

**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 MARCH 2021**

Rebecca D. Hansson

*Attorney for:*

**SAN DIEGO GAS & ELECTRIC COMPANY**

8330 Century Park Court, CP32D

San Diego, CA 92123-1530

Telephone: (858) 654-8278

Facsimile: (619) 699-5027

Email: rhansson@sdge.com

April 21, 2021

**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 MARCH 2021**

This is the third 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 March 31, 2021, for San Diego Gas & Electric Company.

Respectfully Submitted,

*/s/ Rebecca D. Hansson*

*Rebecca D. Hansson*

*Attorney for:*

**SAN DIEGO GAS & ELECTRIC**

**COMPANY**8330 Century Park Court, CP32D

San Diego, CA 92123-1530

Telephone: (858) 654-8278

Facsimile: (619) 699-5027

Email: rhansson@sdge.com

April 21, 2021



**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 &amp; Training (WE&amp;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 (D.) 19-06-022, the Commission authorized CARE and ESA Program bridge funding up to 2020 program year (PY) 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.<sup>1</sup> 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.<sup>2</sup> 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,<sup>3</sup> whichever occurs first.

---

<sup>1</sup> D.19-06-022 at 12.

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

<sup>3</sup> D.19-06-022 at 13 ("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).

## 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.<sup>4</sup> SDG&E has five contractors who accepted advance payments and are eligible to earn PPRS credits. As of March, three 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 March 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 March 2021.

---

<sup>4</sup> See Resolution E-5074 at 10 which states “The IOUs shall provide a 30 day advance notice to contractors of when the six-month PPRS credit-earning period begins.” The IOUs consist of Pacific Gas and Electric Company, SDG&E, Southern California Gas Company, and Southern California Edison Company.

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

<b>ESA Program Summary through March 2021</b>			
	<b>2021 Authorized / Planning Assumptions<sup>5</sup></b>	<b>Actual to Date<sup>6</sup></b>	<b>%</b>
Budget	\$16,460,022	\$3,808,993	23%
Homes Treated <sup>7</sup>	5,973	2,307	39%
MF CAM Properties Treated	N/A	5	39%
kWh Saved	N/A	461,425	N/A
kW Demand Reduced	N/A	73	N/A
Therms Saved	N/A	6,802	N/A
GHG Emissions Reduced (Tons)	N/A	294	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 March. Joint CARE and ESA Programs marketing, education and outreach efforts are provided in section 1.2.2 below.

ESA Program Contractor Outreach

In March, SDG&E’s largest O&A contractor continues to report improved outreach and enrollment efforts to support ESA Program enrollments. In March,

---

<sup>5</sup> 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 energy savings and demand reduction, goals are not applicable and therefore are reflected as “N/A.”

<sup>6</sup> Energy, demand, emissions savings reflects total savings from the ESA Program including California Department of Community Services and Development (CSD) leveraging and multifamily common area measure installations.

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

639 ESA enrollments were received through canvassing efforts, a 29% increase over the prior month's 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 3,767 leads and 1,298 enrollments for the month of March.

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

In March 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 March, five properties were treated for a total of nine properties in 2021. In addition, eight properties are currently receiving measure installations, and 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 to communicate with ESA Program contractors in the language of their preference. In March, nine customers were served by the Language Line.



<b>Language</b>	<b>Calls</b>
Cantonese	1
Tagalog	1
Arabic	3
Vietnamese	3
Mandarin	1
<b>TOTAL</b>	<b>9</b>

### **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 2021 campaign intends to connect with customers to drive conservation and provide monthly savings on their energy bills. 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

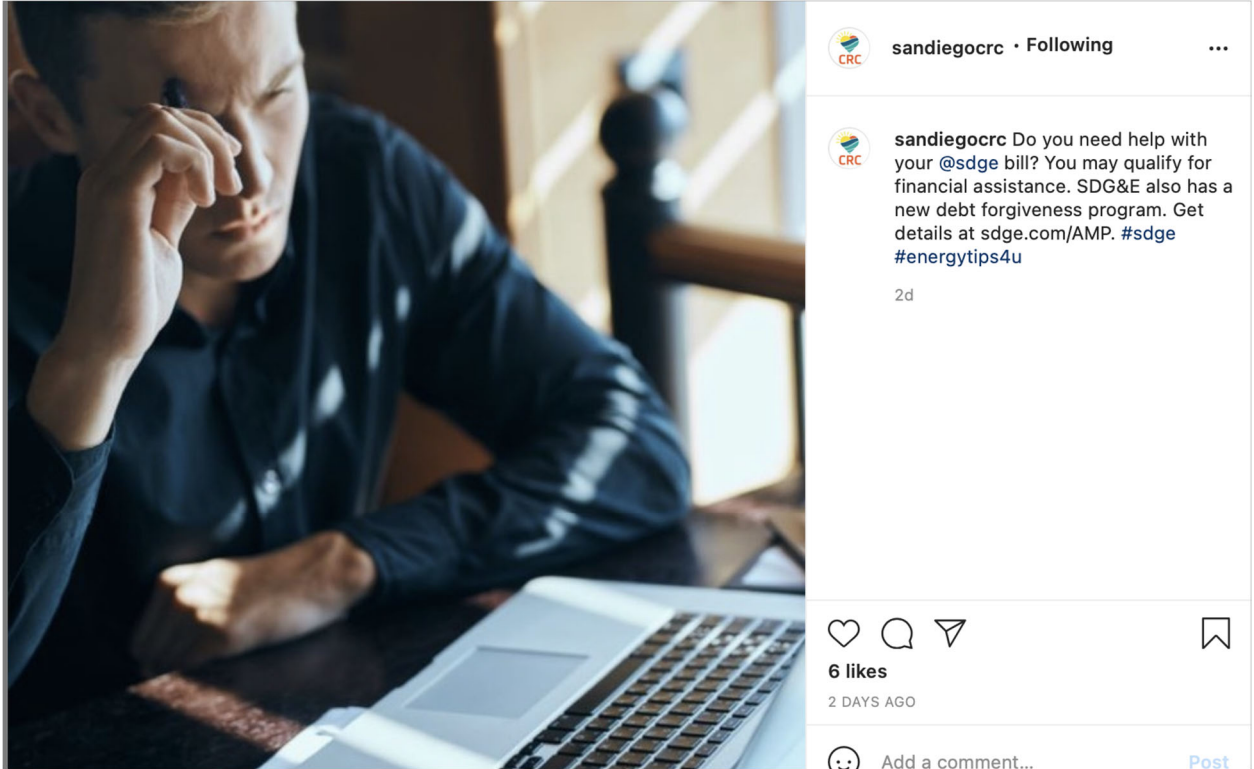
needs, and multilingual/multicultural customers. The tactics for March 2021 are summarized in the following sections:

### Online Advertising

In March 2021, SDG&E continued to run paid search and re-targeted banner ads. Paid search garnered 27,485 impressions with a click-through rate (CTR) of 19%. Re-targeting banner display ads received 851,872 impressions with a CTR of 1.1%. 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 over 220 customer assistance messages in March to an audience of more than 382,000 followers. SDG&E's social media profile also posts messaging to an audience of more than 40,000 followers. These messages are then able to be redistributed to other networks on social media.



**Direct Marketing**

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

Direct Mail

SDG&E continued direct mail efforts and sent 11,598 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 email to promote the ESA Program to potential customers, which was sent to 336,526 customers with a 33% Open Rate and 2.27% CTR.

