\$ -	\$ 214,434	\$ 1,693,558	\$ -	\$ 1,693,558	36%	0%	36%
Miscellaneous	\$ 1,775,159	\$ -	\$ 1,775,159	\$ 46,954	\$ -	\$ 46,954	\$ 344,136	\$ -	\$ 344,136	19%	0%	19%
Customer Enrollment	\$ 2,195,740	\$ 2,195,740	\$ 4,391,481	\$ 98,019	\$ 98,019	\$ 196,038	\$ 1,055,692	\$ 1,055,692	\$ 2,111,384	48%	48%	48%
In Home Education	\$ 348,433	\$ 348,433	\$ 696,865	\$ 18,905	\$ 18,905	\$ 37,810	\$ 192,727	\$ 192,727	\$ 385,454	55%	55%	55%
Contractor Advanced Funds	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 453,911	\$ 453,911	\$ 907,821	0%	0%	0%
Pilot	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
<b>Energy Efficiency TOTAL [3]</b>	<b>\$ 12,877,149</b>	<b>\$ 12,409,550</b>	<b>\$ 25,286,700</b>	<b>\$ 628,842</b>	<b>\$ 636,834</b>	<b>\$ 1,265,676</b>	<b>\$ 4,551,012</b>	<b>\$ 4,855,101</b>	<b>\$ 9,406,113</b>	<b>35%</b>	<b>39%</b>	<b>37%</b>
Training Center	\$ 249,089	\$ 249,089	\$ 498,179	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Inspections	\$ 90,210	\$ 90,210	\$ 180,420	\$ 4,216	\$ 4,216	\$ 8,432	\$ 69,849	\$ 69,849	\$ 139,698	77%	77%	77%
Marketing and Outreach	\$ 600,000	\$ 600,000	\$ 1,200,000	\$ 51,307	\$ 51,307	\$ 102,613	\$ 573,986	\$ 573,986	\$ 1,147,972	96%	96%	96%
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	\$ (13,651)	\$ (13,651)	\$ (27,301)	\$ 226,548	\$ 226,548	\$ 453,096	135%	135%	135%
General Administration [5]	\$ 1,368,601	\$ 1,368,601	\$ 2,737,202	\$ 123,583	\$ 123,583	\$ 247,166	\$ 746,644	\$ 746,644	\$ 1,493,287	55%	55%	55%
CPUC Energy Division	\$ 23,877	\$ 23,877	\$ 47,754	\$ -	\$ -	\$ -	\$ 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%
<b>TOTAL PROGRAM COSTS</b>	<b>\$ 15,738,123</b>	<b>\$ 15,270,524</b>	<b>\$ 31,008,648</b>	<b>\$ 794,297</b>	<b>\$ 802,288</b>	<b>\$ 1,596,585</b>	<b>\$ 6,185,194</b>	<b>\$ 6,489,280</b>	<b>\$ 12,674,474</b>	<b>39%</b>	<b>42%</b>	<b>41%</b>
<b>Funded Outside of ESA Program Budget</b>												
Indirect Costs				\$ 40,959	\$ 41,001	\$ 81,960	\$ 457,903	\$ 431,407	\$ 889,310			
NGAT Costs		\$ 288,000	\$ 288,000		\$ 16,913	\$ 16,913		\$ 87,263	\$ 87,263		30%	30%

[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 \$154,426 in the following reporting categories: Appliances \$0; Domestic Hot Water \$5,367; Enclosure \$7,000; HVAC \$11,815; Maintenance \$4,247; Lighting \$30,611; Miscellaneous \$9,529; Customer Enrollment \$78,864; In Home Energy Education \$13,986.

[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%. Negative amounts are due to the reclass of mischarged expenses.

[5] A total of \$907,821 for COVID 19 advanced payments was moved from "General Administration" to "Contractor Advanced Payments". Payment detail is as follows: 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.

**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**  
**November 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
<b>Energy Efficiency</b>												
Multi-Family Common Area Measures	\$ 1,767,500	\$ 1,767,500	\$ 3,535,000	\$ 82,121	\$ 82,121	\$ 164,243	\$ 971,035	\$ 295,212	\$ 1,266,247	55%	17%	36%
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	\$ -	\$ -	\$ -	\$ 18,283	\$ 18,283	\$ 36,565	73%	73%	73%
Studies [5] [6]	\$ 30,625	\$ 30,625	\$ 61,250	\$ 6,061	\$ 6,061	\$ 12,121	\$ 41,156	\$ 41,156	\$ 82,313	134%	134%	134%
Regulatory Compliance												
General Administration												
<b>TOTAL PROGRAM BUDGET/EXPENSES</b>	<b>\$ 2,250,253</b>	<b>\$ 2,250,253</b>	<b>\$ 4,500,505</b>	<b>\$ 88,182</b>	<b>\$ 88,182</b>	<b>\$ 176,364</b>	<b>\$ 1,030,474</b>	<b>\$ 354,652</b>	<b>\$ 1,385,125</b>	<b>46%</b>	<b>16%</b>	<b>31%</b>

[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

November 2020

Table with 25 columns: Measures, Units, Quantity Installed, kWh [4] (Annual), kW [4] (Annual), Therms [4] (Annual), Expenses (\$) [7], % of Expenditure, and four columns for each program type (ESA Program Summary Total, ESA Program First Touch Homes Treated, ESA Program Re-Treated Homes/Go Backs, ESA Program Aliso Canyon - SCG & SCE [6]).

