

**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 JANUARY 2021**

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February 22, 2021

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This is the first 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 January 31, 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

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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 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, 2021.⁴ SDG&E has five contractors who accepted advance payments and are eligible to earn PPRS credits.

In January 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 2% 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 January.

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 January 2021			
	2021 Authorized / Planning Assumptions⁵	Actual to Date⁶	%
Budget	\$16,460,022	\$1,107,323	10%
Homes Treated ⁷	5,973	160	3%
kWh Saved	N/A	45,056	N/A
kW Demand Reduced	N/A	6	N/A
Therms Saved	N/A	544	N/A
GHG Emissions Reduced (Tons)	N/A	28	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 January. Joint CARE and ESA Programs marketing, education and outreach efforts are provided in section 1.2.2 below.

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.

ESA Program Contractor Outreach

In January, SDG&E's largest O&A contractor reported employee recruitment efforts to support ESA Program enrollment, which allowed the contractor to overcome the workforce issues identified in December 2020 and continue successful canvassing efforts. In January, 353 ESA enrollments were received through canvassing efforts, which keeps pace with December 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 3,067 leads and 1,083 enrollments for the month of January.

ESA Program Multifamily Common Area Measure (MF CAM) Initiative

In January 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 January, four properties were treated and seven additional properties are currently receiving measure installations. In addition, there are a total of six 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 January, six customers were served by the Language Line.

Language	Calls
Arabic	3
Mandarin	1
Karen	1
Vietnamese	1
TOTAL	6

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 January 2021 are summarized in the following sections:

Online Advertising

In January 2021, SDG&E continued to run paid search and re-targeted banner ads. Paid Search garnered 31,530 impressions with a click-through-rate (CTR) of 20 percent (%). Retargeting banner display ads received 1,310,084 impressions with a CTR of 0.62%. 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 131 customer assistance messages in January to an audience of more than 235,000 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.



Casa Familiar @CasaFamiliar · 22m



DO YOU NEED HELP WITH YOUR ENERGY BILL?

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.
#sdge #energytips4u





Direct Marketing

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

Direct Mail

SDG&E continued direct mail efforts and sent 32,169 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 428,981 customers with a 34% Open Rate and 3% 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 January 2021 generated the following numbers:

The Harris Group	
ESA Leads	0
CARE Enrollments	1,819
CARE Recertifications ⁹	12

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.

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.

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 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 January 2021, SDG&E’s partner outreach activities resulted in the following activities:

Energy Solutions Partner Network	
ESA Leads	0
CARE Enrollments	9
CARE Recertifications ¹⁰	2

Partner Spotlight

In January 2021, the SDG&E Customer Solutions Outreach Team participated in 18 events, presentations, and trainings/workshops, eight of which were virtual, that featured information and enrollment in energy solutions programs, services, and tools. Many of these activities were hosted by SDG&E’s partner network and included drive through events, such as food drives, where information was shared in a safe manner while following COVID-19 social distancing guidelines.

¹⁰ *Id.*

Outreach activities were focused on engaging customers with solutions such as the CARE and ESA Programs and reached over 2,300 people.

Energy Solutions Partner Activities

CREER Comunidad Food Drive and Resource Fair

On January 12, CREER Comunidad, an organization helping to develop children, youth, and families through educational, cultural, arts, sports, and civic leadership programs, started their food and resource distribution. CREER distributed CARE, ESA, and Medical Baseline forms at the resource food bank. CREER has become a vital resource of food and resources to more than 850 vulnerable families affected by the COVID-19 pandemic. This year, the food drive will become a weekly event where SDG&E materials will be distributed to all attendees.

San Diego Oasis Fundraiser Friday Collaborative Presentation

On January 15, San Diego Oasis invited SDG&E's outreach team to present to a group of over 40 non-profit organizations at a meeting, known as Fundraiser Friday. These non-profit organizations, some part of the SDG&E Partner Network, meet once a week to discuss and collaborate on programs to assist customers. SDG&E's presentation included information on the Energy Solutions Partner Network and programs including CARE, ESA, and Medical Baseline. The outreach team will continue to participate in these meetings to bring valuable

program information to participants and establish potential opportunities to expand the partner network.