### Live CARE Call Campaign

SDG&E's third-party contractor, The Harris Group (THG), called targeted customers to enroll in the CARE Program.<sup>8</sup> The campaign provides SDG&E with a way to directly connect with customers in low-income and hard-to-reach areas. THG provides education about the CARE and ESA Programs and assists customers in completing program application forms. Outbound call activities in March 2021 generated the following numbers:

<b>The Harris Group</b>	
ESA Leads	0
CARE Enrollments	1,789
CARE Recertifications <sup>9</sup>	2

### **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

---

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

<sup>9</sup> 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 various tactics, including messaging through email 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 March 2021, SDG&E’s partner outreach activities resulted in the following activities:

<b>Energy Solutions Partner Network</b>	
ESA Leads	1
CARE Enrollments	4
CARE Recertifications <sup>10</sup>	9

Partner Spotlight

In March 2021, SDG&E’s Customer Outreach and Engagement team participated in 22 virtual events, presentations, trainings and 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 programs and solutions such as CARE and ESA and reached over 2,500 people.

---

<sup>10</sup> See *supra* note 9.

## Energy Solutions Partner Activities

### *Southern California Tribal Chairman Association*

On March 21, SDG&E's Outreach team provided virtual training to a group within the Southern California Tribal Chairman Association (SCTCA), known as the California Tribal Temporary Assistance for Needy Families (TANF), which provides resources and assistance to tribal families on various assistance programs. The information presented to TANF was centered around SDG&E's Customer Assistance programs, including CARE, ESA, Medical Baseline, and the Arrearage Management Plan (AMP).<sup>11</sup>

### *Mission Viejo YMCA*

On March 18, SDG&E Outreach virtually presented to members and staff of the Mission Viejo YMCA. The staff has day-to-day interaction with members of the YMCA and can educate members on SDG&E programs and services offered by SDG&E. Information on SDG&E customer assistance programs was provided to this group, as well as program collateral for members.

## Multicultural Outreach

To continue efforts to reduce potential barriers and increase education and program enrollments for customers in the rural, multicultural/multilingual, and

---

<sup>11</sup> See Resolution E-5114, establishing the AMP.

access and functional 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. In March 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 and the distribution of materials through other SDG&E customer-facing groups/programs and field services teams. Updated information related 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 dropbox 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 March 2021, SDG&E’s CCC and Branch Office generated the following applications and leads over the telephone:

	<b>CCC</b>	<b>Branch Office</b>
ESA Leads	23	3
CARE Enrollments	7	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 and March 2021, SDG&E reached out to GRID for a status update on the bi-annual process for this activity. No additional list has been received.

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 directive. The next data-sharing effort will be conducted in 2022.

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.<sup>12</sup> The NDA for this effort expired on December 31, 2020. To continue compliance with this directive, SDG&E has updated and finalized the NDA and has provided it to GRID for review. GRID has indicated, however, that with the sunseting of SASH and the new annual data sharing directive ordered in D.20-12-003, the monthly process may not be necessary. SDG&E and GRID are evaluating the necessity for the data ordered in D.16-11-022 and will determine if the monthly process can be replaced by the new annual process.

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. In March, SDG&E submitted one invoice to SDCWA for 3,044 water-saving measures that totaled \$22,665.

---

<sup>12</sup> D.16-11-022 at 471.

**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 March, LIHEAP organizations generated 150 leads for the ESA Program and enrolled 34 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 March 2021. WE&T online courses are available for contractors via SDG&E's website and email distributions, of which contractors are informed. Additionally, SDG&E included a discussion on all WE&T opportunities to contractors during a virtual ESA Program Contractor meeting, demonstrating how to access class information through SDG&E's website.

SDG&E is also in the process of developing an online training platform for ESA Program 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, and a public webinar for the draft research plan was held on March 5, 2021. Following the webinar, the study team assessed stakeholder comments and refined the research plan. A final research plan, along with responses to stakeholder comments, was posted on April 9, 2021. The study is expected to be complete by December 2022.

### **1.5.2 ESA Program Pilot**

SDG&E is not currently conducting any pilots.

## 2. CARE EXECUTIVE SUMMARY

### 2.1 CARE Program Summary

#### 2.1.1 Please provide CARE Program summary costs.

CARE Budget Categories	Authorized Budget <sup>13</sup>	Actual Expenses to Date	% of Budget Spent
Outreach	\$ 1,627,086	\$ 439,340	27%
Proc., Certification and Verification	\$ 258,606	\$ 199,207	77%
Post Enrollment Verification <sup>14</sup>	\$ 181,833	\$ (34,175)	-19%
Information Tech./Programming	\$ 859,950	\$ 131,092	15%
Pilots-CHANGES	\$ 133,866	\$ 66,729	50%
Regulatory Compliance	\$ 151,826	\$ 83,852	55%
General Administration	\$ 418,123	\$ 129,532	31%
CPUC Energy Division Staff	\$ 28,926	\$ 24,622	85%
Cooling Centers <sup>15</sup>	\$ 0	\$ 0	0%
<b>Total Expenses</b>	<b>\$ 3,660,217</b>	<b>\$ 1,040,199</b>	<b>28%</b>
Subsidies and Benefits <sup>16</sup>	\$ 72,736,422	\$ 40,509,613	56%
<b>Total Program Costs and Discounts</b>	<b>\$ 76,396,638</b>	<b>\$ 41,549,812</b>	<b>54%</b>

---

<sup>13</sup> 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.

<sup>14</sup> Negative amount due to reclassification of labor costs within CARE Program from Post-Enrollment Verification category to Processing, Certification, and Verification.

<sup>15</sup> The funding for SDG&E's Cool Zones is no longer under the CARE Program. See D.17-12-009 at 496 (Ordering Paragraph 114).

<sup>16</sup> Reflects Subsidies and Benefits as authorized in Advice Letter 3620-E, effective January 1, 2021, and Advice Letter 2923-G, effective January 1, 2021.

**2.1.2 Provide the CARE Program penetration rate to date.**

<b>CARE Penetration</b>		
<b>Participants Enrolled</b>	<b>Eligible Participants<sup>17</sup></b>	<b>Penetration Rate</b>
343,087	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 March 2021, marketing and outreach efforts generated 5,104 completed CARE applications and 2,948 new enrollments/recertifications for the program. Below is a summary of CARE specific outreach efforts.

**Direct Marketing**

Direct Mail

In March 2021, SDG&E continued the bill comparison campaign by mailing a comparison letter to 23,865 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.

---

<sup>17</sup> 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 March 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. Due to SDG&E's new Customer Information System launch, SDG&E did not start any new customers in the Nurture Campaign in March. However, SDG&E sent out 136,048 emails (all of these were reminders) to customers already in the Nurture Campaign, which generated a 36% open rate and a 4% CTR 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 March, the following numbers were generated by the Capitation Agencies:

<b>Capitation Agencies</b>	
ESA Leads	46
CARE Enrollments	99
CARE Recertifications <sup>18</sup>	4

#### 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 March, 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

---

<sup>18</sup> See *supra* note 9.

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

<b>HHSA</b>	<b>March</b>	<b>YTD</b>
ESA Leads	0	0
CARE Enrollments	92	201
CARE Recertifications <sup>19</sup>	140	195

## **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 March 2021, SDG&E did not receive any customer complaints regarding CARE recertification.

