

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

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

And Related Matters.

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

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

**MONTHLY REPORT OF SAN DIEGO GAS & ELECTRIC COMPANY (U 902 M) ON
LOW-INCOME ASSISTANCE PROGRAMS FOR FEBRUARY 2021**

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March 22, 2021

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This is the second monthly report for program year (PY) 2021. The purpose of this report is to consolidate activity for the California Alternate Rates for Energy (CARE) Program and Energy Savings Assistance (ESA) Program and provide the California Public Utilities Commission's Energy Division with information to assist in analyzing the low-income programs.

This report presents year-to-date ESA Program and CARE Program results and expenditures through February 28, 2021 for San Diego Gas & Electric Company.

Respectfully Submitted,

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San Diego Gas & Electric Company

Energy Savings Assistance (ESA) Program

And

California Alternate Rates for Energy (CARE)

Program

TABLE OF CONTENTS

1.	ESA PROGRAM EXECUTIVE SUMMARY	1
	1.1 <i>ESA Program Overview</i>	1
	1.2 <i>ESA Program Customer Outreach and Enrollment Update</i>	3
	1.3 <i>Leveraging Success Evaluation, Including CSD</i>	12
	1.4 <i>Workforce Education & Training (WE&T)</i>	14
	1.5 <i>Miscellaneous</i>	15
2.	CARE EXECUTIVE SUMMARY	16
	2.1 <i>CARE Program Summary</i>	16
	2.2 <i>Outreach</i>	17
	2.3 <i>CARE Recertification Complaints</i>	20
3.	CHANGES REPORTING	21
4.	APPENDIX A – ESA AND CARE PROGRAM TABLES	22

ENERGY SAVINGS ASSISTANCE PROGRAM MONTHLY REPORT

1. ESA PROGRAM EXECUTIVE SUMMARY

1.1 ESA Program Overview

In Guidance Decision 19-06-022, the Commission authorized CARE and ESA Program bridge funding up to 2020 program year levels for the first six months of 2021 and up to a year if the Commission had not approved applications for PY 2021 by November 16, 2020.¹ Subsequently, the Commission issued D.20-08-033 to modify certain bridge funding requirements. In compliance with D.20-08-033, SDG&E filed Advice Letter 3612-E/2905-G (ESA Bridge Funding AL) with a proposed ESA Program bridge funding budget and retreatment goal for the January 1, 2021 through June 30, 2021 bridge period.² The ESA Bridge Funding AL was approved by the Commission's Energy Division effective September 23, 2020. In addition, D.19-06-022 automatically authorizes CARE Program activity for January through June 2021 without the need for prior advice letter approval. Accordingly, the authorized program budgets and homes treated goals in this monthly report reflect the six-month bridge period and will be revised once the Commission approves the utility applications for 2021 and beyond or authorizes bridge funding for the second half of 2021,³ whichever occurs first.

¹ D.19-06-022 at 12.

² SDG&E Advice Letter 3612-E/2905-G was approved by the Commission's Energy Division effective September 23, 2020.

³ "If the Commission hasn't voted on the applications by May 16, 2021, and the large IOU has met the interim progress milestone, an extension of ESA bridge funding for six-months through the end of 2021, at the same budget level and retreatment goal as for the first six-month bridge, is authorized" pending Energy Division approval of a tier 1 AL submitted by each IOU demonstrating achievement of the budget and retreatment goals for the January through June 2021 bridge period. D.19-06-022 at 13.

COVID-19 Program Impacts

On October 30, 2020, SDG&E notified its ESA contractors and Energy Division that the Pandemic Return to Service (PPRS) credit earning period would begin on December 1, 2020 and end on May 31, 2021.⁴ SDG&E has five contractors who accepted advance payments and are eligible to earn PPRS credits. As of February, two ESA contractors have earned the full PPRS eligible amounts, with the remaining ESA contractors on track to earn the full PPRS credit amount by the end of the PPRS credit earning period.

In February 2021, 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 are primarily enrolling in person, with less than 1% of enrollments occurring via telephone enrollment efforts. All ESA Program contractors are fully operational, and no COVID-19 related issues were reported in the month of February 2021.

⁴ 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.

ESA Program Summary through February 2021			
	2021 Authorized / Planning Assumptions⁵	Actual to Date⁶	%
Budget	\$16,460,022	\$2,008,651	12%
Homes Treated ⁷	5,973	698	12%
kWh Saved	N/A	137,646	N/A
kW Demand Reduced	N/A	17	N/A
Therms Saved	N/A	3,425	N/A
GHG Emissions Reduced (Tons)	N/A	96	N/A

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 February.

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

ESA Program Contractor Outreach

In February, SDG&E’s largest O&A contractor reported improved outreach and enrollment efforts to support ESA Program enrollments. In February, 496 ESA enrollments were received through canvassing efforts, which is a 41% increase

⁵ ESA budget and homes treated reflect those authorized in SDG&E ESA Bridge Funding Advice Letter 3612-E/2905-G, effective September 23, 2020. For the bridge funding period, all other categories reflect “N/A.”

⁶ 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.

⁷ Total homes treated reflects homes that have been invoiced and paid. There was no CSD leveraging.

over prior month activity. 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. Overall, ESA Program marketing, education, and outreach efforts were successful in creating 2,629 leads and 1,028 enrollments for the month of February.

ESA Program Multifamily Common Area Measure (MF CAM) Initiative

In February 2021, 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. In February, zero properties were treated, but seven properties are currently receiving measure installations. In addition, there are a total of eight properties pending energy assessments/audits.

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 February, two customers were served by the Language Line.

Language	Calls
Mandarin	2
TOTAL	2

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 2021 campaign is to make a connection with customers in order to drive conservation and provide monthly savings on their energy bill. The campaign will run in English, Spanish and Asian languages and may include television, streaming radio, outdoor, print, digital (including paid search), email, direct mail and bill inserts, as well as a robust outreach program. As the COVID-19 pandemic progresses, SDG&E will continue to monitor any changes that may affect ME&O efforts.

