

**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 MAY 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

E-Mail: [rhansson@sdge.com](mailto:rhansson@sdge.com)

June 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 MAY 2021**

This is the fifth 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<sup>1</sup> and expenditures through May 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

E-Mail: [rhansson@sdge.com](mailto:rhansson@sdge.com)

June 21, 2021

---

<sup>1</sup> Pursuant to Rule 16.6 of the Commission's Rules of Practice and Procedure, on May 12, 2021, SDG&E submitted a request to Rachel Peterson, Executive Director for the California Public Utilities Commission, for an extension of time until July 21, 2021, to provide CARE Program data due to unforeseen issues in relation to the cut over to SDG&E's recently implemented Customer Information System (CIS), also known as Envision. The extension was granted on May 21, 2021. Accordingly, CARE Program data for the months of April and May will be filed on July 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 ESA Program Overview ..... 1

1.1.1 Provide a summary of the ESA Program elements as approved in Decision (D.) 16-11-022. .... 3

1.2 ESA Program Customer Outreach and Enrollment Update..... 3

1.2.1 Provide a summary of the ESA Program outreach and enrollment strategies deployed this month..... 3

1.2.2 Customer Assistance Marketing, Education and Outreach for the CARE and ESA Programs..... 5

1.3 Leveraging Success Evaluation, Including CSD ..... 12

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? ..... 13

1.4 Workforce Education & Training (WE&T)..... 14

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..... 14

1.5 Miscellaneous ..... 14

1.5.1 ESA Program Studies ..... 14

1.5.2 ESA Program Pilot..... 14

2. CARE EXECUTIVE SUMMARY ..... 15

2.1 CARE Program Summary..... 15

3. CHANGES REPORTING ..... 15

4. APPENDIX A – ESA AND CARE PROGRAM TABLES ..... 16

## ENERGY SAVINGS ASSISTANCE PROGRAM MONTHLY REPORT

### 1. ESA PROGRAM EXECUTIVE SUMMARY

#### 1.1. ESA Program Overview

In Guidance Decision (D.) 19-06-022, the California Public Utilities Commission (CPUC or 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. On April 15, 2021, San Diego Gas & Electric Company (SDG&E) filed the ESA Bridge Funding Advice Letter to demonstrate completion of the interim progress milestones and request funding for second half of 2021.<sup>3</sup> In addition, the Commission issued the *Proposed Decision on Large Investor-Owned Utilities' and Marin Clean Energy's California Alternate Rates for Energy (CARE), Energy Savings Assistance (ESA), and Family Electric Rates for Energy (FERA) Program Applications for Program Years 2021-2026 on April 26, 2021*.<sup>4</sup> Accordingly, the authorized program budgets and homes treated goals in this monthly report reflect the six-month

---

<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> SDG&E Advice Letter 3740-E/2970-G was suspended for up to 120 days by the Commission's Energy Division beginning May 16, 2021 for additional staff review.

<sup>4</sup> Updates regarding the Commission's June 3, 2021 approval of the final decision (D.21-06-015) will be provided in next month's report for June activity.

bridge period and will be revised once the Commission approves the utility applications for 2021 and beyond or authorized bridge funding for the second half of 2021,<sup>5</sup> whichever occurs first.

### 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>6</sup> SDG&E had five contractors who accepted advance payments and are eligible to earn PPRS credits. As of May, SDG&E is pleased to report that all five ESA contractors have earned the full PPRS eligible amounts. Additionally, all but one contractor has repaid the excess amount of the advance payment used for items not eligible for PPRS credits. The contractor continues to make payments and is expected to repay the ineligible amount prior to December 31, 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. In May, SDG&E's largest O&A contractor reported a decline in enrollments due to an increase in field representatives being out sick due to COVID-19 vaccination reactions.

---

<sup>5</sup> “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.

<sup>6</sup> See Resolution E-5074 at 10 which states “[T]he IOUs should provide a 30 day advance notice to contractors of when the six-month PPRS credit-earning period begins.” The IOUs consist of Pacific Gas and Electric Company, SDG&E, Southern California Gas Company, and Southern California Edison Company.