---

<sup>19</sup> See *supra* note 9.



### 3. CHANGES REPORTING

In compliance with requirements outlined in D.12-12-011<sup>20</sup>, SDG&E has updated CARE Table 10 information for the month of February 2021 and CARE Table 11 for December 2020-February 2021 (Q3). As of June 1, 2020, CARE Table 11 reports have moved from monthly to quarterly for the 2020-2021 CHANGES Program contract year, which does not align with a traditional calendar year and starts in June of each year and ends in May. Accordingly, March 2021 activity for CARE Table 10 and March-May 2021 (Q4) for CARE Table 11 will be sent by CHANGES and reported in a subsequent report.<sup>21</sup>

---

<sup>20</sup> D.12-12-011 at 40-41 (Ordering Paragraph 9)

<sup>21</sup> SDG&E provides data from the previous month due to reporting delays from CHANGES which prevents SDG&E from reporting current month activity.

**4. APPENDIX A – ESA AND CARE PROGRAM TABLES**

**ESA Program** - Table 1 - Program Expenses

**ESA Program** - Table 1A – Program Expenses Funded from 2009-2016 “Unspent ESA Program Funds”

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

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

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

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

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

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

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

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

**ESA Program** - Table 6 - Expenditures for Pilots and Studies

**ESA Program** – Table 7 - Second Refrigerator, In-Home Education,

MyEnergy/MyAccount Platform

**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 11a - CHANGES Group Customer Assistance Sessions**

**CARE Program - Table 11b - CHANGES Group Customer Assistance Sessions**

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

**March 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
<b>Energy Efficiency</b>												
Appliances [3]	\$ 591,000	\$ 143,000	\$ 734,000	\$ 42,351	\$ (8,443)	\$ 33,907	\$ 138,086	\$ 16,604	\$ 154,690	23%	12%	21%
Domestic Hot Water	\$ 21,750	\$ 703,250	\$ 725,000	\$ 4,228	\$ 136,710	\$ 140,938	\$ 9,306	\$ 300,893	\$ 310,199	43%	43%	43%
Enclosure	\$ 879,780	\$ 1,166,220	\$ 2,046,000	\$ 105,997	\$ 140,507	\$ 246,504	\$ 260,795	\$ 345,705	\$ 606,501	30%	30%	30%
HVAC	\$ 256,000	\$ 1,000,000	\$ 1,256,000	\$ 7,229	\$ 316,871	\$ 324,100	\$ 48,153	\$ 655,728	\$ 703,881	19%	66%	56%
Maintenance	\$ 7,845	\$ 110,000	\$ 117,845	\$ 2,734	\$ 241	\$ 2,975	\$ 4,911	\$ 7,888	\$ 12,799	63%	7%	11%
Lighting	\$ 1,800,000	\$ -	\$ 1,800,000	\$ 291,058	\$ -	\$ 291,058	\$ 620,074	\$ -	\$ 620,074	34%	0%	34%
Miscellaneous	\$ 259,000	\$ -	\$ 259,000	\$ 49,433	\$ -	\$ 49,433	\$ 111,732	\$ -	\$ 111,732	43%	0%	43%
Customer Enrollment	\$ 785,000	\$ 785,000	\$ 1,570,000	\$ 93,486	\$ 93,486	\$ 186,973	\$ 205,029	\$ 205,029	\$ 410,057	26%	26%	26%
In Home Education	\$ 145,000	\$ 145,000	\$ 290,000	\$ 31,345	\$ 31,345	\$ 62,690	\$ 50,474	\$ 50,474	\$ 100,948	35%	35%	35%
Contractor Advanced Funds [4]	\$ -	\$ -	\$ -	\$ (3,824)	\$ (3,824)	\$ (7,647)	\$ (186,446)	\$ (186,446)	\$ (372,892)	0%	0%	0%
Pilot	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
<b>Energy Efficiency TOTAL [5]</b>	<b>\$ 4,745,375</b>	<b>\$ 4,052,470</b>	<b>\$ 8,797,845</b>	<b>\$ 624,037</b>	<b>\$ 706,893</b>	<b>\$ 1,330,930</b>	<b>\$ 1,262,115</b>	<b>\$ 1,395,875</b>	<b>\$ 2,657,990</b>	<b>27%</b>	<b>34%</b>	<b>30%</b>
Training Center	\$ 42,500	\$ 42,500	\$ 85,000	\$ 2,237	\$ 2,237	\$ 4,474	\$ 5,331	\$ 5,331	\$ 10,662	0%	0%	0%
Inspections	\$ 40,000	\$ 40,000	\$ 80,000	\$ 7,288	\$ 7,288	\$ 14,575	\$ 13,253	\$ 13,253	\$ 26,506	33%	33%	33%
Marketing and Outreach	\$ 235,000	\$ 235,000	\$ 470,000	\$ 27,493	\$ 27,493	\$ 54,986	\$ 523	\$ 523	\$ 1,046	0%	0%	0%
Statewide Marketing Education and Outreach	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Studies	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Regulatory Compliance [6]	\$ 77,250	\$ 77,250	\$ 154,500	\$ 10,738	\$ 10,738	\$ 21,476	\$ (5,509)	\$ (5,509)	\$ (11,017)	-7%	-7%	-7%
General Administration	\$ 558,367	\$ 558,367	\$ 1,116,734	\$ 93,093	\$ 93,093	\$ 186,186	\$ 363,113	\$ 363,112	\$ 726,225	65%	65%	65%
CPUC Energy Division	\$ 12,500	\$ 12,500	\$ 25,000	\$ 1,059	\$ 1,059	\$ 2,118	\$ 5,276	\$ 5,276	\$ 10,553	42%	42%	42%
Reallocation (ME&O budget reduced from \$1.2M)			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
<b>TOTAL PROGRAM COSTS</b>	<b>\$ 5,710,992</b>	<b>\$ 5,018,087</b>	<b>\$ 10,729,079</b>	<b>\$ 765,945</b>	<b>\$ 848,801</b>	<b>\$ 1,614,747</b>	<b>\$ 1,644,102</b>	<b>\$ 1,777,862</b>	<b>\$ 3,421,964</b>	<b>29%</b>	<b>35%</b>	<b>32%</b>
<b>Funded Outside of ESA Program Budget</b>												
Indirect Costs				\$ 47,636	\$ 48,064	\$ 95,700	\$ 117,338	\$ 115,415	\$ 232,752			
NGAT Costs		\$ 144,000	\$ 144,000		\$ 19,048	\$ 19,048		\$ 31,133	\$ 31,133		22%	22%

[1] Authorized budget does not include shifted funds from previous years and/or program cycles. Shifted funds, referred to as "2009-2016 Unspent ESA Program Funds", are reflected in ESA Table 1A.

[2] Reflects authorized funding approved in the CPUC Energy Division Disposition Letter dated 12/27/2018 approving SDG&E Advice Letter 3250-E/2688-G, and updated for bridge funding under Advice Letter 3620-E/2323-G.

[3] Negative Current Month Gas amount due to reclass/correction posted in the month of March.

[4] Negative amounts result of Advanced Funds returned to SDG&E in the month of March.

[5] Current Month Expenses for Energy Efficiency Total includes March accruals and/or re-accruals of \$308,390 in the following reporting categories: Appliances \$0; Domestic Hot Water \$21,169; Enclosure \$19,082; HVAC \$20,547; Maintenance \$0; Lighting \$101,462; Miscellaneous \$25,576; Customer Enrollment \$95,968; In Home Energy Education \$24,586.