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 February 2021 are summarized in the following sections:

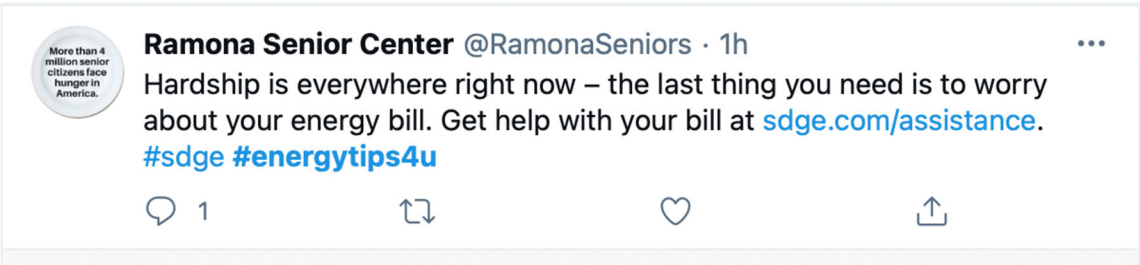
Online Advertising

In February 2021, SDG&E continued to run paid search and re-targeted banner ads. Paid Search garnered 28,854 impressions with a click-through-rate (CTR) of

19 percent (%). Retargeting banner display ads received 1,500,088 impressions with a CTR of 0.74%. 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 78 customer assistance messages in February to an audience of more than 94,000 followers. SDG&E’s social media profile also posts messaging to an audience of more than 50,000 followers. These messages are then able to be redistributed to other networks on social media.





ElderHelp of San Diego @ElderHelpSD · 21h



The pandemic has brought hardship in many ways, including the struggle to pay energy bills.

Do you need help with your SDG&E bill? You may qualify for financial assistance. Learn more at sdge.com/AMP. #sdge #energytips4u



Direct Marketing

In February 2021, direct marketing efforts included the following tactics:

Direct Mail

SDG&E continued direct mail efforts and sent 8,639 postcards to promote the ESA Program to potential customers. The postcard encourages customers to contact an authorized ESA Program outreach contractor for more information and/or to schedule an appointment.

Email

SDG&E sent an e-mail to promote the ESA Program to potential customers, which was sent to 98,181 customers with a 24% Open Rate and 2.65% CTR.

Live CARE Call Campaign

SDG&E's third-party contractor, The Harris Group (THG), called targeted customers to enroll in the CARE Program.⁸ 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 February 2021 generated the following numbers:

The Harris Group	
ESA Leads	0
CARE Enrollments	2,017
CARE Recertifications ⁹	5

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

⁸ THG is a Diverse Business Enterprise (DBE) vendor and a woman-owned business.

⁹ Since March 4, 2020, no customers are required to recertify due to customer protections established in Resolutions M-4842 and M-4849. Accordingly, SDG&E has not removed any customers from the CARE program resulting from recertification/failure to recertify. Customers can manually request to recertify but are automatically placed in the COVID protection category.

serving customers that are multicultural/multilingual, seniors, veterans, special needs, and 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 February 2021, SDG&E’s partner outreach activities resulted in the following activities:

Energy Solutions Partner Network	
ESA Leads	0
CARE Enrollments	3
CARE Recertifications ¹⁰	2

Partner Spotlight

In February 2021, the SDG&E Customer Solutions Outreach Team participated in eight virtual events, presentations, and trainings/workshops 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 while following COVID-19 social distancing guidelines. Outreach activities were focused on engaging customers with solutions such as the CARE and ESA Programs and reached over 2,100 people.

¹⁰ *Id.*

Energy Solutions Partner Activities

Home Start

On February 24, SDG&E participated in a food distribution event in Southeast San Diego hosted by Home Start, an organization dedicated to assuring the safety and resiliency of children by strengthening families and their communities.

During this event, families received food assistance and take home resources, which included SDG&E customer assistance information.

Black American Political Association of California

On February 25, SDG&E Outreach presented information about SDG&E's low-income programs to a group from the San Diego Chapter of the Black American Political Association of California (BAPAC), which ensures the economic, social, and political force of the Black community in San Diego County remains relevant. This team of attendees assist the community during the challenges of COVID-19 and deliver resources and information to struggling customers in the San Diego area.

Multicultural Outreach

To continue efforts to reduce potential barriers and increase education and program enrollments for customers in the rural, multicultural/multilingual, and special needs segments, 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 February 2021, 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 low-income 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, 2020, SDG&E closed the branch offices to the public due to the COVID-19 pandemic. Branch offices are still accepting CARE applications at the building drop box but

have yet to reopen in 2021. 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 February 2021, SDG&E’s CCC and Branch Office generated the following applications and leads over the telephone:

	CCC	Branch Office
ESA Leads	18	0
CARE Enrollments	13	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 (GRID) to enroll customers in the ESA Program based on participation in the SASH Program. Once approved, contractors install all feasible ESA Program measures in the home prior to the SASH Program’s installation of a solar system. In December 2020, SDG&E reached out to GRID for a status update on the bi-annual process for this activity, however no additional list has been received as of February 2021.

Additionally, SDG&E and GRID have finalized a Non-Disclosure Agreement (NDA) for annual data sharing efforts to be conducted for the DAC-SASH program in compliance with D.20-12-003. In February, SDG&E completed and submitted the initial data request to GRID in compliance with the decision.

Furthermore, D.16-11-022 required the utilities to provide GRID with information on CARE High Energy Usage (HEU) customers who have participated in the ESA Program. The Non-Disclosure Agreement (NDA) for this effort expired on December 31, 2020. To continue compliance with this directive, SDG&E has updated and finalized the NDA and anticipates finalization in March 2021. Once the new NDA is executed, SDG&E will retroactively submit all CARE HEU leads to GRID in compliance with the directive.

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. The original agreement was in effect until the sooner of December 31, 2020 or until SDCWA's funds are exhausted. In February, SDG&E received an updated agreement to continue its partnership in 2021.

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, MAAC and Campesinos Unidos, continued enrollment efforts. LIHEAP agencies have also received additional payment assistance funding, which is expected to increase the leveraging opportunities between the two programs. In February, LIHEAP organizations generated 98 leads for the ESA Program and enrolled 60 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 in-person training in conjunction with WE&T efforts in February 2021. WE&T online courses are available for contractors via SDG&E's website and email distributions, of which contractors are informed.