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 January 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 January 2021, SDG&E's CCC and Branch Office generated the following applications and leads over the telephone:

	CCC	Branch Office
ESA Leads	10	1
CARE Enrollments	4	4
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 January 2021. In addition, GRID requested supplemental information on the status of ESA activities generated from the initial GRID list provided, which SDG&E provided in January. As of January 2021, SDG&E does not have any enrollment activities from this leveraging effort.

Additionally, SDG&E and GRID have been in discussions to finalize the draft Non-Disclosure Agreement (NDA) for additional data sharing efforts to be conducted for the DAC-SASH program in compliance with D. 20-12-003. 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. However, SDG&E and GRID are in discussions to finalize an NDA for additional data sharing efforts to be conducted for the DAC-SASH program in compliance with D.20-12-003. Once all NDA issues are resolved, SDG&E will be updating the NDA for the CARE HEU data sharing efforts and will retroactively submit all leads to GRID to comply 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. SDG&E has been partnering with SDCWA to update the agreement for a continued 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 January, LIHEAP organizations generated 167 leads for the ESA Program and enrolled 87 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 January 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 initiation meeting was held on January 12, 2021. A draft research plan is being developed and will be presented in a public webinar on March 5, 2021. The study is expected to be complete by December 2022.

Non Energy Benefits (NEB) Assessment

A public webinar to present the results of the study to stakeholders was held on January 6, 2021. Stakeholders were asked to submit comments on the study by January 20; however, no comments were received. The final version of the study along with a memorandum from the IOUs illustrating the impact of the study's results on program year 2019 NEB values will be presented to the low-income service lists in February.

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	\$74,640	5%
Proc., Certification and Verification	\$258,606	\$78,317	30%
Post Enrollment Verification	\$181,833	\$(34,052) ¹²	-19%
Information Tech./Programming	\$859,950	\$2,117	0%
Pilots-CHANGES	\$133,866	\$0	0%
Regulatory Compliance	\$151,826	\$26,250	17%
General Administration	\$418,123	\$38,163	9%
CPUC Energy Division Staff	\$28,926	\$4,785	17%
Cooling Centers ¹³	\$0	\$0	0%
Total Expenses	\$3,660,217	\$190,220	5%
Subsidies and Benefits ¹⁴	\$72,736,422	\$14,125,973	19%
Total Program Costs and Discounts	\$76,396,638	\$14,316,193	19%

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 labor correction and update of labor allocations.

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
338,166	293,584	115%

2.2 Outreach

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

In January 2021, marketing and outreach efforts generated 3,334 completed CARE applications and 2,165 new enrollments/recertifications for the program.

Below is a summary of CARE specific outreach efforts.

Direct Marketing

Direct Mail

In January 2021, SDG&E continued the bill comparison campaign by mailing a comparison letter to 26,263 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 January 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 January 2021, SDG&E sent out 78,728 emails (many of these reminders) which generated a 36% open rate and a 5% 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 (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 January, the following numbers were generated by the Capitation Agencies:

Capitation Agencies	
ESA Leads	102
CARE Enrollments	160
CARE Recertifications ¹⁶	2

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 January, 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

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.

offices include a source coded CARE application in their new client intake packets. In January 2021, the following applications were received:

HHSA	January	YTD
ESA Leads	0	0
CARE Enrollments	51	51
CARE Recertifications ¹⁷	3	3

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

¹⁷ *Id.*

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 December 2020 and Table 11 activity for September 1, 2020 through November 30, 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 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 Advance 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**