[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] Based on OP 79 of D.16-11-022.

[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

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  
November 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
<b>Appliances</b>							
High Efficiency Clothes Washer	Each	-	-	-	-	\$ -	0.0%
Refrigerators	Each	-	-	-	-	\$ -	0.0%
Microwaves [4]	Each	-	-	-	-	\$ -	0.0%
<b>Domestic Hot Water</b>							
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%
<b>Enclosure</b>							
Air Sealing / Envelope [1]	Home	-	-	-	-	\$ -	0.0%
Caulking	Home	-	-	-	-	\$ -	0.0%
Attic Insulation	Home	-	-	-	-	\$ -	0.0%
<b>HVAC</b>							
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%
<b>Maintenance</b>							
Furnace Clean and Tune	Home	-	-	-	-	\$ -	0.0%
Central A/C Tune up	Home	-	-	-	-	\$ -	0.0%
<b>Lighting</b>							
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%
<b>Miscellaneous</b>							
Pool Pumps	Each	-	-	-	-	\$ -	0.0%
Smart Power Strips - Tier 1	Each	-	-	-	-	\$ -	0.0%
Smart Power Strips - Tier 2	Each	-	-	-	-	\$ -	0.0%
<b>Pilots</b>							
<b>Customer Enrollment</b>							
Outreach & Assessment	Home	-				\$ -	0.0%
In-Home Education	Home	-				\$ -	0.0%
<b>Total Savings/Expenditures</b>							
			-	-	-	\$ -	0.0%
Total Households Weatherized [2]							
<b>CSD MF Tenant Units Treated</b>							
			<b>Total</b>				

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

November 2020

Table 2B ESA Program - Multifamily Common Area Measures <sup>5</sup>								
	Units (of Measure such as "each")	Year-To-Date Completed & Expensed Installation						% of Expenditure
		Quantity Installed	Number of Units for Cap-kBTUh and Cap-Tons	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses (\$)	
<b>ESA CAM Measures[1]</b>								
<b>Appliances</b>								
<b>Domestic Hot Water</b>								
Central Boiler**	Cap-kBTUh	1170	4	-	-	3635	\$ 54,471	
Faucet Aerator	Each	19		438	0	60	\$ 146	
Pipe Insulation	Home	3		-	-	26	\$ 2,378	
<b>Envelope</b>								
<b>HVAC</b>								
AC Tune-up**	Cap-Tons	121	38	1,926	2	18	\$ 14,926	
Furnace Replacement**	Cap-kBTUh	148	3	-	-	45	\$ 4,955	
HEAT Pump Split System**	Cap-Tons	20		808	1	(0)	\$ 48,010	
HEAT Pump Split System	Each	5		77	0	(0)	\$ 10,454	
Programmable Thermostat	Each	4		335	-	19	\$ 1,160	
<b>Lighting</b>								
Exterior LED Lighting	Fixture	1,292		83,845	-	-	\$ 241,547	
Exterior LED Lighting - Pool	Lamp	2		3,790	-	-	\$ 2,371	
Interior LED Exit Sign	Fixture	6		58	0	(0)	\$ 783	
Interior LED Fixture	Fixture	1,830		337,213	79	(951)	\$ 211,154	
Interior LED Lighting**	KiloLumen	702		16,360	4	(142)	\$ 75,547	
Interior LED Screw-in	Lamp	893		4,029	1	(15)	\$ 8,993	
Interior TLED Type A Lamps	Lamp	2,700		101,504	25	(961)	\$ 34,467	
Interior TLED Type C Lamps	Lamp	1,198		45,038	11	(430)	\$ 32,545	
<b>Miscellaneous</b>								
Tier-2 Smart Power Strip	Each	31		4,201	1	(53)	\$ 2,989	
Variable Speed Pool Pump	Each	3		7,254	1	-	\$ 3,948	
<b>Ancillary Services</b>								
Audit <sup>4</sup>		38					\$ 60,292	
<b>Total</b>	-	-		606,876	124	1,251	\$ 750,845	
<b>Multifamily Properties Treated</b>		<b>Number</b>						
<b>Total Number of Multifamily Properties Treated<sup>2</sup></b>		54						
<b>Subtotal of Master-metered Multifamily Properties Treated</b>		14						
<b>Total Number of Multifamily Tenant Units w/in Properties Treated<sup>3</sup></b>		3593						

[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 and Cap kBTUh. It is not a count of each measure installed or each home the measure was intalled in.