SDG&E is also in the process of developing an online training platform for contractor education which will provide consistent Outreach and Assessment training for ESA Program contractors. SDG&E anticipates having a module in place mid-2021.

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. The selected consultant for the 2022 LINA is Evergreen Economics. The project commenced in January 2021. In February, the study team refined the sampling plan and work scope. A public webinar for the draft research plan was scheduled for March 5, 2021. The study is expected to be complete by December 2022.

Non Energy Benefits (NEB) Assessment

The NEB study was presented to stakeholders and completed in January 2021. On February 5, a link to the final version of the study and a memorandum from the Investor-Owned Utilities (IOUs) illustrating the impact of the study results on program year 2019 NEB values was served on the low-income service lists.

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 ¹¹	Actual Expenses to Date	% of Budget Spent
Outreach	\$1,627,086	\$173,617	11%
Proc., Certification and Verification	\$258,606	\$131,326	51%
Post Enrollment Verification ¹²	\$181,833	\$(34,175)	-19%
Information Tech./Programming	\$859,950	\$37,523	4%
Pilots-CHANGES	\$133,866	\$13,750	10%
Regulatory Compliance	\$151,826	\$52,452	35%
General Administration	\$418,123	\$79,792	19%
CPUC Energy Division Staff	\$28,926	\$19,680	68%
Cooling Centers ¹³	\$0	\$0	0%
Total Expenses	\$3,660,217	\$473,966	13%
Subsidies and Benefits ¹⁴	\$72,736,422	\$27,566,648	38%
Total Program Costs and Discounts	\$76,396,638	\$28,040,614	37%

¹¹ Guidance Decision 19-06-022 authorizes CARE funding up to 2020 levels for the six-month bridge period of January through June 2021. Accordingly, administrative expenses are half of those approved for program year 2020.

¹² Negative amount due to reclassification of labor costs within CARE Program from Post-Enrollment Verification category to Processing, Certification, and Verification.

¹³ The funding for SDG&E's Cool Zones is no longer under the CARE Program. See D.17-12-009 at Ordering Paragraph 114.

¹⁴ Reflects Subsidies and Benefits as authorized in Advice Letter 3620-E, effective February 1, 2021, and Advice Letter 2923-G, effective January 1, 2021.

2.1.2 Provide the CARE Program penetration rate to date.

CARE Penetration		
Participants Enrolled	Eligible Participants¹⁵	Penetration Rate
343,623	293,584	117%

2.2 Outreach

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

In February 2021, marketing and outreach efforts generated 3,090 completed CARE applications and 1,958 new enrollments/recertifications for the program.

Below is a summary of CARE specific outreach efforts.

Direct Marketing

Direct Mail

In February 2021, SDG&E continued the bill comparison campaign by mailing a comparison letter to 8,054 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.

¹⁵ On February 12, 2021, Pacific Gas and Electric Company (PG&E), on behalf of the IOUs, filed the Annual Estimates of CARE Eligible Customers and Related Information. This number reflects estimates of SDG&E's CARE Eligible Participants for 2021, as reflected in filing A.14-11-007, et al., Annual CARE Eligibility Estimates.

Email

In February 2021, 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 February 2021, SDG&E sent out 227,984 emails (many of these reminders) which generated a 33% 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 18 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 (collectively, Capitation Agencies). 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 February, the following numbers were generated by the Capitation Agencies:

Capitation Agencies	
ESA Leads	68
CARE Enrollments	48
CARE Recertifications ¹⁶	0

Cool Zones

The San Diego County Cool Zone program is generally active between May through October of each year and is expected to resume in May of 2021.

Women’s Infant & Children Organizations

In February, 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 February 2021, the following applications were received:

¹⁶ Since March 4, 2020, no customers are required to recertify due to customer protections established in Resolution M-4842 and M-4849. Accordingly, SDG&E has not removed any customers from the CARE program resulting from recertification/failure to recertify. Customers can manually request to recertify but are automatically placed in the COVID protection category.

HHSA	February	YTD
ESA Leads	0	0
CARE Enrollments	52	105
CARE Recertifications ¹⁷	53	58

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 February 2021, SDG&E did not receive any customer complaints regarding CARE recertification.

¹⁷ Since March 4, 2020, no customers are required to recertify due to customer protections established in Resolution M-4842 and M-4849. Accordingly, 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 January 2021. 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 Q3 December 2020-February 2021, CARE Table 11 data, will be sent by CHANGES and reported in a subsequent report.¹⁸