January 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	\$ 44,169	\$ 13,634	\$ 57,803	\$ 44,169	\$ 13,634	\$ 57,803	7%	10%	8%
Domestic Hot Water	\$ 21,750	\$ 703,250	\$ 725,000	\$ 1,917	\$ 61,987	\$ 63,904	\$ 1,917	\$ 61,987	\$ 63,904	9%	9%	9%
Enclosure	\$ 879,780	\$ 1,166,220	\$ 2,046,000	\$ 58,585	\$ 77,659	\$ 136,244	\$ 58,585	\$ 77,659	\$ 136,244	7%	7%	7%
HVAC	\$ 256,000	\$ 1,000,000	\$ 1,256,000	\$ 8,477	\$ 115,628	\$ 124,105	\$ 8,477	\$ 115,628	\$ 124,105	3%	12%	10%
Maintenance	\$ 7,845	\$ 110,000	\$ 117,845	\$ 221	\$ 12,314	\$ 12,535	\$ 221	\$ 12,314	\$ 12,535	3%	11%	11%
Lighting	\$ 1,800,000	\$ -	\$ 1,800,000	\$ 130,983	\$ -	\$ 130,983	\$ 130,983	\$ -	\$ 130,983	7%	0%	7%
Miscellaneous	\$ 259,000	\$ -	\$ 259,000	\$ 28,117	\$ -	\$ 28,117	\$ 28,117	\$ -	\$ 28,117	11%	0%	11%
Customer Enrollment	\$ 785,000	\$ 785,000	\$ 1,570,000	\$ 66,598	\$ 66,598	\$ 133,195	\$ 66,598	\$ 66,598	\$ 133,195	8%	8%	8%
In Home Education	\$ 145,000	\$ 145,000	\$ 290,000	\$ 12,981	\$ 12,981	\$ 25,961	\$ 12,981	\$ 12,981	\$ 25,961	9%	9%	9%
Contractor Advanced Funds [3]	\$ -	\$ -	\$ -	\$ (10,000)	\$ (10,000)	\$ (20,001)	\$ (10,000)	\$ (10,000)	\$ (20,001)	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	\$ 342,046	\$ 350,800	\$ 692,846	\$ 342,046	\$ 350,800	\$ 692,846	7%	9%	8%
Training Center	\$ 42,500	\$ 42,500	\$ 85,000	\$ 1,285	\$ 1,285	\$ 2,570	\$ 1,285	\$ 1,285	\$ 2,570	0%	0%	0%
Inspections	\$ 40,000	\$ 40,000	\$ 80,000	\$ 2,434	\$ 2,434	\$ 4,868	\$ 2,434	\$ 2,434	\$ 4,868	6%	6%	6%
Marketing and Outreach	\$ 235,000	\$ 235,000	\$ 470,000	\$ 6,876	\$ 6,876	\$ 13,751	\$ 6,876	\$ 6,876	\$ 13,751	3%	3%	3%
Statewide Marketing Education and Outreach	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Studies	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Regulatory Compliance	\$ 77,250	\$ 77,250	\$ 154,500	\$ 15,347	\$ 15,347	\$ 30,695	\$ 15,347	\$ 15,347	\$ 30,695	20%	20%	20%
General Administration	\$ 558,367	\$ 558,367	\$ 1,116,734	\$ 96,678	\$ 96,678	\$ 193,356	\$ 96,678	\$ 96,678	\$ 193,356	17%	17%	17%
CPUC Energy Division	\$ 12,500	\$ 12,500	\$ 25,000	\$ 1,025	\$ 1,025	\$ 2,051	\$ 1,025	\$ 1,025	\$ 2,051	8%	8%	8%
Reallocation (ME&O budget reduced from \$1.2M)			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
TOTAL PROGRAM COSTS	\$ 5,710,992	\$ 5,018,087	\$ 10,729,079	\$ 465,691	\$ 474,445	\$ 940,136	\$ 465,691	\$ 474,445	\$ 940,136	8%	9%	9%
Funded Outside of ESA Program Budget												
Indirect Costs				\$ 36,239	\$ 33,672	\$ 69,911	\$ 36,239	\$ 33,672	\$ 69,911			
NGAT Costs		\$ 144,000	\$ 144,000		\$ 9,159	\$ 9,159		\$ 9,159	\$ 9,159		6%	6%

[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
January 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	\$ 215,358	\$ (49,843)	\$ 165,514	\$ 215,358	\$ (49,843)	\$ 165,514	8%	-2%	3%
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	\$ 836	\$ 836	\$ 1,673	\$ 836	\$ 836	\$ 1,673	2%	2%	2%
Regulatory Compliance												
General Administration												
TOTAL PROGRAM BUDGET/EXPENSES	\$ 2,865,472	\$ 2,865,472	\$ 5,730,943	\$ 216,194	\$ (49,007)	\$ 167,187	\$ 216,194	\$ (49,007)	\$ 167,187	8%	-2%	3%