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

Common Area Measures Category and Eligible Measures Title [1]	Effective Date	End Date[2]	Eligible Climate Zones [3]
<b>Appliances</b>			
<b>Domestic Hot Water</b>			
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
<b>Envelope</b>			
<b>HVAC</b>			
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
<b>Lighting</b>			
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
<b>Miscellaneous</b>			
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](https://www.energy.ca.gov/maps/renewable/building_climate_zones.html)

**Energy Savings Assistance Program Tables 3A-B - Energy Savings and  
Average Bill Savings per Treated Home/Common Area  
SDG&E  
November 2020**

<b>Table 3A-1, ESA Program</b>	
Annual kWh Savings	937,231
Annual Therm Savings	31,165
Lifecycle kWh Savings	8,469,747
Lifecycle Therm Savings	181,269
Current kWh Rate	\$ 0.18
Current Therm Rate	\$ 1.08
Average 1st Year Bill Savings / Treated households	\$ 23.18
Average Lifecycle Bill Savings / Treated Household	\$ 197.07

<b>Table 3A-2, ESA Program - CSD Leveraging</b>	
Annual kWh Savings	-
Annual Therm Savings	-
Lifecycle kWh Savings	-
Lifecycle Therm Savings	-
Current kWh Rate	\$ -
Current Therm Rate	\$ -
Average 1st Year Bill Savings / Treated Households	\$ -
Average Lifecycle Bill Savings / Treated Household	\$ -

<b>Table 3A-3, Summary - ESA Program/CSD Leveraging</b>	
Annual kWh Savings	937,231
Annual Therm Savings	31,165
Lifecycle kWh Savings	8,469,747
Lifecycle Therm Savings	181,269
Current kWh Rate	\$ 0.18
Current Therm Rate	\$ 1.08
Average 1st Year Bill Savings / Treated Households	\$ 23.18
Average Lifecycle Bill Savings / Treated Households	\$ 197.07

[1] Summary is the sum of ESA Program + CSD Leveraging

<b>Table 3B, ESA Program - Multifamily Common Area</b>	
Annual kWh Savings	606,876
Annual Therm Savings	1,251
Lifecycle kWh Savings	6,001,703
Lifecycle Therm Savings	44,668
Current kWh Rate	\$0.18
Current Therm Rate	\$1.08
Average 1st Year Bill Savings / Treated Property	\$ 2,414.73
Average Lifecycle Bill Savings / Treated Property	\$ 24,641.26

**Energy Savings Assistance Program Table 4 - Homes/Buildings Treated  
SDG&E  
November 2020**

<b>Table 4A-1, ESA Program</b>						
<b>County</b>	<b>Eligible Households</b>			<b>Households Treated YTD</b>		
	<b>Rural [1]</b>	<b>Urban</b>	<b>Total</b>	<b>Rural</b>	<b>Urban</b>	<b>Total</b>
Orange	0	14,986	<b>14,986</b>	0	280	<b>280</b>
San Diego	6,141	282,825	<b>288,966</b>	250	7,694	<b>7,944</b>
<b>Total</b>	<b>6,141</b>	<b>297,811</b>	<b>303,952</b>	<b>250</b>	<b>7,974</b>	<b>8,224</b>

<b>Table 4B, ESA Program - CSD Leveraging</b>						
<b>County</b>				<b>Households Treated YTD</b>		
				<b>Rural</b>	<b>Urban</b>	<b>Total</b>
Orange						<b>0</b>
San Diego					0	<b>0</b>
<b>Total</b>				<b>0</b>	<b>0</b>	<b>0</b>

<b>Table 4C, ESA Program - Multifamily Common Area</b>						
<b>County</b>	<b>*</b>			<b>Properties Treated YTD</b>		
						<b>Total</b>
-				-	-	<b>Total</b>
Orange	-	-	-	-	-	-
San Diego	-	-	-	-	54	<b>54</b>
<b>Total</b>					<b>54</b>	<b>54</b>

[1] For IOU low income-related and Energy Efficiency reporting and analysis, the Goldsmith definition is applied.

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

\*Do not currently have Eligible Properties for ESA CAM.

**Energy Savings Assistance Program Table 4A-2, Homes Unwilling / Unable to Participate  
SDG&E  
November 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	165	264	0	0	308	1	55
San Diego	6,177	13,775	52	0	7,994	541	897
<b>Total</b>	<b>6,342</b>	<b>14,039</b>	<b>52</b>	<b>0</b>	<b>8,302</b>	<b>542</b>	<b>952</b>

**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  
November 2020**

<b>Table 5A, ESA Program</b>																			
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-Touch	# of Re-treatment	Therm	kWh	kW	
January	32	393	12,547	2	-	-	-	-	-	-	397	0	32	19	13	393	12,944	2	
February	299	2,639	68,573	9	-	-	-	-	70	-	13,798	2	369	203	166	2,639	82,371	11	
March	782	3,423	123,770	16	-	-	-	-	271	-	47,714	7	1,053	770	283	3,423	171,485	23	
April	2,702	209	162,846	22	-	-	-	-	159	-	9,385	1	2,861	865	1,996	209	172,231	23	
May	138	522	15,233	2	-	-	-	-	6	-	2,077	0	144	85	59	522	17,310	2	
June	121	2,007	12,189	2	-	-	-	-	3	-	1,093	0	124	49	75	2,007	13,282	2	
July	301	4,751	45,875	6	-	-	-	-	11	-	2,900	0	312	169	143	4,751	48,775	6	
August	915	4,035	67,648	9	-	-	-	-	36	-	6,255	1	951	434	517	4,035	73,903	10	
September	627	804	74,999	10	-	-	-	-	26	-	7,444	1	653	347	306	804	82,443	11	
October	610	2,329	86,064	12	-	-	-	-	26	-	9,245	1	636	305	331	2,329	95,309	13	
November	1029	10052.64	155024.01	20.36	-	-	-	-	60	0	12154.18	1.618	1,089	528	561	10,053	167,178	22	
December																			
YTD	7,556	31,165	824,769	110	-	-	-	-	668	-	112,462	15	8,224	3,774	4,450	31,165	937,231	125	

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.