¹⁸ 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

ESA Program – Table 8 – Contractor Advanced Funding and Repayment

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**

February 2021

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	\$ 591,000	\$ 143,000	\$ 734,000	\$ 51,567	\$ 11,413	\$ 62,980	\$ 95,736	\$ 25,047	\$ 120,783	16%	18%	16%
Domestic Hot Water	\$ 21,750	\$ 703,250	\$ 725,000	\$ 3,161	\$ 102,197	\$ 105,357	\$ 5,078	\$ 164,184	\$ 169,261	23%	23%	23%
Enclosure	\$ 879,780	\$ 1,166,220	\$ 2,046,000	\$ 96,214	\$ 127,539	\$ 223,753	\$ 154,799	\$ 205,198	\$ 359,997	18%	18%	18%
HVAC	\$ 256,000	\$ 1,000,000	\$ 1,256,000	\$ 32,447	\$ 223,229	\$ 255,676	\$ 40,924	\$ 338,857	\$ 379,781	16%	34%	30%
Maintenance	\$ 7,845	\$ 110,000	\$ 117,845	\$ 1,957	\$ (4,667)	\$ (2,710)	\$ 2,177	\$ 7,647	\$ 9,825	28%	7%	8%
Lighting	\$ 1,800,000	\$ -	\$ 1,800,000	\$ 198,034	\$ -	\$ 198,034	\$ 329,016	\$ -	\$ 329,016	18%	0%	18%
Miscellaneous	\$ 259,000	\$ -	\$ 259,000	\$ 34,182	\$ -	\$ 34,182	\$ 62,299	\$ -	\$ 62,299	24%	0%	24%
Customer Enrollment	\$ 785,000	\$ 785,000	\$ 1,570,000	\$ 44,944	\$ 44,944	\$ 89,889	\$ 111,542	\$ 111,542	\$ 223,084	14%	14%	14%
In Home Education	\$ 145,000	\$ 145,000	\$ 290,000	\$ 6,148	\$ 6,148	\$ 12,297	\$ 19,129	\$ 19,129	\$ 38,258	13%	13%	13%
Contractor Advanced Funds [3]	\$ -	\$ -	\$ -	\$ (172,622)	\$ (172,622)	\$ (345,244)	\$ (182,622)	\$ (182,622)	\$ (365,245)	0%	0%	0%
Pilot	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Energy Efficiency TOTAL [4]	\$ 4,745,375	\$ 4,052,470	\$ 8,797,845	\$ 296,032	\$ 338,182	\$ 634,214	\$ 638,078	\$ 688,982	\$ 1,327,059	13%	17%	15%
Training Center	\$ 42,500	\$ 42,500	\$ 85,000	\$ 1,809	\$ 1,809	\$ 3,617	\$ 3,094	\$ 3,094	\$ 6,188	0%	0%	0%
Inspections	\$ 40,000	\$ 40,000	\$ 80,000	\$ 3,531	\$ 3,531	\$ 7,062	\$ 5,965	\$ 5,965	\$ 11,930	15%	15%	15%
Marketing and Outreach	\$ 235,000	\$ 235,000	\$ 470,000	\$ (33,846)	\$ (33,846)	\$ (67,692)	\$ (26,970)	\$ (26,970)	\$ (53,941)	-11%	-11%	-11%
Statewide Marketing Education and Outreach	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Studies	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Regulatory Compliance	\$ 77,250	\$ 77,250	\$ 154,500	\$ (31,594)	\$ (31,594)	\$ (63,188)	\$ (16,247)	\$ (16,247)	\$ (32,493)	-21%	-21%	-21%
General Administration	\$ 558,367	\$ 558,367	\$ 1,116,734	\$ 173,342	\$ 173,342	\$ 346,684	\$ 270,020	\$ 270,020	\$ 540,039	48%	48%	48%
CPUC Energy Division	\$ 12,500	\$ 12,500	\$ 25,000	\$ 3,192	\$ 3,192	\$ 6,384	\$ 4,217	\$ 4,217	\$ 8,434	34%	34%	34%
Reallocation (ME&O budget reduced from \$1.2M)			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
TOTAL PROGRAM COSTS	\$ 5,710,992	\$ 5,018,087	\$ 10,729,079	\$ 412,465	\$ 454,615	\$ 867,081	\$ 878,157	\$ 929,060	\$ 1,807,217	15%	19%	17%
Funded Outside of ESA Program Budget												
Indirect Costs				\$ 33,463	\$ 33,679	\$ 67,141	\$ 69,702	\$ 67,351	\$ 137,052			
NGAT Costs		\$ 144,000	\$ 144,000		\$ 2,925	\$ 2,925		\$ 12,084	\$ 12,084		8%	8%

[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] Budget authorized in approval of SDG&E Advice Letter 3612-E/2905-G dated September 23, 2020 for the bridge period January 1 through June 30, 2021.

[3] Negative amount represents Advanced Funds returned to SDG&E in the month of January.

[4] Current Month Expenses for Energy Efficiency Total includes January accruals and/or re-accruals of \$344,909 in the following reporting categories: Appliances \$0; Domestic Hot Water \$24,930; Enclosure \$33,358; HVAC \$25,719; Maintenance \$8,264; Lighting \$66,752; Miscellaneous \$23,434; Customer Enrollment \$136,201; In Home Energy Education \$26,251.

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
February 2021

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	\$ 2,811,132	\$ 2,811,132	\$ 5,622,263	\$ 16,460	\$ 16,460	\$ 32,921	\$ 231,818	\$ (33,383)	\$ 198,435	8%	-1%	4%
In-Home Education			\$ -	\$ -	\$ -	\$ -			\$ -	0%	0%	0%
Leveraging - CSD [3]			\$ -	\$ -	\$ -	\$ -			\$ -	0%	0%	0%
Pilot [4]			\$ -	\$ -	\$ -	\$ -			\$ -	0%	0%	0%
Studies [5]	\$ 54,340	\$ 54,340	\$ 108,680	\$ 663	\$ 663	\$ 1,327	\$ 1,500	\$ 1,500	\$ 2,999	3%	3%	3%
Regulatory Compliance												
General Administration												
TOTAL PROGRAM BUDGET/EXPENSES	\$ 2,865,472	\$ 2,865,472	\$ 5,730,943	\$ 17,124	\$ 17,124	\$ 34,248	\$ 233,318	\$ (31,883)	\$ 201,434	8%	-1%	4%

[1] Add additional categories if relevant to your utility

[2] Reflects unspent funds remaining from 2017-2020 cycle.

[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.

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
February 2021**

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:

Savings estimates are sourced from the PY2015 to 2017 ESA Impact Evaluation; Energy Division instructed the IOUs to use these results for 2019 and 2020 savings estimates.

[4] Microwaves are no longer part of SDG&E's program measure offerings.