[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 2
SDG&E
January 2021

Measures	ESA Program (Summary) Total							ESA Program (First Touch Homes Treated)							ESA Program (Re-Treated Homes/Go Backs)							ESA Program (Aliso Canyon - SCG & SCE) [6]						
	Units	Year-To-Date Completed & Expended Installation						Units	Year-To-Date Completed & Expended Installation						Units	Year-To-Date Completed & Expended Installation						Units	Year-To-Date Completed & Expended Installation					
		Quantity Installed (K+S)	kWh [4] (Annual) (L+T)	kW [4] (Annual) (M+U)	Therms [4] (Annual) (N+V)	Expenses (\$) [7] (O+W)	% of Expenditure		Quantity Installed	kWh[4] (Annual)	kW[4] (Annual)	Therms[4] (Annual)	Expenses (\$)	% of Expenditure		Quantity Installed	kWh[4] (Annual)	kW[4] (Annual)	Therms[4] (Annual)	Expenses (\$)	% of Expenditure		Quantity Installed	kWh[4] (Annual)	kW[4] (Annual)	Therms[4] (Annual)	Expenses (\$)	% of Expenditure
Appliances																												
High Efficiency Clothes Washer	Each	5	-	-	93	4,648	1.2%	Each	-	-	-	-	\$ -	0.0%	Each	5	-	-	93	\$ 4,648	1.7%	Each	-	-	-	-	-	
Refrigerator	Each	22	12,402	1	-	21,602	5.6%	Each	7	4,079	0	-	\$ 7,245	6.8%	Each	15	8,323	1	-	\$ 14,358	5.2%	Each	-	-	-	-	-	
Microwave [5]	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	-	
Domestic Hot Water																												
Other Domestic Hot Water[3]	Home	381	2,522	0	966	17,582	4.6%	Home	116	720	0	295	\$ 5,182	4.8%	Home	265	1,802	0	671	\$ 12,400	4.5%	Home	-	-	-	-	-	
Water Heater Tank and Pipe Insulation	Home	337	-	-	64	2,780	0.7%	Home	110	-	-	60	\$ 1,130	1.1%	Home	227	-	-	4	\$ 1,650	0.6%	Home	-	-	-	-	-	
Water Heater Repair/Replacement	Home	11	-	-	273	34,308	9.0%	Home	3	-	-	98	\$ 9,114	8.5%	Home	8	-	-	175	\$ 25,194	9.1%	Home	-	-	-	-	-	
Combined Showerhead/TSV	Home	-	-	-	-	-	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	-	
New - Heat Pump Water Heater	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	-	
New - Tub Diverter/ Tub Spout	Each	6	-	-	12	632	0.2%	Each	-	-	-	-	\$ -	0.0%	Each	6	-	-	12	\$ 632	0.2%	Each	-	-	-	-	-	
New - Thermostat-controlled Shower Valve	Each	-	-	-	-	-	0.0%	Each	0	0	0	0	\$ 0	0.0%	Each	0	0	0	0	\$ -	0.0%	Each	-	-	-	-	-	
Enclosure[1]																												
Air Sealing	Home	-	-	-	-	96,490	25.2%	Home	-	-	-	-	\$ 29,533	27.6%	Home	-	-	-	-	\$ 66,957	24.3%	Home	-	-	-	-	-	
Caulking	Home	-	-	-	-	-	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	-	
Attic Insulation	Home	3	430	0	105	4,767	1.2%	Home	2	430	0	70	\$ 3,105	2.9%	Home	1	-	-	35	\$ 1,662	0.6%	Home	-	-	-	-	-	
HVAC																												
FAU Standing Pilot Conversion	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	-	
Furnace Repair/Replacement	Each	42	-	-	(829)	90,233	23.6%	Each	6	-	-	(155)	\$ 17,527	16.4%	Each	36	-	-	(674)	\$ 72,706	26.4%	Each	-	-	-	-	-	
Room A/C Replacement	Each	1	(186)	(0)	-	946	0.2%	Each	-	-	-	-	\$ -	0.0%	Each	1	(186)	(0)	-	\$ 946	0.3%	Each	-	-	-	-	-	
Central A/C replacement	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	-	
Heat Pump Replacement	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	-	
Evaporative Cooler (Replacement)	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	-	
Evaporative Cooler (Installation)	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	-	