<b>Table 5B, ESA Program - CSD Leveraging</b>																			
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.

<b>Table 5C, ESA Program - Multifamily Common Area</b>																		
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	-	-	-	-	-	-	-	-	-	-	0	0	-	0	-	0	-	0
February	4	(174.31)	64,262.63	12.30	-	-	-	-	1	-	6802	2	5	-174	71,065	14		14
March	5	(615.46)	144,491.00	30.84	-	-	-	-	1	-	16209	3	6	-615	160,700	33		33
April	8	(258.96)	64,527.36	11.14	-	-	-	-	-	-	-	-	8	-259	64,527	11		11
May	-	-	-	-	-	-	-	-	-	-	-	-	-	0	-	0		0
June	3	(374.42)	63,636.91	14.70	-	-	-	-	-	-	-	-	3	-374	63,637	15		15
July	10	1,239	68,764	16	-	-	-	-	-	-	-	-	10	1239	68,764	16		16
August	7	(213)	66,301	12	-	-	-	-	-	-	-	-	7	-213	66,301	12		12
September	1	828	1,531	0	-	-	-	-	-	-	-	-	1	828	1,531	0		0
October	3	1,207	5,607	2	-	-	-	-	-	-	-	-	3	1,207	5,607	2		2
November	9	(387)	93,310	19	-	-	-	-	2	-	11,434	2	11	(387)	104,744	21		21
December	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-		-
YTD	50	1,251	572,430	118	-	-	-	-	4	-	34,445	6	54	1,251	606,876	124		124

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.

**Energy Savings Assistance Program Table 6 - Expenditures for Pilots and Studies**  
**SDG&E**  
**November 2020**

	Authorized 2019 Funding [1]			Current Month Expenses			Year to Date Expenses			% of Budget Expended		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
<b>Pilots</b>												
Programmable Communicating Thermostat (PCT) [2] [3]	\$ 25,000	\$ 25,000	\$ 50,000	\$ -	\$ -	\$ -	\$ 18,283	\$ 18,283	\$ 36,565	73%	73%	73%
<b>Total Pilots</b>	<b>\$ 25,000</b>	<b>\$ 25,000</b>	<b>\$ 50,000</b>			<b>\$ -</b>			<b>\$ 36,565</b>	<b>0%</b>	<b>0%</b>	<b>73%</b>
<b>Studies</b>												
Low Income Needs Assessment Study	\$ 8,334	\$ 8,334	\$ 16,667	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Load Impact Evaluation Study	\$ 9,167	\$ 9,167	\$ 18,333	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Equity Criteria and Non Energy Benefits Evaluation (NEB's)	\$ 2,500	\$ 2,500	\$ 5,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Unallocated Funds [4]	\$ (2,917)	\$ (2,917)	\$ (5,834)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
2017 Potential and Goals Study	\$ 5,625	\$ 5,625	\$ 11,250	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Rapid Feedback Research and Analysis [5] [6]	\$ 25,000	\$ 25,000	\$ 50,000	\$ 6,061	\$ 6,061	\$ 12,121	\$ 41,156	\$ 41,156	\$ 82,313	165%	165%	165%
<b>Total Studies</b>	<b>\$ 47,708</b>	<b>\$ 47,708</b>	<b>\$ 95,416</b>	<b>\$ 6,061</b>	<b>\$ 6,061</b>	<b>\$ 12,121</b>	<b>\$ 41,156</b>	<b>\$ 41,156</b>	<b>\$ 82,313</b>	<b>86%</b>	<b>86%</b>	<b>86%</b>

[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.

[2] Programmable Communicating Thermostat (PCT) Pilot budget approved via al 3250-E/2688-G. [Table 1A].

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

[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].

[5] Negative current month expenses due to the transfer of expense to SCG for their share fo the NEB Assesement.

[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 7 (Second Refrigerators, In-Home Education, MyEnergy/My Account Platform)**

**SDG&E  
November 2020**

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

<b>7B - Households Receiving In- Home Energy Education Only</b>		
<b>Measures</b>	<b>Units</b>	<b>Households that Only Received Energy Education</b>
In-Home Education	Home	543

<b>7C - Households for My Energy/My Account Platform - YTD</b>		
<b>Opt-Out</b>	<b>Already Enrolled</b>	<b>Opt-In</b>
8,302	2,004	425

**Energy Savings Assistance Program Table 8 - Contractor Advanced Funding and Repayment**  
**SDG&E**  
**November 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	\$ -				\$ -	\$ -	\$ (86,720)	\$ 907,821
Sep-20	\$ -				\$ -	\$ -	\$ -	\$ 907,821
Oct-20	\$ -				\$ -	\$ -	\$ -	\$ -
Nov-20	\$ -				\$ -	\$ -	\$ -	\$ -
Dec-20	\$ -				\$ -	\$ -	\$ -	\$ -
Total	\$ 1,169,041		40%	\$ -	\$ -	\$ -	\$ (261,220)	\$ 907,821

**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 PPRS earning period will begin December 1, 2020.

[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.