Energy Savings Assistance Common Area Measures Program Table 2B
SDG&E
February 2021

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	Number of Units for Cap-kBTU _h and Cap-Tons	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses (\$)
Appliances							
Domestic Hot Water							
Central Boiler**	Cap-kBTU _h						
Faucet Aerator	Each	2		46	0	-	\$ 16
Pipe Insulation	Home						
Envelope							
HVAC							
AC Tune-up**	Cap-Tons	5		72	0	-	\$ 619
Furnace Replacement**	Cap-kBTU _h						
HEAT Pump Split System**	Cap-Tons						
HEAT Pump Split System	Each						
Programmable Thermostat	Each						
Lighting							
Exterior LED Lighting	Fixture	294		18,982	-	-	\$ 54,481
Exterior LED Lighting - Pool	Lamp						
Interior LED Exit Sign	Fixture						
Interior LED Fixture	Fixture	129		24,549	6	-	\$ 15,170
Interior LED Lighting	Lamp	62		1,445	0	-	\$ 6,216
Interior LED Screw-in	Lamp	2		-	-	-	\$ 20
Interior TLED Type A Lamps	Lamp	199		7,481	2	(13)	\$ 2,587
Interior TLED Type C Lamps	Lamp	426		16,015	4	(117)	\$ 11,864
Miscellaneous							
Tier-2 Smart Power Strip	Each						
Variable Speed Pool Pump	Each						
Ancillary Services							
Audit ^[4]		6					\$ 9,006
Total		-		68,590	12	(130)	\$ 99,979

Multifamily Properties Treated	Number
Total Number of Multifamily Properties Treated ²	4
Subtotal of Master-metered Multifamily Properties Treated	2
Total Number of Multifamily Tenant Units w/in Properties Treated ³	194

[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:

Savings estimates are sourced from the PY2015 to 2017 ESA Impact Evaluation; Energy Division instructed the IOUs to use these results for 2019 and 2020 savings estimates.

[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 kBTU_h. 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
February 2021**

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

**Energy Savings Assistance Program Tables 3A-B - Energy Savings and
Average Bill Savings per Treated Home/Common Area
SDG&E
February 2021**

Table 3A-1, ESA Program	
Annual kWh Savings	130,506
Annual Therm Savings	3,186
Lifecycle kWh Savings	1,290,994
Lifecycle Therm Savings	5,998
Current kWh Rate	\$ 0.19
Current Therm Rate	\$ 1.12
Average 1st Year Bill Savings / Treated households	\$ 36.85
Average Lifecycle Bill Savings / Treated Household	\$ 326.86

Table 3A-2, ESA Program - CSD Leveraging	
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	\$ -

Table 3A-3, Summary - ESA Program/CSD Leveraging	
Annual kWh Savings	130,506
Annual Therm Savings	3,186
Lifecycle kWh Savings	1,290,994
Lifecycle Therm Savings	5,998
Current kWh Rate	\$ 0.19
Current Therm Rate	\$ 1.12
Average 1st Year Bill Savings / Treated Households	\$ 36.85
Average Lifecycle Bill Savings / Treated Households	\$ 326.86

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

Table 3B, ESA Program - Multifamily Common Area	
Annual kWh Savings	68,590
Annual Therm Savings	(130)
Lifecycle kWh Savings	768,500
Lifecycle Therm Savings	(1,943)
Current kWh Rate	\$0.19
Current Therm Rate	\$1.12
Average 1st Year Bill Savings / Treated Property	\$ 3,157.11
Average Lifecycle Bill Savings / Treated Property	\$ 35,235.77

**Energy Savings Assistance Program Table 4 - Homes/Buildings Treated
SDG&E
February 2021**

Table 4A-1, ESA Program						
	Eligible Households			Households Treated YTD		
County	Rural [1]	Urban	Total	Rural	Urban	Total
Orange	0	19,035	19,035			0
San Diego	6,992	269,500	276,492	43	655	698
Total	6,992	288,535	295,527	43	655	698

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

Table 4C, ESA Program - Multifamily Common Area						
	*			Properties Treated YTD		
-				-	-	Total
Orange	-	-	-	-	-	-
San Diego	-	-	-	-	4	4
Total					4	4

[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
February 2021**

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	5	12	1	0	40	0	2
San Diego	884	1,127	2	0	874	49	41
Total	889	1,139	3	0	914	49	43

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
February 2021

Table 5A, ESA Program																		
Month	Gas & Electric				Gas Only				Electric Only				Total					
	# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Household Count)		(Annual)		
		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW		# of First-Touch	# of Re-treatment	Therm	kWh	kW
January	151	1,322	35,287	5	-	-	-	-	15	-	5,098	1	166	55	111	1,322	40,385	6
February	504	1,865	81,842	11	-	-	-	-	28	-	8,279	1	532	238	294	1,865	90,121	12
March					-	-	-	-										
April					-	-	-	-										
May					-	-	-	-										
June					-	-	-	-										
July					-	-	-	-										
August					-	-	-	-										
September					-	-	-	-										
October					-	-	-	-										
November					-	-	-	-										
December					-	-	-	-										
YTD	655	3,186	117,129	16	-	-	-	-	43	-	13,377	2	698	293	405	3,186	130,506	18

YTD Total Energy Impacts for all fuel types should equal YTD energy impacts that are reported every month Table 2.

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

Note: SDG&E tracks the measure savings based on the month and year of install. Households treated can have a value of zero, meaning the treated date is from a previous year but the measure install and savings were tracked in a new Program Year.

Table 5B, ESA Program - CSD Leveraging																		
Month	Gas & Electric				Gas Only				Electric Only				Total					
	# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Annual)				
		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW		
January																		
February																		
March																		
April																		
May																		
June																		
July																		
August																		
September																		
October																		
November																		
December																		
YTD	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0

YTD Total Energy Impacts for all fuel types should equal YTD energy impacts that are reported every month Table 2A.

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

Table 5C, ESA Program - Multifamily Common Area																
Month	Gas & Electric				Gas Only				Electric Only				Total			
	# of Properties Treated by Month	(Annual)			# of Properties Treated by Month	(Annual)			# of Properties Treated by Month	(Annual)			# of Properties Treated by Month	(Annual)		
		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW
January	1	(130)	13,195	3	-	-	-	-	3	-	55,395	9	4	(130)	68,590	12
February																
March																
April																
May																
June																
July																
August																
September																
October																
November																
December																
YTD	1	(130)	13,195	3	-	-	-	-	3	-	55,395	9	4	(130)	68,590	12

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
February 2021

	Authorized 2021 Funding [1]			Current Month Expenses			Year to Date Expenses			% of Budget Expended		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Pilots												
Programmable Communicating Thermostat (PCT) [2]	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Total Pilots	\$ -	\$ -	\$ -			\$ -			\$ -	0%	0%	0%
Studies												
Low Income Needs Assessment Study	\$ -	\$ -	\$ -			\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Load Impact Evaluation Study	\$ -	\$ -	\$ -			\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Equity Criteria and Non Energy Benefits Evaluation (NEB's)	\$ -	\$ -	\$ -			\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Unallocated Funds [3]	\$ -	\$ -	\$ -			\$ -	\$ -	\$ -	\$ -	0%	0%	0%
2017 Potential and Goals Study	\$ -	\$ -	\$ -			\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Rapid Feedback Research and Analysis	\$ 54,340	\$ 54,340	\$ 108,680	\$ 663	\$ 663	\$ 1,327	\$ 1,500	\$ 1,500	\$ 2,999	3%	3%	3%
Total Studies	\$ 54,340	\$ 54,340	\$ 108,680	\$ 663	\$ 663	\$ 1,327	\$ 1,500	\$ 1,500	\$ 2,999	3%	3%	3%

[1] Reflects unspent funds remaining from 2017-2020 cycle. [Table 1A].