[6] Negative YTD amounts result of labor corrections related to PY2020, posted in Feb 2020.

**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**  
**March 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
<b>Energy Efficiency</b>												
Multi-Family Common Area Measures	\$ 2,811,132	\$ 2,811,132	\$ 5,622,263	\$ 93,420	\$ 93,420	\$ 186,839	\$ 325,238	\$ 60,037	\$ 385,274	12%	2%	7%
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	\$ (622)	\$ (622)	\$ (1,244)	\$ 877	\$ 877	\$ 1,755	2%	2%	2%
Regulatory Compliance												
General Administration												
<b>TOTAL PROGRAM BUDGET/EXPENSES</b>	<b>\$ 2,865,472</b>	<b>\$ 2,865,472</b>	<b>\$ 5,730,943</b>	<b>\$ 92,797</b>	<b>\$ 92,797</b>	<b>\$ 185,595</b>	<b>\$ 326,115</b>	<b>\$ 60,914</b>	<b>\$ 387,029</b>	<b>11%</b>	<b>2%</b>	<b>7%</b>

[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. Current Month negative amount due to reimbursements received from other IOU's related to Non-Energy Benefits Impact

**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

March 2021

ESA Program (Summary) Total																													
Year-To-Date Completed & Expensed Installation							ESA Program (First Touch Homes Treated)							ESA Program (Re-Treated Homes/Go Backs)							ESA Program (Aliso Canyon - SCG & SCE) [6]								
Measures	Units	Quantity Installed	kWh [4] (Annual)	kW [4] (Annual)	Therms [4] (Annual)	Expenses (\$) [7]	% of Expenditure	Units	Quantity Installed	kWh[4] (Annual)	kW[4] (Annual)	Therms[4] (Annual)	Expenses (\$)	% of Expenditure	Units	Quantity Installed	kWh[4] (Annual)	kW[4] (Annual)	Therms[4] (Annual)	Expenses (\$)	% of Expenditure	Units	Quantity Installed	kWh[4] (Annual)	kW[4] (Annual)	Therms[4] (Annual)	Expenses (\$)	% of Expenditure	
		(K+S)	(L+T)	(M+U)	(N+V)	(O+W)	(K+S)		(L+T)	(M+U)	(N+V)	(O+W)	(K+S)	(L+T)		(M+U)	(N+V)	(O+W)	(K+S)	(L+T)	(M+U)		(N+V)	(O+W)	(K+S)	(L+T)	(M+U)	(N+V)	(O+W)
<b>Appliances</b>																													
High Efficiency Clothes Washer	Each	36	489	0	630	34,658	1.5%	Each	10	185	0	171	\$ 9,755	975480.0%	Each	26	304	0	459	\$ 24,904	1.9%	Each							
Refrigerator	Each	123	75,608	9	-	111,144	4.8%	Each	40	26,860	3	-	\$ 36,359	3635876.0%	Each	83	48,748	6	-	\$ 74,786	5.6%	Each							
Microwave [5]	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	\$ -	0.0%	Each							
<b>Domestic Hot Water</b>																													
Other Domestic Hot Water[3]	Home	1,045	5,854	1	3,212	85,000	3.6%	Home	450	2,497	0	1,400	\$ 36,532	3.7%	Home	595	3,357	0	1,812	\$ 48,468	3.6%	Home							
Water Heater Tank and Pipe Insulation	Home	149	-	-	144	9,457	0.4%	Home	85	-	-	72	\$ 5,746	0.6%	Home	64	-	-	72	\$ 3,712	0.3%	Home							
Water Heater Repair/Replacement	Home	257	-	-	5,963	154,605	6.6%	Home	130	-	-	2,848	\$ 51,443	5.2%	Home	127	-	-	3,115	\$ 103,162	7.7%	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	1	-	-	2	105	0.0%	Each	1	-	-	2	\$ 105	0.0%	Each	-	-	-	-	\$ -	0.0%	Each							
New - Thermostat-controlled Shower Valve	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each							
<b>Enclosure[1]</b>																													
Air Sealing	Home	1,130	22,568	5	556	442,905	19.0%	Home	513	14,768	3	319	\$ 208,644	21.0%	Home	617	7,800	2	237	\$ 234,260	17.5%	Home							
Caulking	Home	-	-	-	-	-	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%	Home							
Attic Insulation	Home	23	1,505	0	770	32,545	1.4%	Home	12	860	0	385	\$ 16,997	1.7%	Home	11	645	0	385	\$ 15,548	1.2%	Home							
<b>HVAC</b>																													
FAU Standing Pilot Conversion	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each							
Furnace Repair/Replacement	Each	344	-	-	(6,700)	520,047	22.3%	Each	155	-	-	(3,438)	\$ 174,402	17.5%	Each	189	-	-	(3,262)	\$ 345,645	25.8%	Each							
Room A/C Replacement	Each	22	(1,116)	(0)	-	21,831	0.9%	Each	1	(186)	(0)	-	\$ 694	0.1%	Each	21	(930)	(0)	-	\$ 21,137	1.6%	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	29	-	-	138	4,377	0.2%	Home	15	-	-	78	\$ 2,091	0.2%	Home	14	-	-	60	\$ 2,286	0.2%	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	60	8,423	-	381	25,040	1.1%	Home	37	5,547	-	246	\$ 15,400	1.5%	Home	23	2,876	-	135	\$ 9,640	0.7%	Home							
<b>Maintenance</b>																													
Furnace Clean and Tune	Home	327	-	-	(573)	26,305	1.1%	Home	144	-	-	(303)	\$ 11,903	1.2%	Home	183	-	-	(270)	\$ 14,402	1.1%	Home							
Central A/C Tune up	Home	-	-	-	-	-	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%	Home							
<b>Lighting</b>																													
Interior Hard wired LED fixtures	Each	1,030	4,357	1	(77)	86,479	3.7%	Each	458	1,937	0	(35)	\$ 38,454	3.9%	Each	572	2,420	0	(42)	\$ 48,025	3.6%	Each							
Exterior Hard wired LED fixtures	Each	576	2,961	0	-	41,731	1.8%	Each	303	1,557	0	-	\$ 21,952	2.2%	Each	273	1,403	0	-	\$ 19,779	1.5%	Each							
LED Torchiers	Each	1,144	4,839	1	(88)	105,490	4.5%	Each	474	2,005	0	(36)	\$ 43,551	4.4%	Each	670	2,834	0	(51)	\$ 61,939	4.6%	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	1,246	3,763	0	(66)	20,189	0.9%	Each	872	2,633	0	(46)	\$ 14,129	1.4%	Each	374	1,129	0	(20)	\$ 6,060	0.5%	Each							
New - LED A-Lamps	Each	12,858	27,259	3	(474)	189,793	8.1%	Each	6,950	14,734	2	(248)	\$ 102,574	10.3%	Each	5,908	12,525	2	(226)	\$ 87,220	6.5%	Each							
<b>Miscellaneous</b>																													
Pool Pumps	Each	1	-	-	-	1,937	0.1%	Each	1	-	-	-	\$ 1,937	0.2%	Each	-	-	-	-	\$ -	0.0%	Each							
Smart Strip	Each	203	28,420	4	-	9,912	0.4%	Each	114	15,960	2	-	\$ 5,715	0.6%	Each	89	12,460	2	-	\$ 4,197	0.3%	Each							
Smart Strip Tier II	Each	690	96,600	14	-	60,184	2.6%	Each	344	48,160	7	-	\$ 30,861	3.1%	Each	346	48,440	7	-	\$ 29,323	2.2%	Each							
<b>Pilots</b>																													
<b>Customer Enrollment</b>																													
ESA Outreach & Assessment	Home	2,404	-	-	-	\$ 275,412	11.8%	Home	1,158	-	-	-	\$ 129,461	13.0%	Home	1,246	-	-	-	\$ 145,951	10.9%	Home							
ESA In-Home Energy Education	Home	2,405	-	-	-	\$ 72,800	3.1%	Home	1,158	-	-	-	\$ 35,108	3.5%	Home	1,247	-	-	-	\$ 37,692	2.8%	Home							
<b>Total Savings/Expenditures</b>			281,529	37	3,818	\$ 2,331,948				137,518	19	1,415	\$ 993,813.89				144,012	19	2,403	\$ 1,338,134									
<b>Total Households Weatherized [2]</b>		519							624																				
<b>Households Treated</b>	Total (K+S)							First Touches							Re-treated Homes/Go-Backs							Aliso Canyon							
- Single Family Households Treated	Home	930						Home	557						Home	373						Home							
- Multi-family Households Treated	Home	1,106						Home	408						Home	698						Home							
- Mobile Homes Treated	Home	271						Home</																					