**CARE Table 1 - CARE Program Expenses  
SDG&E  
November 2020**

CARE Program:	Authorized Budget [1] [2]			Current Month Expenses			Year to Date Expenses			% of Budget Spent YTD		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Outreach	\$ 2,928,754	\$ 325,417	\$ 3,254,171	\$ 137,263	\$ 16,965	\$ 154,228	\$ 2,054,845	\$ 265,113	\$ 2,319,957	70%	81%	71%
Processing / Certification Re-certification [3]	\$ 465,490	\$ 51,721	\$ 517,211	\$ 36,065	\$ 4,457	\$ 40,523	\$ 487,980	\$ 61,621	\$ 549,601	105%	119%	106%
Post Enrollment Verification	\$ 327,300	\$ 36,367	\$ 363,667	\$ 9,187	\$ 1,135	\$ 10,323	\$ 119,452	\$ 15,128	\$ 134,580	36%	42%	37%
IT Programming	\$ 1,547,910	\$ 171,990	\$ 1,719,900	\$ 51,942	\$ 6,420	\$ 58,362	\$ 588,830	\$ 75,706	\$ 664,536	38%	44%	39%
Cooling Centers [2]			\$ -	\$ -	\$ -	\$ -	\$ (37,002)	\$ (5,046)	\$ (42,048)	0%	0%	0%
Pilots/CHANGES Program [4]	\$ 240,960	\$ 26,773	\$ 267,733	\$ 19,469	\$ 2,406	\$ 21,875	\$ 205,704	\$ 26,283	\$ 231,987	85%	98%	87%
Studies [5]	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Regulatory Compliance [6]	\$ 273,288	\$ 30,365	\$ 303,653	\$ 27,892	\$ 3,447	\$ 31,340	\$ 429,099	\$ 52,044	\$ 481,143	157%	171%	158%
General Administration	\$ 752,622	\$ 83,625	\$ 836,246	\$ 64,026	\$ 7,913	\$ 71,939	\$ 467,148	\$ 58,929	\$ 526,077	62%	70%	63%
CPUC Energy Division [7]	\$ 52,067	\$ 5,785	\$ 57,852	\$ -	\$ -	\$ -	\$ 71,067	\$ 8,988	\$ 80,055	136%	155%	138%
<b>SUBTOTAL MANAGEMENT COSTS</b>	<b>\$ 6,588,390</b>	<b>\$ 732,043</b>	<b>\$ 7,320,433</b>	<b>\$ 345,844</b>	<b>\$ 42,745</b>	<b>\$ 388,588</b>	<b>\$ 4,387,123</b>	<b>\$ 558,766</b>	<b>\$ 4,945,890</b>	<b>67%</b>	<b>76%</b>	<b>68%</b>
CARE Rate Discount [8]	\$ 107,779,365	\$ 14,644,166	\$ 122,423,531	\$10,195,208	\$1,297,852	\$ 11,493,060	\$112,853,300	\$14,333,715	\$ 127,187,015	105%	98%	104%
<b>TOTAL PROGRAM COSTS &amp; CUSTOMER DISCOUNTS</b>	<b>\$ 114,367,755</b>	<b>\$ 15,376,209</b>	<b>\$ 129,743,964</b>	<b>\$ 10,541,051</b>	<b>\$ 1,340,597</b>	<b>\$ 11,881,648</b>	<b>\$ 117,240,423</b>	<b>\$ 14,892,482</b>	<b>\$ 132,132,905</b>	<b>103%</b>	<b>97%</b>	<b>102%</b>
Other CARE Rate Benefits												
- DWR Bond Charge Exemption				\$717,885		\$ 717,885	\$7,854,347		\$ 7,854,347			
- CARE Surcharge Exemption				\$878,757	\$ 103,700	\$ 982,457	\$9,614,439	\$ 1,185,393	\$ 10,799,832			
- California Solar Initiative Exemption				\$0		\$ -	\$0		\$ -			
- kWh Surcharge Exemption				\$90,272		\$ 90,272	\$927,338		\$ 927,338			
- Vehicle Grid Integration Exemption				\$82,189		\$ 82,189	\$872,950		\$ 872,950			
Total Other CARE Rate Benefits				<b>\$1,769,103</b>	<b>\$ 103,700</b>	<b>\$ 1,872,803</b>	<b>\$19,269,074</b>	<b>\$ 1,185,393</b>	<b>\$ 20,454,467</b>			
Indirect Costs				\$ 70,317	\$ 8,691	\$ 79,008	\$ 717,337	\$ 90,784	\$ 808,122			

[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.

[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.

[3] Includes additional training hours for Envision and unbudgeted transfers from Customer Call Center.

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

[5] Reflects the Annual Eligibility Estimates prepared by Athens Research on behalf of the utilities. This effort was formerly referenced as Measurement and Evaluation.

[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%.

[7] Includes additional Energy Division Staff employee benefit expenses not included in the authorized budget.

[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.