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

[3] 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].

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
February 2021**

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

7B - Households Receiving In- Home Energy Education Only		
Measures	Units	Households that Only Received Energy Education
In-Home Education	Home	58

7C - Households for My Energy/My Account Platform - YTD		
Opt-Out	Already Enrolled	Opt-In
1,684	937	62

**Energy Savings Assistance Program Table 8 - Contractor Advanced Funding and Repayment
SDG&E
February 2021**

		B-C			E x F			(B)-(cumulative H + cumulative I)	
	Total Advanced Amount[7]	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[3,8]	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	\$0				\$ -	\$ -	\$ -	\$ -	\$ -
Feb-20	\$0				\$ -	\$ -	\$ -	\$ -	\$ -
Mar-20	\$0				\$ -	\$ -	\$ -	\$ -	\$ -
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	\$ -				\$ -	\$ -	\$ -	\$ -	\$ 907,821
Nov-20	\$ -				\$ -	\$ -	\$ -	\$ -	\$ 907,821
Dec-20	\$ -				\$ 116,756	\$ 44,731	\$ -	\$ -	\$ 907,821
Jan-21	\$ -				\$ 268,150	\$ 107,260	\$ -	\$ 20,001	\$ 887,820
Feb-21	\$ -				\$ 657,155	\$ 204,811	\$ -	\$ 345,244	\$ 542,577
Mar-21	\$ -				\$ -	\$ -	\$ -	\$ -	\$ -
Apr-21	\$ -				\$ -	\$ -	\$ -	\$ -	\$ -
May-21	\$ -				\$ -	\$ -	\$ -	\$ -	\$ -
Jun-21	\$ -				\$ -	\$ -	\$ -	\$ -	\$ -
Jul-21	\$ -				\$ -	\$ -	\$ -	\$ -	\$ -
Aug-21	\$ -				\$ -	\$ -	\$ -	\$ -	\$ -
Sep-21	\$ -				\$ -	\$ -	\$ -	\$ -	\$ -
Oct-21	\$ -				\$ -	\$ -	\$ -	\$ -	\$ -
Nov-21	\$ -				\$ -	\$ -	\$ -	\$ -	\$ -
Dec-21	\$ -	\$528,535	\$640,506	40%	\$ -	\$ -	\$ -	\$ -	\$ -
Total	\$1,169,041	\$528,535	\$640,506	40%	\$ 1,042,062	\$ 356,802	\$ -	\$ 626,465	\$ 542,576

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 began December 1, 2020.
- [4] Based on total monthly contractor invoices, up to maximum allowable for each contractor. Results may be less than 40% of invoiced due to contractors reaching maximum credit earned
- [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
- [8] Excludes invoices for contractors previously earning full PPRS Credit Eligible amount.

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
February 2021**

CARE Program:	Authorized Budget [1]			Current Month Expenses			Year to Date Expenses			% of Budget Spent YTD		
	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total	Electric	Gas	Total
Outreach	\$ 1,448,106	\$ 178,979	\$ 1,627,086	\$ 87,100	\$ 11,877	\$ 98,978	\$ 152,783	\$ 20,834	\$ 173,617	11%	12%	11%
Processing / Certification Re-certification	\$ 230,159	\$ 28,447	\$ 258,606	\$ 46,648	\$ 6,361	\$ 53,009	\$ 115,567	\$ 15,759	\$ 131,326	50%	55%	51%
Post Enrollment Verification [2]	\$ 161,832	\$ 20,002	\$ 181,833	\$ (108)	\$ (15)	\$ (123)	\$ (30,074)	\$ (4,101)	\$ (34,175)	-19%	-21%	-19%
IT Programming	\$ 765,355	\$ 94,594	\$ 859,950	\$ 31,157	\$ 4,249	\$ 35,406	\$ 33,021	\$ 4,503	\$ 37,523	4%	5%	4%
Cooling Centers	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Pilots/CHANGES Program [3]	\$ 119,141	\$ 14,725	\$ 133,866	\$ 12,100	\$ 1,650	\$ 13,750	\$ 12,100	\$ 1,650	\$ 13,750	10%	11%	10%
Studies [4]	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Regulatory Compliance	\$ 135,125	\$ 16,701	\$ 151,826	\$ 23,057	\$ 3,144	\$ 26,202	\$ 46,158	\$ 6,294	\$ 52,452	34%	38%	35%
General Administration	\$ 372,130	\$ 45,994	\$ 418,123	\$ 36,634	\$ 4,996	\$ 41,630	\$ 70,217	\$ 9,575	\$ 79,792	19%	21%	19%
CPUC Energy Division [5]	\$ 25,744	\$ 3,182	\$ 28,926	\$ 13,108	\$ 1,787	\$ 14,895	\$ 17,319	\$ 2,362	\$ 19,680	67%	74%	68%
SUBTOTAL MANAGEMENT COSTS	\$ 3,257,593	\$ 402,624	\$ 3,660,217	\$ 249,697	\$ 34,050	\$ 283,746	\$ 417,090	\$ 56,876	\$ 473,966	13%	14%	13%
CARE Rate Discount [6]	\$60,763,500	\$11,972,922	\$ 72,736,422	\$10,994,226	\$2,446,449	\$ 13,440,675	\$22,500,538	\$5,066,109	\$ 27,566,648	37%	42%	38%
TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	\$ 64,021,093	\$ 12,375,545	\$ 76,396,638	\$ 11,243,923	\$ 2,480,498	\$ 13,724,421	\$ 22,917,629	\$ 5,122,985	\$ 28,040,614	36%	41%	37%
Other CARE Rate Benefits												
- DWR Bond Charge Exemption				\$720,468		\$ 720,468	\$1,530,134		\$ 1,530,134			
- CARE Surcharge Exemption				\$907,197	\$ 329,789	\$ 1,236,986	\$1,898,303	\$ 605,749	\$ 2,504,052			
- California Solar Initiative Exemption				\$0		\$ -	\$0		\$ -			
- kWh Surcharge Exemption				\$31,276		\$ 31,276	\$54,604		\$ 54,604			
- Vehicle Grid Integration Exemption				\$81,168		\$ 81,168	\$173,907		\$ 173,907			
Total Other CARE Rate Benefits [7]				\$ 1,740,108	\$ 329,789	\$ 2,069,897	\$ 3,656,948	\$ 605,749	\$ 4,262,697			
Indirect Costs				\$ 53,112	\$ 7,243	\$ 60,354	\$ 103,407	\$ 14,101	\$ 117,507			