Duct Test and Seal	Home	15	-	-	90	1,491	0.4%	Home	6	-	-	36	\$ 597	0.6%	Home	9	-	-	54	\$ 895	0.3%	Home	-	-	-	-	-	
New - Energy Efficient Fan Control	Home	-	-	-	-	-	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	-	
New - Prescriptive Duct Sealing	Home	-	-	-	-	-	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	-	
New - High Efficiency Forced Air Unit (HE FAU)	Home	-	-	-	-	-	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	-	
New - A/C Time Delay	Home	-	-	-	-	-	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	-	
New - Smart Thermostat	Home	4	1,092	-	26	840	0.2%	Home	2	546	-	13	\$ 420	0.4%	Home	2	546	-	13	\$ 420	0.2%	Home	-	-	-	-	-	
Maintenance																												
Furnace Clean and Tune	Home	81	-	-	(177)	6,188	1.6%	Home	25	-	-	(57)	\$ 1,967	1.8%	Home	56	-	-	(120)	\$ 4,221	1.5%	Home	-	-	-	-	-	
Central A/C Tune up	Home	-	-	-	-	-	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	-	
Lighting																												
Interior Hard wired LED fixtures	Each	175	740	0	(13)	14,693	3.8%	Each	37	157	0	(3)	\$ 3,107	2.9%	Each	138	584	0	(10)	\$ 11,586	4.2%	Each	-	-	-	-	-	
Exterior Hard wired LED fixtures	Each	101	519	0	-	7,317	1.9%	Each	28	144	0	-	\$ 2,029	1.9%	Each	73	375	0	-	\$ 5,289	1.9%	Each	-	-	-	-	-	
LED Torchere	Each	189	799	0	(15)	17,348	4.5%	Each	60	254	0	(5)	\$ 5,436	5.1%	Each	129	546	0	(10)	\$ 11,912	4.3%	Each	-	-	-	-	-	
Occupancy Sensor	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	-	
LED Night Light	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	-	
New - LED R/BR Lamps	Each	152	459	0	(8)	2,458	0.6%	Each	47	142	0	(2)	\$ 760	0.7%	Each	105	317	0	(6)	\$ 1,698	0.6%	Each	-	-	-	-	-	
New - LED A-Lamps	Each	1,367	2,898	0	(44)	20,095	5.3%	Each	459	973	0	(17)	\$ 6,747	6.3%	Each	908	1,925	0	(26)	\$ 13,348	4.8%	Each	-	-	-	-	-	
Miscellaneous																												
Pool Pumps	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	-	
Smart Strip	Each	42	5,880	1	-	1,669	0.4%	Each	10	1,400	0	-	\$ 397	0.4%	Each	32	4,480	1	-	\$ 1,272	0.5%	Each	-	-	-	-	-	
Smart Strip Tier II	Each	125	17,500	2	-	8,715	2.3%	Each	54	7,560	1	-	\$ 3,707	3.5%	Each	71	9,940	1	-	\$ 5,009	1.8%	Each	-	-	-	-	-	
Pilots																												
Customer Enrollment																												
ESA Outreach & Assessment	Home	-	-	-	-	22,332	5.8%	Home	-	-	-	-	\$ 7,425	6.9%	Home	-	-	-	-	\$ 14,907	5.4%	Home	-	-	-	-	-	
ESA In-Home Energy Education	Home	196	-	-	-	5,606	1.5%	Home	60	-	-	-	\$ 1,675	1.6%	Home	136	-	-	-	\$ 3,931	1.4%	Home	-	-	-	-	-	
Total Savings/Expenditures			45,056	6	544	\$ 382,741				16,404	2	333	\$ 107,100.23			2,087	28,652	4	211	\$ 275,641			-	-	-	\$ -		
Total Households Weatherized [2]		255						73							182													
Households Treated	Total (K+S)							First Touches							Re-treated Homes/Go-Backs													
- Single Family Households Treated	Home	35						Home	18					Home	17													
- Multi-family Households Treated	Home	38						Home	16					Home	22													
- Mobile Homes Treated	Home	87						Home	24					Home	63													
Total Number of Households Treated	Home	160						Home	58					Home	102													
# Eligible Households to be Treated for PY [3]	Home	5,973						Home	N/A					Home	5,973													
% of Households Treated	%	3%						%	N/A					%	2%													
- Master-Meter Households Treated	Home	24						Home	8					Home	16													