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

**CARE Table 2 - Enrollment, Recertification, Attrition, & Penetration<sup>5</sup>**  
**SDG&E**  
**November 2020**

	New Enrollment										Recertification				Attrition (Drop Offs)					Enrollment		Total CARE Participants	Estimated CARE Eligible <sup>5</sup>	Penetration Rate % (W/X)	
	Automatic Enrollment				Self-Certification (Income or Categorical)						Total New Enrollment (E+J)	Scheduled	Non-Scheduled (Duplicates)	Automatic	Total Recertification (L+M+N)	No Response <sup>4,5</sup>	Failed <sup>5,6,7</sup> PEV	Failed Recertification <sup>5</sup>	Other	Total Attrition (P+Q+R+S)	Gross (K+O)				Net Adjusted (K-T)
	Inter-Utility <sup>1</sup>	Intra-Utility <sup>2</sup>	Leveraging <sup>3</sup>	Combined (B+C+D)	Online	Paper	Phone	Capitation	Combined (F+G+H+I)																
<b>January</b>	70	172	0	242	4,366	1,306	343	246	6,261	6,503	3,911	3,619	4,130	11,660	1,443	66	171	5,603	7,283	18,163	-780	300,720	302,245	99%	
<b>February</b>	0	146	0	146	4,476	978	245	244	5,943	6,089	1,917	2,860	4,160	8,937	1,672	77	153	1,666	3,568	15,026	2,521	303,241	302,245	100%	
<b>March</b>	0	79	0	79	7,039	1,300	631	238	9,208	9,287	2,067	2,409	2,298	6,774	64	9	42	3,006	3,121	16,061	6,166	309,407	302,245	102%	
<b>April</b>	0	36	0	36	6,927	1,137	712	216	8,992	9,028	220	665	216	8,85	398	8	9	2,351	2,766	9,913	6,262	315,669	302,245	104%	
<b>May</b>	17	6	0	23	6,393	1,289	1,085	213	8,980	9,003	13	583	0	596	0	0	0	2,242	2,242	9,599	6,761	322,430	302,245	107%	
<b>June</b>	152	22	0	174	5,277	717	494	165	6,653	6,827	10	434	1	445	0	0	1	2,977	2,978	7,272	3,849	326,279	302,245	108%	
<b>July</b>	48	32	0	80	4,872	738	444	176	6,230	6,310	42	483	176	525	0	1	0	3,328	3,329	6,835	2,981	329,260	302,245	109%	
<b>August</b>	36	36	0	72	4,268	512	512	130	5,422	5,494	38	520	0	558	0	0	0	3,305	3,305	6,052	2,189	331,449	302,245	110%	
<b>September</b>	13	50	0	63	4,122	561	285	138	5,106	5,169	2	522	0	524	0	0	0	3,454	3,454	5,693	1,715	333,164	302,245	110%	
<b>October</b>	24	103	0	127	3,447	362	220	148	4,177	4,304	49	530	0	579	0	0	0	2,974	2,974	4,883	1,330	334,494	302,245	111%	
<b>November</b>	26	69	0	95	2,630	282	228	96	3,236	3,331	2	503	0	505	0	0	0	2,734	2,734	3,836	597	335,091	302,245	111%	
<b>December</b>	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%
<b>YTD Total</b>	<b>386</b>	<b>751</b>	<b>0</b>	<b>1,137</b>	<b>53,817</b>	<b>9,182</b>	<b>5,199</b>	<b>2,010</b>	<b>70,208</b>	<b>71,345</b>	<b>8,271</b>	<b>13,128</b>	<b>10,589</b>	<b>31,988</b>	<b>3,577</b>	<b>161</b>	<b>376</b>	<b>33,640</b>	<b>37,754</b>	<b>103,333</b>	<b>33,591</b>	<b>335,091</b>	<b>302,245</b>	<b>111%</b>	

<sup>1</sup> Enrollments via data sharing between the IOUs.

<sup>2</sup> Enrollments via data sharing between departments and/or programs within the utility.

<sup>3</sup> Enrollments via data sharing with programs outside the IOU that serve low-income customers.

<sup>4</sup> No response includes no response to both Recertification and Verification.

<sup>5</sup> 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.

<sup>6</sup> 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.

<sup>7</sup> 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.

**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**  
**November 2020**

Month	Total CARE Households Enrolled	Households Requested to Verify <sup>1</sup>	% of CARE Enrolled Requested to Verify Total	CARE Households De-enrolled (Due to no response)	CARE Households De-enrolled (Verified as Ineligible) <sup>2</sup>	Total Households De-enrolled <sup>3,5</sup>	% De-enrolled through Post Enrollment Verification <sup>4</sup>	% of Total CARE Households De-enrolled
January	300,720	533	0.2%	8	53	61	11.4%	0.0%
February	303,241	179	0.1%	3	13	16	8.9%	0.0%
March	309,407	26	0.0%	0	2	2	7.7%	0.0%
April	315,669	0	0.0%	0	0	0	0.0%	0.0%
May	322,430	0	0.0%	0	0	0	0.0%	0.0%
June	326,279	0	0.0%	0	0	0	0.0%	0.0%
July	329,260	1	0.0%	0	0	0	0.0%	0.0%
August	331,449	1	0.0%	0	1	1	100.0%	0.0%
September	333,164	0	0.0%	0	0	0	0.0%	0.0%
October	334,494	0	0.0%	0	0	0	0.0%	0.0%
November	335,091	0	0.0%	0	0	0	0.0%	0.0%
December	0					0	0.0%	0.0%
<b>YTD Total</b>	<b>335,091</b>	<b>740</b>	<b>0.2%</b>	<b>11</b>	<b>69</b>	<b>80</b>	<b>10.8%</b>	<b>0.0%</b>

<sup>1</sup> Includes all customers who failed SDG&E's CARE eligibility probability model.