[1] Budget authorized by the Commission in Decision 19-06-022.

[2] Negative amount due to reclassification of labor costs within CARE Program from Post-Enrollment Verification category to Processing, Certification, and Verification.

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

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

[5] Includes increased expenses for Energy Division Staff.

[6] Amounts reflected for CARE Discount are 50% of the totals reflected in Advice Letters 3620-E and 2923-G, calculated for bridge funding, effective January 1, 2021.

[7] YTD total includes a \$743 adjustment to January 2021 totals as a result of a change to the methodology of calculating these exemption amounts.

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, & Penetration⁵
SDG&E
February 2021

	New Enrollment									Recertification				Attrition (Drop Offs)				Enrollment		Total CARE Participants	Estimated CARE Eligible	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 ⁴	Failed PEV	Failed Recertification	Other	Total Attrition (P+Q+R+S)				Gross (K+O)	Net Adjusted (K-T)
	Inter-Utility ¹	Intra-Utility ²	Leveraging ³	Combined (B+C+D)	Online	Paper	Phone	Capitation	Combined (F+G+H+I)															
January	28	51	0	79	4,080	763	424	115	5,382	5,461	0	588	0	588	0	0	0	1,690	1,690	6,049	3,771	342,367	293,584	117%
February	8	32	0	40	2,959	608	414	65	4,046	4,086	0	1,236	0	1,236	0	0	0	2,830	2,830	5,322	1,256	343,623	293,584	117%
March	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		293,584	0%
April	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		293,584	0%
May	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		293,584	0%
June	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		293,584	0%
July	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		293,584	0%
August	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		293,584	0%
September	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		293,584	0%
October	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		293,584	0%
November	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		293,584	0%
December	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		293,584	0%
YTD Total	36	83	0	119	7,039	1,371	838	180	9,428	9,547	0	1,824	0	1,824	0	0	0	4,520	4,520	11,371	5,027	343,623	293,584	117%

¹ Enrollments via data sharing between the IOUs.

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

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

⁴ No response includes no response to both Recertification and Verification.

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

CARE Table 3A - Post-Enrollment Verification Results (Model)

SDG&E

February 2021

Month	Total CARE Households Enrolled	Households Requested to Verify ¹	% of CARE Enrolled Requested to Verify Total	CARE Households De-enrolled (Due to no response)	CARE Households De-enrolled (Verified as Ineligible) ²	Total Households De-enrolled ³	% De-enrolled through Post Enrollment Verification ⁴	% of Total CARE Households De-enrolled
January	342,367	0	0.0%	0	0	0	0.0%	0.0%
February	343,623	0	0.0%	0	0	0	0.0%	0.0%
March			0.0%			0	0.0%	0.0%
April			0.0%			0	0.0%	0.0%
May			0.0%			0	0.0%	0.0%
June			0.0%			0	0.0%	0.0%
July			0.0%			0	0.0%	0.0%
August			0.0%			0	0.0%	0.0%
September			0.0%			0	0.0%	0.0%
October			0.0%			0	0.0%	0.0%
November			0.0%			0	0.0%	0.0%
December			0.0%			0	0.0%	0.0%
YTD Total	343,623	0	0.0%	0	0	0	0.0%	0.0%

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

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

³ Verification results are tied to the month initiated and the verification process allows customers 90 days to respond to the verification request. Results may be pending due to the time permitted for a participant to respond.

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

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

CARE Table 3B Post-Enrollment Verification Results (Electric only High Usage)

SDG&E

February 2021

Month	Total CARE Households Enrolled	Households Requested to Verify ^{1, 5}	% of CARE Enrolled Requested to Verify Total	CARE Households De-enrolled (Due to no response) ²	CARE Households De-enrolled (Verified as Ineligible) ²	Total Households De-enrolled ^{2,3}	% De-enrolled through Post Enrollment Verification ⁴	% of Total CARE Households De-enrolled
January	342,367	0	0.0%	0	0	0	0.0%	0.0%
February	343,623	1	0.0%	0	0	0	0.0%	0.0%
March						0	0.0%	0.0%
April						0	0.0%	0.0%
May						0	0.0%	0.0%
June						0	0.0%	0.0%
July						0	0.0%	0.0%
August						0	0.0%	0.0%
September						0	0.0%	0.0%
October						0	0.0%	0.0%
November						0	0.0%	0.0%
December						0	0.0%	0.0%
YTD Total	343,623	1	0.0%	0	0	0	0.0%	0.0%

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

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

³ Medium (400%) and high usage (600%) customers are dropped at 60 days (2 or 3 bill cycles) for non-response to HUV (high usage income verification request). Additionally, 600% + users that have not reduced usage within the 60 day window (2 or 3 bill cycles) are removed from the program. Results may be pending due to the time permitted for a participant to respond.

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

⁵ Due to COVID-19 Customer Protections effective March 4, 2020, high usage verification requests have been discontinued.