[1] Envelope and Air Se

**Energy Savings Assistance Program Table 2A
SDG&E
January 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							
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 2E

SDG&E

January 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							
Total	-	-		68,590	12	(130)	\$ 90,973

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
January 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
January 2021**

Table 3A-1, ESA Program	
Annual kWh Savings	45,056
Annual Therm Savings	544
Lifecycle kWh Savings	419,156
Lifecycle Therm Savings	(1,390)
Current kWh Rate	\$ 0.18
Current Therm Rate	\$ 1.08
Average 1st Year Bill Savings / Treated households	\$ 44.34
Average Lifecycle Bill Savings / Treated Household	\$ 377.04

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	45,056
Annual Therm Savings	544
Lifecycle kWh Savings	419,156
Lifecycle Therm Savings	(1,390)
Current kWh Rate	\$ 0.18
Current Therm Rate	\$ 1.08
Average 1st Year Bill Savings / Treated Households	\$ 44.34
Average Lifecycle Bill Savings / Treated Households	\$ 377.04

[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	\$0.18
Current Therm Rate	\$1.08
Average 1st Year Bill Savings / Treated Property	\$ 3,065.15
Average Lifecycle Bill Savings / Treated Property	\$ 34,209.49

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

Table 4A-1, ESA Program						
County	Eligible Households			Households Treated YTD		
	Rural [1]	Urban	Total	Rural	Urban	Total
Orange	0	19,035	19,035			0
San Diego	6,992	269,500	276,492	11	149	160
Total	6,992	288,535	295,527	11	149	160

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

Table 4C, ESA Program - Multifamily Common Area						
County	*			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
January 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	11	1	0	26	0	2
San Diego	374	298	1	0	440	18	18
Total	379	309	2	0	466	18	20

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
January 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	145	544	36,965	5	-	-	-	-	15	-	8,091	1	160	-	-	544	45,056	6
February					-	-	-	-					-	-	-	-	-	-
March					-	-	-	-					-	-	-	-	-	-
April					-	-	-	-					-	-	-	-	-	-
May					-	-	-	-					-	-	-	-	-	-
June					-	-	-	-					-	-	-	-	-	-
July					-	-	-	-					-	-	-	-	-	-
August					-	-	-	-					-	-	-	-	-	-
September					-	-	-	-					-	-	-	-	-	-
October					-	-	-	-					-	-	-	-	-	-
November					-	-	-	-					-	-	-	-	-	-
December					-	-	-	-					-	-	-	-	-	-
YTD	145	544	36,965	5	-	-	-	-	15	-	8,091	1	160	-	-	544	45,056	6

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
January 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	\$ 836	\$ 836	\$ 1,673	\$ 836	\$ 836	\$ 1,673	2%	2%	2%
Total Studies	\$ 54,340	\$ 54,340	\$ 108,680	\$ 836	\$ 836	\$ 1,673	\$ 836	\$ 836	\$ 1,673	2%	2%	2%

[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
January 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

7B - Households Receiving In- Home Energy Education Only		
Measures	Units	Households that Only Received Energy Education
In-Home Education	Home	37

7C - Households for My Energy/My Account Platform - YTD		
Opt-Out	Already Enrolled	Opt-In
822	438	24

Energy Savings Assistance Program Table 8 - Contractor Advanced Funding and Repayment
SDG&E
January 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]	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							\$0	
Feb-20	\$0							\$0	
Mar-20	\$0							\$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									
Oct-20									
Nov-20									
Dec-20									
Jan-21	\$ -				\$ 312,511	\$ 125,005	\$ -	\$ (20,001)	\$ (20,001)
Feb-21	\$ -				\$ -	\$ -	\$ -	\$ -	\$ -
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%	\$ 312,511	\$ 125,005	\$ -	\$ (281,221)	\$ 887,820