<sup>2</sup> Includes customers verified as over income or who requested to be de-enrolled.

<sup>3</sup> Verification results are tied to the month initiated and the verification process allows customers 90 days to respond to the verification request.

<sup>4</sup> Percentage of customers dropped compared to the total participants requested to provide verification in that month.

<sup>5</sup> 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.

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

**CARE Table 3B Post-Enrollment Verification Results (Electric only High Usage)**  
**SDG&E**  
**November 2020**

Month	Total CARE Households Enrolled	Households Requested to Verify <sup>1</sup>	% of CARE Enrolled Requested to Verify Total	CARE Households De-enrolled (Due to no response) <sup>2</sup>	CARE Households De-enrolled (Verified as Ineligible) <sup>2</sup>	Total Households De-enrolled <sup>2,3,5</sup>	% De-enrolled through Post Enrollment Verification <sup>4</sup>	% of Total CARE Households De-enrolled
January	300,720	238	0.1%	38	14	52	21.8%	0.0%
February	303,241	147	0.0%	2	1	3	2.0%	0.0%
March	309,407	47	0.0%	0	0	0	0.0%	0.0%
April	315,669	14	0.0%	0	0	0	0.0%	0.0%
May	322,430	1	0.0%	0	0	0	0.0%	0.0%
June	326,279	0	0.0%	0	0	0	0.0%	0.0%
July	329,260	4	0.0%	0	0	0	0.0%	0.0%
August	331,449	2	0.0%	1	0	1	50.0%	0.0%
September	333,164	6	0.0%	3	0	3	50.0%	0.0%
October	334,494	2	0.0%	0	0	0	0.0%	0.0%
November	335,091	2	0.0%	0	1	1	50.0%	0.0%
December						0	0.0%	0.0%
<b>YTD Total</b>	<b>335,091</b>	<b>463</b>	<b>0.1%</b>	<b>44</b>	<b>16</b>	<b>60</b>	<b>13.0%</b>	<b>0.0%</b>

<sup>1</sup> Includes all participants who were selected for high usage verification process.

<sup>2</sup> Includes customers verified as over income, who requested to be de-enrolled, did not reduce usage, or did not agree to be weatherized.

<sup>3</sup> 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.

<sup>4</sup> Percentage of customers dropped compared to the total participants requested to provide verification in that month.

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

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

**CARE Table 4 - CARE Self-Certification and Self-Recertification Applications<sup>1</sup>**  
**SDG&E**  
**November 2020**

	Provided	Received	Approved	Denied	Pending/Never Completed	Duplicates
Total (Y-T-D)	5,946	128,307	71,857	18,011	218	38,221
Percentage		100%	51%	15%	0%	34%

<sup>1</sup> Includes sub-metered.

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

**CARE Table 5 - Enrollment by County  
SDG&E  
November 2020**

County	Estimated Eligible Households[1]			Total Households Enrolled[2]			Penetration Rate		
	Urban	Rural	Total	Urban	Rural[3]	Total	Urban	Rural	Total
Orange	14,908	0	14,908	14,592	0	14,592	98%	NA	98%
San Diego	281,284	6,053	287,337	313,138	7,361	320,499	111%	122%	112%
<b>Total</b>	<b>296,192</b>	<b>6,053</b>	<b>302,245</b>	<b>327,730</b>	<b>7,361</b>	<b>335,091</b>	<b>111%</b>	<b>122%</b>	<b>111%</b>

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

<sup>2</sup> Total Households Enrolled includes submeter tenants.

<sup>3</sup> 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  
November 2020**

Month	Total CARE Households	Households Requested to Recertify <sup>1,5</sup>	% of Households Total (C/B)	Households Recertified <sup>2</sup>	Households De-enrolled <sup>3</sup>	Recertification Rate % <sup>4</sup> (E/C)	% of Total Households De-enrolled (F/B)
January	300,720	2,278	0.8%	2,075	102	91.1%	0.0%
February	303,241	1,232	0.4%	1,122	26	91.1%	0.0%
March	309,407	346	0.1%	299	3	86.4%	0.0%
April	315,669	0	0.0%	0	0	0.0%	0.0%
May	322,430	0	0.0%	0	0	0.0%	0.0%
June	326,279	5	0.0%	0	0	0.0%	0.0%
July	329,260	1	0.0%	0	0	0.0%	0.0%
August	331,449	3	0.0%	0	0	0.0%	0.0%
September	333,164	1	0.0%	0	0	0.0%	0.0%
October	334,494	0	0.0%	0	0	0.0%	0.0%
November	335,091	1	0.0%	0	0	0.0%	0.0%
December							
<b>YTD</b>	<b>335,091</b>	<b>3,867</b>	<b>1.2%</b>	<b>3,496</b>	<b>131</b>	<b>90.4%</b>	<b>0.0%</b>

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

<sup>2</sup> Data represents total residential electric customers.