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 Applications¹
SDG&E
February 2021

	Provided	Received	Approved	Denied	Pending/Never Completed	Duplicates
Total (Y-T-D)	1,090	16,218	10,083	2,177	57	3,901
Percentage		100%	62%	13%	0%	24%

¹ 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
February 2021**

County	Estimated Eligible Households[1]			Total Households Enrolled[2]			Penetration Rate		
	Urban	Rural	Total	Urban	Rural[3]	Total	Urban	Rural	Total
Orange	18,944	0	18,944	14,837	0	14,837	78%	0%	78%
San Diego	267,760	6,880	274,640	321,254	7,532	328,786	120%	109%	120%
Total	286,704	6,880	293,584	336,091	7,532	343,623	117%	109%	117%

¹ As reflected in filing A.14-11-007, et al., Annual CARE Eligibility Estimates filed February 12, 2021.

² Total Households Enrolled includes submeter tenants.

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

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

CARE Table 6 - Recertification Results
SDG&E
February 2021

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)
January	342,367	0	0.0%	0	0	0.0%	0.0%
February	343,623	0	0.0%	0	0	0.0%	0.0%
March			0.0%			0.0%	0.0%
April			0.0%			0.0%	0.0%
May			0.0%			0.0%	0.0%
June			0.0%			0.0%	0.0%
July			0.0%			0.0%	0.0%
August			0.0%			0.0%	0.0%
September			0.0%			0.0%	0.0%
October			0.0%			0.0%	0.0%
November			0.0%			0.0%	0.0%
December			0.0%			0.0%	0.0%
YTD	343,623	0	0.0%	0	0	0.0%	0.0%

¹ As reflected in filing A.14-11-007, et al., Annual CARE Eligibility Estimates filed February 12, 2021.

² Data represents total residential electric customers.

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

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

⁵ Customers can manually request to recertify but are automatically placed in the COVID protection category as authorized in Resolution M

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

CARE Table 7 - Capitation Contractors¹
SDG&E
February 2021

Contractor	Contractor Type (Check one or more if applicable)				Total Enrollments	
	Private	CBO	WMDVBE	LIHEAP	Current Month	Year-to-Date
211 SAN DIEGO		X			52	142
211 ORANGE COUNTY		X			-	-
ALLIANCE FOR AFRICAN ASSISTANCE		X			-	1
AMERICAN RED CROSS WIC OFFICES		X	X		-	-
CHULA VISTA COMMUNITY COLLABORATIVE		X			-	-
COMMUNITY RESOURCE CENTER		X			-	-
HEARTS AND HANDS WORKING TOGETHER		X			-	-
HOME START		X			-	-
HORN OF AFRICA		X			-	-
INTERFAITH COMMUNITY SERVICES		X			1	1
LA MAESTRA FAMILY CLINIC		X		X	-	-
MAAC PROJECT		X			-	-
NEIGHBORHOOD HEALTH CARE	X				-	1
NORTH COUNTY HEALTH SERVICES		X			-	-
SAN DIEGO STATE UNIVERSITY WIC OFFICES		X			1	3
SAN YSIDRO HEALTH CENTERS		X			-	-
SCRIPPS HEALTH WIC		X			-	-
UNION OF PAN ASIAN COMMUNITIES SAN DIEGO(UPAC)		X			-	-
VISTA COMMUNITY CLINIC		X			-	-
Total Enrollments					54	148

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 adj

**CARE Table 8 - Households as of Month-End
SDG&E
February 2021**

Month	Gas and Electric	Gas Only	Electric Only	Total	Eligible Households¹	Penetration	% Change	Total Residential Accounts²
January	214,147	0	128,220	342,367	293,584	117%	0.6%	1,357,093
February	215,065	0	128,558	343,623	293,584	117%	0.4%	1,359,056
March					293,584	0%	0.0%	
April					293,584	0%	0.0%	
May					293,584	0%	0.0%	
June					293,584	0%	0.0%	
July					293,584	0%	0.0%	
August					293,584	0%	0.0%	
September					293,584	0%	0.0%	
October					293,584	0%	0.0%	
November					293,584	0%	0.0%	
December					293,584	0%	0.0%	
YTD	215,065	0	128,558	343,623	293,584	117%	0.0%	1,359,056

¹ As reflected in filing A.14-11-007, et al., Annual CARE Eligibility Estimates filed February 12, 2021.

² Data represents total residential electric customers.

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

CARE Program Table 9 - Expenditures for Pilots/CHANGES Program¹
SDG&E
February 2021

2021	Authorized 2021 Budget ²	Current Month Expenses	Expenses Since Jan. 1, 2021	% of 2021 Budget Expended
	Total	Total	Total	Total
CHANGES Program	\$ 133,866	\$ 13,750	\$ 13,750	10%
Total	\$ 133,866	\$ 13,750	\$ 13,750	10%

1. Decision 15-12-047 transitioned CHANGES pilot to CHANGES program and funding for the effort is captured herein.
2. Budget authorized by the Commission in Decision 19-06-022.

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 January 2021[1]	
No. of attendees at education sessions	150
Disputes	
Add Level Pay Plan	0
Assisted with CARE Re-Certification/Audit	0
Changed 3rd party Company/Gas Aggregation	0
Changed 3rd Party Electricity Aggregation	0
Enroll in Energy Assistance Programs	0
High Energy CARE User	0
Medical Baseline Application	0
Payment Extension	0
Payment Plan	0
Request Bill Adjustment	1
Request Customer Service Visit	0
Request Meter Service or Testing	0
Schedule Energy Audit	0
Solar	0
Stop Disconnection	0
Time of Use	0
Wildfire Related Issue	0
Total disputes [3]	1

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 Submissior	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	4
Payment Plan	4
Wildfire Related Issue	0
Total Needs Assistance [2]	8

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

[1] There is a one-month lag behind the current reporting month. The data for January 2021 will be reported once received.

[2] Contractor is in the process of validating the total. If there is a discrepancy in the numbers reported, the numbers will be corrected in the April 2021 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

2020-2021 [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			406		2264	

[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 Q3 December 1, 2020 through February 28, 2021 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.