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
- [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
January 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	\$ 65,683	\$ 8,957	\$ 74,640	\$ 65,683	\$ 8,957	\$ 74,640	5%	5%	5%
Processing / Certification Re-certification	\$ 230,159	\$ 28,447	\$ 258,606	\$ 68,919	\$ 9,398	\$ 78,317	\$ 68,919	\$ 9,398	\$ 78,317	30%	33%	30%
Post Enrollment Verification [2]	\$ 161,832	\$ 20,002	\$ 181,833	\$ (29,965)	\$ (4,086)	\$ (34,052)	\$ (29,965)	\$ (4,086)	\$ (34,052)	-19%	-20%	-19%
IT Programming	\$ 765,355	\$ 94,594	\$ 859,950	\$ 1,863	\$ 254	\$ 2,117	\$ 1,863	\$ 254	\$ 2,117	0%	0%	0%
Cooling Centers	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Pilots/CHANGES Program [3]	\$ 119,141	\$ 14,725	\$ 133,866	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Studies [4]	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Regulatory Compliance	\$ 135,125	\$ 16,701	\$ 151,826	\$ 23,100	\$ 3,150	\$ 26,250	\$ 23,100	\$ 3,150	\$ 26,250	17%	19%	17%
General Administration	\$ 372,130	\$ 45,994	\$ 418,123	\$ 33,583	\$ 4,580	\$ 38,163	\$ 33,583	\$ 4,580	\$ 38,163	9%	10%	9%
CPUC Energy Division [5]	\$ 25,744	\$ 3,182	\$ 28,926	\$ 4,211	\$ 574	\$ 4,785	\$ 4,211	\$ 574	\$ 4,785	16%	18%	17%
SUBTOTAL MANAGEMENT COSTS	\$ 3,257,593	\$ 402,624	\$ 3,660,217	\$ 167,394	\$ 22,826	\$ 190,220	\$ 167,394	\$ 22,826	\$ 190,220	5%	6%	5%
CARE Rate Discount [6]	\$60,763,500	\$11,972,922	\$ 72,736,422	\$11,506,312	\$2,619,661	\$ 14,125,973	\$11,506,312	\$2,619,661	\$ 14,125,973	19%	22%	19%
TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS	\$ 64,021,093	\$ 12,375,545	\$ 76,396,638	\$ 11,673,706	\$ 2,642,487	\$ 14,316,193	\$ 11,673,706	\$ 2,642,487	\$ 14,316,193	18%	21%	19%
Other CARE Rate Benefits												
- DWR Bond Charge Exemption				\$809,666		\$ 809,666	\$809,666		\$ 809,666			
- CARE Surcharge Exemption				\$991,106	\$ 275,960	\$ 1,267,066	\$991,106	\$ 275,960	\$ 1,267,066			
- California Solar Initiative Exemption				\$0		\$ -	\$0		\$ -			
- kWh Surcharge Exemption				\$24,326		\$ 24,326	\$24,326		\$ 24,326			
- Vehicle Grid Integration Exemption				\$92,485		\$ 92,485	\$92,485		\$ 92,485			
Total Other CARE Rate Benefits				\$1,917,583	\$ 275,960	\$ 2,193,543	\$1,917,583	\$ 275,960	\$ 2,193,543			
Indirect Costs				\$ 50,295	\$ 6,858	\$ 57,153	\$ 50,295	\$ 6,858	\$ 57,153			

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

[2] Negative amount due to labor correction and update of labor allocations.

[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.

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
January 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	15	23	0	38	2,626	403	304	100	3,433	3,471	0	588	0	588	0	0	0	1,323	1,323	4,059	2,148	338,166	293,584	115%	
February			0	0					0	0				0					0	0	0		293,584	0%	
March			0	0					0	0				0					0	0	0		293,584	0%	
April			0	0					0	0				0					0	0	0		293,584	0%	
May			0	0					0	0				0					0	0	0		293,584	0%	
June			0	0					0	0				0					0	0	0		293,584	0%	
July			0	0					0	0				0					0	0	0		293,584	0%	
August			0	0					0	0				0					0	0	0		293,584	0%	
September			0	0					0	0				0					0	0	0		293,584	0%	
October			0	0					0	0				0					0	0	0		293,584	0%	
November			0	0					0	0				0					0	0	0		293,584	0%	
December			0	0					0	0				0					0	0	0		293,584	0%	
YTD Total	15	23	0	38	2,626	403	304	100	3,433	3,471	0	588	0	588	0	0	0	1,323	1,323	4,059	2,148	338,166	293,584	115%	

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
January 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	338,166	0	0.0%	0	0	0	0.0%	0.0%
February			#DIV/0!			0	0.0%	0.0%
March			#DIV/0!			0	0.0%	0.0%
April			#DIV/0!			0	0.0%	0.0%
May			#DIV/0!			0	0.0%	0.0%
June			#DIV/0!			0	0.0%	0.0%
July			#DIV/0!			0	0.0%	0.0%
August			#DIV/0!			0	0.0%	0.0%
September			#DIV/0!			0	0.0%	0.0%
October			#DIV/0!			0	0.0%	0.0%
November			#DIV/0!			0	0.0%	0.0%
December			#DIV/0!			0	0.0%	0.0%
YTD Total	338,166	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
January 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) 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	338,166	0	0.0%	0	0	0	0.0%	0.0%
February						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	338,166	0	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.