**Energy Savings Assistance Program Table 2A  
SDG&E  
March 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
<b>Appliances</b>							
High Efficiency Clothes Washer	Each	-	-	-	-	\$ -	0.0%
Refrigerators	Each	-	-	-	-	\$ -	0.0%
Microwaves [4]	Each	-	-	-	-	\$ -	0.0%
<b>Domestic Hot Water</b>							
Water Heater Blanket	Home	-	-	-	-	\$ -	0.0%
Low Flow Shower Head	Home	-	-	-	-	\$ -	0.0%
Water Heater Pipe Insulation	Home	-	-	-	-	\$ -	0.0%
Faucet Aerator	Home	-	-	-	-	\$ -	0.0%
Water Heater Repair/Replacement	Each	-	-	-	-	\$ -	0.0%
Thermostatic Shower Valve	Each	-	-	-	-	\$ -	0.0%
Combined Showerhead/TSV	Each	-	-	-	-	\$ -	0.0%
Heat Pump Water Heater	Each	-	-	-	-	\$ -	0.0%
Tub Diverter/ Tub Spout	Each	-	-	-	-	\$ -	0.0%
Thermostat-controlled Shower Valve	Each	-	-	-	-	\$ -	0.0%
<b>Enclosure</b>							
Air Sealing / Envelope [1]	Home	-	-	-	-	\$ -	0.0%
Caulking	Home	-	-	-	-	\$ -	0.0%
Attic Insulation	Home	-	-	-	-	\$ -	0.0%
<b>HVAC</b>							
FAU Standing Pilot Conversion	Each	-	-	-	-	\$ -	0.0%
Furnace Repair/Replacement	Each	-	-	-	-	\$ -	0.0%
Room A/C Replacement	Each	-	-	-	-	\$ -	0.0%
Central A/C replacement	Each	-	-	-	-	\$ -	0.0%
Heat Pump Replacement	Each	-	-	-	-	\$ -	0.0%
Evaporative Cooler (Replacement)	Each	-	-	-	-	\$ -	0.0%
Evaporative Cooler (Installation)	Each	-	-	-	-	\$ -	0.0%
Duct Testing and Sealing	Home	-	-	-	-	\$ -	0.0%
Energy Efficient Fan Control	Home	-	-	-	-	\$ -	0.0%
Prescriptive Duct Sealing	Home	-	-	-	-	\$ -	0.0%
High Efficiency Forced Air Unit (HE FAU)	Home	-	-	-	-	\$ -	0.0%
A/C Time Delay	Home	-	-	-	-	\$ -	0.0%
<b>Maintenance</b>							
Furnace Clean and Tune	Home	-	-	-	-	\$ -	0.0%
Central A/C Tune up	Home	-	-	-	-	\$ -	0.0%
<b>Lighting</b>							
Interior Hard wired LED fixtures	Each	-	-	-	-	\$ -	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%
<b>Miscellaneous</b>							
Pool Pumps	Each	-	-	-	-	\$ -	0.0%
Smart Power Strips - Tier 1	Each	-	-	-	-	\$ -	0.0%
Smart Power Strips - Tier 2	Each	-	-	-	-	\$ -	0.0%
<b>Pilots</b>							
<b>Customer Enrollment</b>							
Outreach & Assessment	Home	-	-	-	-	\$ -	0.0%
In-Home Education	Home	-	-	-	-	\$ -	0.0%
<b>Total Savings/Expenditures</b>							
			-	-	-	\$ -	0.0%
<b>Total Households Weatherized [2]</b>							
<b>CSD MF Tenant Units Treated</b>							
			<b>Total</b>				
			-				

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

[1] Envelope and Air Sealing Measures may include outlet cover plate gaskets, attic access weatherization, weatherstripping - door, caulking and minor home repairs. Minor home repairs predominantly are door jamb repair / replacement, door repair, and window putty.

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

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

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

March 2021

Table 2B ESA Program - Multifamily Common Area Measures <sup>5</sup>						
ESA CAM Measures <sup>[1]</sup>	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)
<b>Appliances</b>						
<b>Domestic Hot Water</b>						
Central Boiler**	Cap-kBTU/h	1,100	2	-	-	3,408 \$ 54,581
Faucet Aerator	Each	7	-	162	0	19 \$ 55
Pipe Insulation	Home	1	-	-	-	8 \$ 286
<b>Envelope</b>						
<b>HVAC</b>						
AC Tune-up**	Cap-Tons	5	-	72	0	-
Furnace Replacement**	Cap-kBTU/h	-	-	-	-	\$ -
HEAT Pump Split System**	Cap-Tons	-	-	-	-	\$ -
HEAT Pump Split System	Each	-	-	-	-	\$ -
Programmable Thermostat	Each	-	-	-	-	\$ -
<b>Lighting</b>						
Exterior LED Lighting	Fixture	482	-	32,249	-	-
Exterior LED Lighting - Pool	Lamp	-	-	-	-	\$ -
Interior LED Exit Sign	Fixture	-	-	-	-	\$ -
Interior LED Fixture	Fixture	599	-	113,379	28	(258) \$ 70,442
Interior LED Lighting	Lamp	68	-	1,585	0	(1) \$ 6,818
Interior LED Screw-in	Lamp	85	-	3,953	1	(14) \$ 1,144
Interior TLED Type A Lamps	Lamp	261	-	9,812	2	(36) \$ 3,393
Interior TLED Type C Lamps	Lamp	497	-	18,684	5	(143) \$ 13,841
<b>Miscellaneous</b>						
Tier-2 Smart Power Strip	Each					
Variable Speed Pool Pump	Each					
<b>Ancillary Services</b>						
Audit <sup>4</sup>		9				\$ 13,080
<b>Total</b>				179,896	36	2,984 \$ 254,326