<sup>3</sup> Includes customers who did not respond or who requested to be de-enrolled.

<sup>4</sup> Percentage of customers recertified compared to the total participants requested to recertify in that month.

<sup>5</sup> Customers can manually request to recertify but are automatically placed in the COVID protection category.

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



**CARE Table 7 - Capitation Contractors<sup>1</sup>**  
**SDG&E**  
**November 2020**

Contractor	Contractor Type (Check one or more if applicable)				Total Enrollments	
	Private	CBO	WMDVBE	LIHEAP	Current Month	Year-to-Date
211 SAN DIEGO		X			80	1426
211 ORANGE COUNTY		X			-	-
ALLIANCE FOR AFRICAN ASSISTANCE		X			-	2
AMERICAN RED CROSS WIC OFFICES		X	X		-	4
CATHOLIC CHARITIES		X			-	-
CHULA VISTA COMMUNITY COLLABORATIVE		X			-	5
COMMUNITY RESOURCE CENTER		X			-	6
HEARTS AND HANDS WORKING TOGETHER		X			-	-
HOME START		X			-	-
HORN OF AFRICA		X			-	-
INTERFAITH COMMUNITY SERVICES		X			2	2
LA MAESTRA FAMILY CLINIC		X		X	-	0
MAAC PROJECT		X			-	14
NEIGHBORHOOD HEALTH CARE	X				-	2
NORTH COUNTY HEALTH SERVICES		X			-	3
SAN DIEGO STATE UNIVERSITY WIC OFFICES		X			1	11
SAN YSIDRO HEALTH CENTERS		X			1	12
SCRIPPS HEALTH WIC		X			-	3
UNION OF PAN ASIAN COMMUNITIES SAN DIEGO(UPAC)		X			-	-
VISTA COMMUNITY CLINIC		X			-	1
<b>Total Enrollments</b>					<b>84</b>	<b>1,491</b>

<sup>1</sup> 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

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

Month	Gas and Electric	Gas Only	Electric Only	Total	Eligible Households <sup>1</sup>	Penetration	% Change	Total Residential Accounts <sup>2</sup>
January	189,019	0	113,159	302,178	302,245	100%	0.2%	1,340,880
February	189,690	0	113,551	303,241	302,245	100%	0.2%	1,342,800
March	193,887	0	115,520	309,407	302,245	102%	0.2%	1,344,566
April	197,949	0	117,720	315,669	302,245	104%	0.2%	1,345,843
May	202,455	0	119,975	322,430	302,245	107%	0.2%	1,347,323
June	204,858	0	121,421	326,279	302,245	108%	0.2%	1,349,282
July	206,807	0	122,453	329,260	302,245	109%	0.2%	1,350,885
August	208,399	0	123,050	331,449	302,245	110%	0.2%	1,352,376
September	209,559	0	123,605	333,164	302,245	110%	0.2%	1,353,996
October	210,477	0	124,017	334,494	302,245	111%	0.2%	1,355,947
November	210,910	0	124,181	335,091	302,245	111%	0.2%	1,357,108
December								
<b>YTD</b>	<b>210,910</b>	<b>N/A</b>	<b>124,181</b>	<b>335,091</b>	<b>302,245</b>	<b>111%</b>	<b>0.2%</b>	<b>1,357,108</b>

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

<sup>2</sup> 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<sup>1</sup>**  
**SDG&E**  
**November 2020**

2020	Authorized 2020 Budget <sup>2</sup>	Current Month Expenses	Expenses Since Jan. 1, 2020	% of 2020 Budget Expended
	Total	Total	Total	Total
CHANGES Program	\$ 267,733	\$ 21,875	\$ 231,987	87%
<b>Total</b>	<b>\$ 267,733</b>	<b>\$ 21,875</b>	<b>\$ 231,987</b>	<b>87%</b>

1. Decision 15-12-047 transitioned CHANGES pilot to CHANGES program and funding for the effort is captured herein.
2. Corrected budget from \$265,103 to \$267,733, as the previous budget amount is for PY2019.

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

<b>CARE Table 10 CHANGES One-On-One Customer Assistance Sessions San Diego Gas &amp; Electric Reporting Period October 2020<sup>[1]</sup></b>	
<b>No. of attendees at education sessions</b>	<b>107</b>
<b>Disputes</b>	
Add Level Pay Plan	0
Assisted with CARE Re-Certification/Audit	0
Changed 3rd party Company/Gas Aggregation	0
Changed 3rd Party Electricity Aggregation	0
Enroll in Energy Assistance Programs	0
High Energy CARE User	0
Medical Baseline Application	0
Payment Extension	0
Payment Plan	0
Request Bill Adjustment	0
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
<b>Total disputes [3]</b>	<b>0</b>

<b>Needs Assistance</b>	
Add/Remove Level Pay Plan	0
CARE Enrollment	0
Assisted with CARE Re-Certification/Audit	0
Assisted with Changes to Account	1
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	0
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
<b>Total Needs Assistance [2]</b>	<b>7</b>

**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/](http://consumers.cpuc.ca.gov/team_and_changes/)

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

[1] There is a one-month lag behind the current reporting month. The data for November 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 <sup>3</sup>	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) <sup>4</sup>	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.