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
January 2021

	Provided	Received	Approved	Denied	Pending/Never Completed	Duplicates
Total (Y-T-D)	594	7,877	4,949	965	19	1,944
Percentage		100%	63%	12%	0%	25%

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
January 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	14,706	0	14,706	78%	0%	78%
San Diego	267,760	6,880	274,640	316,023	7,437	323,460	118%	108%	118%
Total	286,704	6,880	293,584	330,729	7,437	338,166	115%	108%	115%

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
January 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	338,166	0	0.0%	0	0	0.0%	0.0%
February			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	338,166	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
January 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			79	79
211 ORANGE COUNTY		X			-	-
ALLIANCE FOR AFRICAN ASSISTANCE		X			1	1
AMERICAN RED CROSS WIC OFFICES		X	X		-	-
CATHOLIC CHARITIES		X			-	-
CHULA VISTA COMMUNITY COLLABORATIVE		X			-	0
COMMUNITY RESOURCE CENTER		X			-	0
HEARTS AND HANDS WORKING TOGETHER		X			-	-
HOME START		X			-	-
HORN OF AFRICA		X			-	-
INTERFAITH COMMUNITY SERVICES		X			-	-
LA MAESTRA FAMILY CLINIC		X		X	-	0
MAAC PROJECT		X			-	-
NEIGHBORHOOD HEALTH CARE	X				-	0
NORTH COUNTY HEALTH SERVICES		X			-	0
SAN DIEGO STATE UNIVERSITY WIC OFFICES		X			1	1
SAN YSIDRO HEALTH CENTERS		X			-	-
SCRIPPS HEALTH WIC		X			-	-
UNION OF PAN ASIAN COMMUNITIES SAN DIEGO(UPAC)		X			-	-
VISTA COMMUNITY CLINIC		X			-	-
Total Enrollments					81	81

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
January 2021**

Month	Gas and Electric	Gas Only	Electric Only	Total	Eligible Households ¹	Penetration	% Change	Total Residential Accounts ²
January	212,952	0	125,214	338,166	293,584	115%	0.6%	1,358,818
February					293,584	0%	0.0%	
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	212,952	0	125,214	338,166	293,584	115%	0.0%	1,358,818

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
January 2021

2020	Authorized 2021 Budget ²	Current Month Expenses	Expenses Since Jan. 1, 2021	% of 2021 Budget Expended
	Total	Total	Total	Total
CHANGES Program	\$ 133,866	\$ -	\$ -	0%
Total	\$ 133,866	\$ -	\$ -	0%

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 December 2020[1]	
No. of attendees at education sessions	168
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	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
Total disputes [3]	0

Needs Assistance	
Add/Remove Level Pay Plan	0
CARE Enrollment	0
Assisted with CARE Re-Certification/Audit	0
Assisted with Changes to Account	0
Energy Efficiency Tool	0
Assisted High Energy User with CARE Doc Submission	0
Assisted with Reconnection	0
Billing Language Changed	0
Consumer Education Only	0
Electricity Aggregation	0
Energy Alerts	0
Enrolled in Demand Response Programs	0
ESAP	0
HEAP/LIHEAP	1
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	3
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, English

[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 March 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

Q2 September 1 - November 30, 2020 [1,2]

Date ³	Session Language	Description of Service Provided (e.g. utility bill assistance, utility bill dispute resolution, and other energy related issues)	Session Logistics			
			# of Sessions	Length (Hours) ⁴	Number of Attendees	Description of Information / Literature Provided
N/A	Spanish	CARE/FERA and Other Assistance Programs	2	N/A	68	CHANGES Ed Handout
N/A	Arabic	Understanding Your Bill	5	N/A	50	CHANGES Ed Handout
N/A	English	Understanding Your Bill	20	N/A	186	CHANGES Ed Handout
N/A	Spanish	Understanding Your Bill	1	N/A	50	CHANGES Ed Handout
Month Total			28		354	
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.