Multifamily Properties Treated	Number
Total Number of Multifamily Properties Treated <sup>2</sup>	9
Subtotal of Master-metered Multifamily Properties Treated	5
Total Number of Multifamily Tenant Units w/in Properties Treated <sup>3</sup>	624

[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  
March 2021**

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

Standard Notes (do not delete)

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

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

2. Only complete if measure is canceled or discontinued

3. Defined as CEC California Building Climate Zones

[https://www.energy.ca.gov/maps/renewable/building\\_climate\\_zones.html](https://www.energy.ca.gov/maps/renewable/building_climate_zones.html)

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

<b>Table 3A-1, ESA Program</b>	
Annual kWh Savings	281,529
Annual Therm Savings	3,818
Lifecycle kWh Savings	2,601,954
Lifecycle Therm Savings	(20,122)
Current kWh Rate	\$ 0.19
Current Therm Rate	\$ 1.12
Average 1st Year Bill Savings / Treated households	\$ 23.57
Average Lifecycle Bill Savings / Treated Household	\$ 192.13

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

<b>Table 3A-3, Summary - ESA Program/CSD Leveraging</b>	
Annual kWh Savings	281,529
Annual Therm Savings	3,818
Lifecycle kWh Savings	2,601,954
Lifecycle Therm Savings	(20,122)
Current kWh Rate	\$ 0.19
Current Therm Rate	\$ 1.12
Average 1st Year Bill Savings / Treated Households	\$ 23.57
Average Lifecycle Bill Savings / Treated Households	\$ 192.13

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

<b>Table 3B, ESA Program - Multifamily Common Area</b>	
Annual kWh Savings	179,896
Annual Therm Savings	2,984
Lifecycle kWh Savings	1,627,746
Lifecycle Therm Savings	63,921
Current kWh Rate	\$0.19
Current Therm Rate	\$1.12
Average 1st Year Bill Savings / Treated Property	\$ 4,092.33
Average Lifecycle Bill Savings / Treated Property	\$ 41,607.17

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

<b>Table 4A-1, ESA Program</b>						
	<b>Eligible Households</b>			<b>Households Treated YTD</b>		
<b>County</b>	<b>Rural [1]</b>	<b>Urban</b>	<b>Total</b>	<b>Rural</b>	<b>Urban</b>	<b>Total</b>
Orange	0	2	2	0	0	0
San Diego	135	2,170	2,305	0	0	0
<b>Total</b>	<b>135</b>	<b>2,172</b>	<b>2,307</b>	<b>0</b>	<b>0</b>	<b>0</b>

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

<b>Table 4C, ESA Program - Multifamily Common Area</b>						
	<b>*</b>			<b>Properties Treated YTD</b>		
<b>-</b>				<b>-</b>	<b>-</b>	<b>Total</b>
Orange	-	-	-	-	-	-
San Diego	-	-	-	-	9	9
<b>Total</b>					<b>9</b>	<b>9</b>

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

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

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

**Energy Savings Assistance Program Table 4A-2, Homes Unwilling / Unable to Participate  
SDG&E  
March 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	8	12	1	0	44	0	2
San Diego	983	1,136	2	0	1,049	52	42
<b>Total</b>	<b>991</b>	<b>1,148</b>	<b>3</b>	<b>0</b>	<b>1,093</b>	<b>52</b>	<b>44</b>

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

**Energy Savings Assistance Program Table 5 - Energy Savings Assistance Program Customer Summary**  
**SDG&E**  
**March 2021**

<b>Table 5A, ESA Program</b>																		
Month	Gas & Electric				Gas Only			Electric Only			Total							
	# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Annual)			# of Household Treated by Month	(Household Count)		(Annual)		
		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW		# of First-Touch	# of Re-treatment	Therm	kWh	kW
January	57	244	21,476	3	-	-	-	-	1	-	1,734	0	58	30	28	244	23,209	3
February	515	1,780	81,842	11	-	-	-	-	28	-	8,279	1	543	242	301	1,780	90,121	12
March	1,598	1,795	153,039	20	-	-	-	-	108	-	15,160	2	1,706	845	861	1,795	168,199	22
April					-	-	-	-										
May					-	-	-	-										
June					-	-	-	-										
July					-	-	-	-										
August					-	-	-	-										
September					-	-	-	-										
October					-	-	-	-										
November					-	-	-	-										
December					-	-	-	-										
<b>YTD</b>	<b>2,170</b>	<b>3,818</b>	<b>256,357</b>	<b>34</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>137</b>	<b>-</b>	<b>25,173</b>	<b>3</b>	<b>2,307</b>	<b>1,117</b>	<b>1,190</b>	<b>3,818</b>	<b>281,529</b>	<b>37</b>

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

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

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

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

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

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

<b>Table 5C, ESA Program - Multifamily Common Area</b>																		
Month	Gas & Electric				Gas Only			Electric Only			Total							
	# of Properties Treated by Month	(Annual)			# of Properties Treated by Month	(Annual)			# of Properties Treated by Month	(Annual)			# of Properties Treated by Month	(Annual)				
		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW		Therm	kWh	kW		
January	1	(130)	13,195	3	-	-	-	-	3	-	55,395	9	4	(130)	68,590	12		
February																		
March	5	3,113.48	111,305.54	23.99	-	-	-	-	-	-	0	0	5	3,113	111,306	24		
April					-	-	-	-										
May					-	-	-	-										
June					-	-	-	-										
July					-	-	-	-										
August					-	-	-	-										
September					-	-	-	-										
October					-	-	-	-										
November					-	-	-	-										
December					-	-	-	-										
<b>YTD</b>	<b>6</b>	<b>2,984</b>	<b>124,501</b>	<b>27</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>3</b>	<b>-</b>	<b>55,395</b>	<b>9</b>	<b>9</b>	<b>2,984</b>	<b>179,896</b>	<b>36</b>		

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  
March 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
<b>Pilots</b>												
Programmable Communicating Thermostat (PCT) [2]	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
<b>Total Pilots</b>	\$ -	\$ -	\$ -			\$ -			\$ -	0%	0%	0%
<b>Studies</b>												
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 [4]	\$ 54,340	\$ 54,340	\$ 108,680	\$ (622)	\$ (622)	\$ (1,244)	\$ 877	\$ 877	\$ 1,755	2%	2%	2%
<b>Total Studies</b>	\$ 54,340	\$ 54,340	\$ 108,680	\$ (622)	\$ (622)	\$ (1,244)	\$ 877	\$ 877	\$ 1,755	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].

[4] Current Month negative amount due to reimbursements received from other IOU's related to Non-Energy Benefits Impact Assessment.

**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  
March 2021**

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

<b>7B - Households Receiving In- Home Energy Education Only</b>		
<b>Measures</b>	<b>Units</b>	<b>Households that Only Received Energy Education</b>
In-Home Education	Home	98

<b>7C - Households for My Energy/My Account Platform - YTD</b>		
<b>Opt-Out</b>	<b>Already Enrolled</b>	<b>Opt-In</b>
2,584	1,454	73

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

		B-C			E x F				(B)-(cumulative H + cumulative I)
	Total Advance Eligible for PPRS Credit [1]	Total Advance Not Eligible for PPRS Credit	Percentage for PPRS Credit Calculation [2]	Total Contractor Invoices each month[3,8]	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%	\$ -	\$ -	\$ -	\$ -	
<b>Total</b>	<b>\$1,169,041</b>	<b>\$528,535</b>	<b>\$640,506</b>	<b>40%</b>	<b>\$ 1,042,062</b>	<b>\$ 356,802</b>	<b>\$ -</b>	<b>\$ 626,465</b>	<b>\$ 542,576</b>

**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  
March 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	\$ 233,835	\$ 31,887	\$ 265,722	\$ 386,619	\$ 52,721	\$ 439,340	27%	29%	27%
Processing / Certification Re-certification	\$ 230,159	\$ 28,447	\$ 258,606	\$ 59,736	\$ 8,146	\$ 67,881	\$ 175,302	\$ 23,905	\$ 199,207	76%	84%	77%
Post Enrollment Verification [2]	\$ 161,832	\$ 20,002	\$ 181,833	\$ -	\$ -	\$ -	\$ (30,074)	\$ (4,101)	\$ (34,175)	-19%	-21%	-19%
IT Programming	\$ 765,355	\$ 94,594	\$ 859,950	\$ 82,340	\$ 11,228	\$ 93,569	\$ 115,361	\$ 15,731	\$ 131,092	15%	17%	15%
Cooling Centers	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Pilots/CHANGES Program [3]	\$ 119,141	\$ 14,725	\$ 133,866	\$ 46,621	\$ 6,357	\$ 52,979	\$ 58,721	\$ 8,007	\$ 66,729	49%	54%	50%
Studies [4]	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Regulatory Compliance	\$ 135,125	\$ 16,701	\$ 151,826	\$ 27,632	\$ 3,768	\$ 31,400	\$ 73,790	\$ 10,062	\$ 83,852	55%	60%	55%
General Administration	\$ 372,130	\$ 45,994	\$ 418,123	\$ 43,771	\$ 5,969	\$ 49,740	\$ 113,988	\$ 15,544	\$ 129,532	31%	34%	31%
CPUC Energy Division [5]	\$ 25,744	\$ 3,182	\$ 28,926	\$ 4,349	\$ 593	\$ 4,942	\$ 21,668	\$ 2,955	\$ 24,622	84%	93%	85%
<b>SUBTOTAL MANAGEMENT COSTS</b>	<b>\$ 3,257,593</b>	<b>\$ 402,624</b>	<b>\$ 3,660,217</b>	<b>\$ 498,285</b>	<b>\$ 67,948</b>	<b>\$ 566,233</b>	<b>\$ 915,376</b>	<b>\$ 124,824</b>	<b>\$ 1,040,199</b>	<b>28%</b>	<b>31%</b>	<b>28%</b>
CARE Rate Discount [6]	\$60,763,500	\$11,972,922	\$ 72,736,422	\$10,994,226	\$2,446,449	\$ 13,440,675	\$33,179,920	\$7,329,693	\$ 40,509,613	55%	61%	56%
<b>TOTAL PROGRAM COSTS &amp; CUSTOMER DISCOUNTS</b>	<b>\$ 64,021,093</b>	<b>\$ 12,375,545</b>	<b>\$ 76,396,638</b>	<b>\$ 11,492,511</b>	<b>\$ 2,514,397</b>	<b>\$ 14,006,908</b>	<b>\$ 34,095,295</b>	<b>\$ 7,454,517</b>	<b>\$ 41,549,812</b>	<b>53%</b>	<b>60%</b>	<b>54%</b>
Other CARE Rate Benefits												
- DWR Bond Charge Exemption				\$644,236		\$ 644,236	\$2,174,370		\$ 2,174,370			
- CARE Surcharge Exemption				\$833,811	\$ 293,160	\$ 1,126,971	\$2,732,114	\$ 898,909	\$ 3,631,023			
- California Solar Initiative Exemption				\$0		\$ -	\$0		\$ -			
- kWh Surcharge Exemption				\$27,037		\$ 27,037	\$81,641		\$ 81,641			
- Vehicle Grid Integration Exemption				\$71,255		\$ 71,255	\$245,162		\$ 245,162			
<b>Total Other CARE Rate Benefits [7]</b>				<b>\$ 1,576,339</b>	<b>\$ 293,160</b>	<b>\$ 1,869,499</b>	<b>\$ 5,233,288</b>	<b>\$ 898,909</b>	<b>\$ 6,132,197</b>			
Indirect Costs				\$ 68,865	\$ 9,391	\$ 78,255	\$ 172,271	\$ 23,492	\$ 195,763			

[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, & Penetration<sup>5</sup>**  
**SDG&E**  
**March 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 <sup>4</sup>	Failed PEV	Failed Recertification	Other	Total Attrition (P+Q+R+S)	Gross (K+O)				Net Adjusted (K-T)
	Inter-Utility <sup>1</sup>	Intra-Utility <sup>2</sup>	Leveraging <sup>3</sup>	Combined (B+C+D)	Online	Paper	Phone	Capitation	Combined (F+G+H+I)															
<b>January</b>	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	<b>342,367</b>	293,584	117%
<b>February</b>	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	<b>343,623</b>	293,584	117%
<b>March</b>	8	32	0	40	2,165	418	129	48	2,760	2,800	21	197	0	218	0	0	0	3,336	3,336	3,018	-536	<b>343,087</b>	293,584	117%
<b>April</b>	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		293,584	0%
<b>May</b>	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		293,584	0%
<b>June</b>	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		293,584	0%
<b>July</b>	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		293,584	0%
<b>August</b>	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		293,584	0%
<b>September</b>	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		293,584	0%
<b>October</b>	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		293,584	0%
<b>November</b>	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		293,584	0%
<b>December</b>	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		293,584	0%
<b>YTD Total</b>	<b>44</b>	<b>115</b>	<b>0</b>	<b>159</b>	<b>9,204</b>	<b>1,789</b>	<b>967</b>	<b>228</b>	<b>12,188</b>	<b>12,347</b>	<b>21</b>	<b>2,021</b>	<b>0</b>	<b>2,042</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>7,856</b>	<b>7,856</b>	<b>14,389</b>	<b>4,491</b>	<b>343,087</b>	<b>293,584</b>	<b>117%</b>

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

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

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

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

**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**

**March 2021**

Month	Total CARE Households Enrolled	Households Requested to Verify <sup>1</sup>	% of CARE Enrolled Requested to Verify Total	CARE Households De-enrolled (Due to no response)	CARE Households De-enrolled (Verified as Ineligible) <sup>2</sup>	Total Households De-enrolled <sup>3</sup>	% De-enrolled through Post Enrollment Verification <sup>4</sup>	% 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	343,087	0	0.0%	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%
<b>YTD Total</b>	<b>343,087</b>	<b>0</b>	<b>0.0%</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0.0%</b>	<b>0.0%</b>

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

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

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

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

**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 <sup>1, 5</sup>	% of CARE Enrolled Requested to Verify Total	CARE Households De-enrolled (Due to no response) <sup>2</sup>	CARE Households De-enrolled (Verified as Ineligible) <sup>2</sup>	Total Households De-enrolled <sup>2,3</sup>	% De-enrolled through Post Enrollment Verification <sup>4</sup>	% 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	343,087	46	0.0%	0	0	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%
<b>YTD Total</b>	<b>343,087</b>	<b>46</b>	<b>0.0%</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0.0%</b>	<b>0.0%</b>

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

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

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

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

<sup>5</sup> 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 Applications<sup>1</sup>**  
**SDG&E**  
**March 2021**

	Provided	Received	Approved	Denied	Pending/Never Completed	Duplicates
Total (Y-T-D)	1,090	25,720	15,361	3,747	114	6,498
Percentage		100%	60%	15%	0%	25%

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

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

**CARE Table 5 - Enrollment by County  
SDG&E  
March 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	14,910	0	14,910	79%	0%	79%
San Diego	267,760	6,880	274,640	320,637	7,540	328,177	120%	110%	119%
<b>Total</b>	<b>286,704</b>	<b>6,880</b>	<b>293,584</b>	<b>335,547</b>	<b>7,540</b>	<b>343,087</b>	<b>117%</b>	<b>110%</b>	<b>117%</b>

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

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

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

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

**CARE Table 6 - Recertification Results  
SDG&E  
March 2021**

Month	Total CARE Households	Households Requested to Recertify <sup>1,5</sup>	% of Households Total (C/B)	Households Recertified <sup>2</sup>	Households De-enrolled <sup>3</sup>	Recertification Rate % <sup>4</sup> (E/C)	% of Total Households De-enrolled (F/B)
January	342,367	0	0.0%	0	0	0.0%	0.0%
February	343,623	7	0.0%	0	0	0.0%	0.0%
March	343,087	180	0.1%	8	0	4.4%	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%
<b>YTD</b>	<b>343,087</b>	<b>187</b>	<b>0.1%</b>	<b>8</b>	<b>0</b>	<b>4.3%</b>	<b>0.0%</b>

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

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

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

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

<sup>5</sup> Customers can manually request to recertify but are automatically placed in the COVID protection category as authorized in Resolution M-4842.

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

**CARE Table 7 - Capitation Contractors<sup>1</sup>**  
**SDG&E**  
**March 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			34	192
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
LA MAESTRA FAMILY CLINIC		X		X	-	-
MAAC PROJECT		X			-	1
NEIGHBORHOOD HEALTH CARE	X				-	1
NORTH COUNTY HEALTH SERVICES		X			-	-
SAN DIEGO STATE UNIVERSITY WIC OFFICES		X			1	8
SAN YSIDRO HEALTH CENTERS		X			-	-
SCRIPPS HEALTH WIC		X			-	-
UNION OF PAN ASIAN COMMUNITIES SAN DIEGO(UPAC)		X			-	-
VISTA COMMUNITY CLINIC		X			-	-
<b>Total Enrollments</b>					<b>35</b>	<b>204</b>

<sup>1</sup> All capitation contractors with current contracts are listed regardless of whether they have signed up customers or submitted invoices this year.

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

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

<b>Month</b>	<b>Gas and Electric</b>	<b>Gas Only</b>	<b>Electric Only</b>	<b>Total</b>	<b>Eligible Households<sup>1</sup></b>	<b>Penetration</b>	<b>% Change</b>	<b>Total Residential Accounts<sup>2</sup></b>
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	217,173	0	125,914	343,087	293,584	117%	-0.2%	1,360,611
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%	
<b>YTD</b>	<b>217,173</b>	<b>0</b>	<b>125,914</b>	<b>343,087</b>	<b>293,584</b>	<b>117%</b>	<b>0.0%</b>	<b>1,360,611</b>

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

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

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



**CARE Program Table 9 - Expenditures for Pilots/CHANGES Program<sup>1</sup>**  
**SDG&E**  
**March 2021**

2021	Authorized 2021 Budget <sup>2</sup>	Current Month Expenses	Expenses Since Jan. 1, 2021	% of 2021 Budget Expended
	Total	Total	Total	Total
CHANGES Program	\$ 133,866	\$ 52,979	\$ 66,729	50%
<b>Total</b>	<b>\$ 133,866</b>	<b>\$ 52,979</b>	<b>\$ 66,729</b>	<b>50%</b>

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.

<b>CARE Table 10 CHANGES One-On-One Customer Assistance Sessions San Diego Gas &amp; Electric</b>	
<b>Reporting Period February 2021[1]</b>	
<b>No. of attendees at education sessions</b>	<b>198</b>
<b>Disputes</b>	
Add Level Pay Plan	0
Assisted with CARE Re-Certification/Audit	0
Changed 3rd party Company/Gas Aggregation	0
Changed 3rd Party Electricity Aggregation	0
Enroll in Energy Assistance Programs	0
High Energy CARE User	0
Medical Baseline Application	0
Payment Extension	0
Payment Plan	0
Request Bill Adjustment	0
Request Customer Service Visit	0
Request Meter Service or Testing	0
Schedule Energy Audit	0
Solar	0
Stop Disconnection	0
Time of Use	0
Wildfire Related Issue	0
<b>Total disputes [3]</b>	<b>0</b>

<b>Needs Assistance</b>	
Add/Remove Level Pay Plan	0
Arrearage Management Plan (AMP)	3
Assisted with CARE Re-Certification/Audit	0
Assisted with Changes to Account	0
Assisted High Energy User with CARE Doc Submission	0
Assisted with Reconnection	0
Billing Language Changed	0
CARE Enrollment	0
Consumer Education Only	0
Electricity Aggregation	0
Energy Alerts	0
Energy Efficiency Tool	0
Enrolled in Demand Response Programs	0
ESAP	0
HEAP/LIHEAP	0
Medical Baseline	0
Neighbor to Neighbor	5
Payment Extension	4
Payment Plan	4
REACH	0
Reported Safety Problem	0
Reported Scam	0
Set Up 3rd Party Notification	0
Set Up New Account	0
Wildfire Related Issue	0
<b>Total Needs Assistance [2]</b>	<b>16</b>

**Education:** Education sessions were held in a mix of one on one, and group sessions. Education materials are available as fact sheets on the CPUC Website: [http://consumers.cpuc.ca.gov/team\\_and\\_changes/](http://consumers.cpuc.ca.gov/team_and_changes/)

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

[1] There is a one-month lag behind the current reporting month. The data for March 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 prior months and may reflect YTD adjustments.

## CARE Table 11 CHANGES Group Customer Assistance Sessions

### SDG&E

Q3 December 2020 [1,2]

Date <sup>3</sup>	Session Language	Description of Service Provided (e.g. utility bill assistance, utility bill dispute resolution, and other energy related issues)	Session Logistics			
			# of Sessions	Length (Hours) <sup>4</sup>	Number of Attendees	Description of Information / Literature Provided
N/A	Arabic	Understanding Your Bill	9	N/A	83	CHANGES Ed Handout
N/A	English	Understanding Your Bill	9	N/A	85	CHANGES Ed Handout
Current Month			18		168	
Year-to-Date			424		2432	

[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 Q4 March 1, 2021 through May 31, 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.

## CARE Table 11 CHANGES Group Customer Assistance Sessions

### SDG&E

Q3 January-February 2021 [1,2]

Date <sup>3</sup>	Session Language	Description of Service Provided (e.g. utility bill assistance, utility bill dispute resolution, and other energy related issues)	Session Logistics			
			# of Sessions	Length (Hours) <sup>4</sup>	Number of Attendees	Description of Information / Literature Provided
N/A	Arabic	Understanding Your Bill	17	N/A	150	CHANGES Ed Handout
N/A	English	Understanding Your Bill	15	N/A	153	CHANGES Ed Handout
N/A	Spanish	Understanding Your Bill	1	N/A	45	CHANGES Ed Handout
Current Month			33		348	
Year-to-Date			33		348	

[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 Q4 March 1, 2021 through May 31, 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.