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

<b>ESA Program Summary through May 2021</b>			
	<b>2021 Authorized / Planning Assumptions<sup>7</sup></b>	<b>Actual to Date</b>	<b>%</b>
Budget <sup>8</sup>	\$ 16,460,022	\$6,572,193	40%
Homes Treated <sup>9</sup>	5,973	4,466	75%
kWh Saved	N/A	495,387	N/A
kW Demand Reduced	N/A	66	N/A
Therms Saved	N/A	7,158	N/A
GHG Emissions Reduced (Tons)	N/A	314	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 this month. Joint CARE and ESA Programs marketing, education and outreach efforts are provided in section 1.2.2 below.

ESA Program Contractor Outreach

As previously discussed, SDG&E’s largest O&A contractor reported a significant decline in ESA Program enrollments for the month of May due to employee absences related to reactions to the COVID-19 vaccine. During this month, 610 ESA enrollments were received through canvassing efforts, which is a 33% decrease over the prior month activity. Contractors are also

---

<sup>7</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. The energy savings and demand reduction goals are not applicable and therefore are reflected as “N/A.”

<sup>8</sup> The Budget category reflects the authorized budget and actual expenditures for both the ESA Program and ESA CAM.

<sup>9</sup> Total homes treated reflects homes that have been invoiced and paid. There was no CSD leveraging.

continuing to leverage SDG&E marketing efforts to make initial telephone contacts with customers to enroll and schedule in-home appointments. Overall, ESA Program marketing, education, and outreach efforts were successful in creating 3,545 leads and 1,029 enrollments.

ESA Program Multifamily Common Area Measure (MF CAM) Initiative

In May 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. Two properties were treated this month for a total of 14 properties in 2021. In addition, six properties are currently receiving measure installations and 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. As detailed in the table below, nine customers were served by the Language Line this month.

<b>Language</b>	<b>Calls</b>
Cantonese	2
Farsi	1
Khmer	1
Spanish	2
Mandarin	1
Korean	1
Vietnamese	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 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 leveraged this month are summarized in the following sections:

##### Online Advertising

SDG&E started a planned digital advertising campaign. Paid Search continued to run and garnered 146,111 impressions with a click-through-rate (CTR) of 19.5%. Banner display ads for May received 6,993,525 impressions with a CTR of 1%. Native online advertising had 306,020 impressions with a CTR of 0.4%.

## Social Media

Using e-newsletters, website posts, and social media channels, the Energy Solutions Partner Network shared over 145 customer assistance messages to an audience of more than 400,000 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 May 2021, direct marketing efforts included the following tactics:

### Email

SDG&E sent an e-mail to promote the ESA Program to potential customers, which was sent to 888,296 customers with a 29% Open Rate and 2% 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>10</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 generated the following numbers this month:

<b>The Harris Group<sup>11</sup></b>	
ESA Leads	0
CARE Enrollments	N/A
CARE Recertifications <sup>12</sup>	N/A

---

<sup>10</sup> THG is a Diverse Business Enterprise (DBE) vendor and a woman-owned business.

<sup>11</sup> Pursuant to Rule 16.6, on May 12, 2021, SDG&E submitted a request for extension of time to comply for certain CARE data in the April 2021 and May 2021 Low Income Monthly Reports (A.14-11-007 et al) due to SDG&E's recent Customer Information System (Envision) upgrade on April 5, 2021. The request for extension was approved on May 21, 2021.

<sup>12</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.

## Community Outreach & Engagement

### Energy Solutions Partner Network

SDG&E works closely with a network of approximately 200 community-based organizations (CBOs) to connect customers with programs and solutions related to Customer Assistance, Energy Efficiency and Conservation, SDG&E's COVID-19 response, Public Safety Power Shutoff (PSPS) resiliency, and wildfire preparedness. These organizations represent the diversity of SDG&E's customers within its service territory. A majority of these CBOs are small, grassroots agencies serving customers with access and functional needs, including those that are multicultural, multilingual, low income, seniors, and LEP audiences in communities of concern. 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. SDG&E's partner outreach activities resulted in the following activities this month:

<b>Energy Solutions Partner Network<sup>13</sup></b>	
ESA Leads	4
CARE Enrollments	N/A
CARE Recertifications <sup>14</sup>	N/A

---

<sup>13</sup> Pursuant to Rule 16.6, on May 12, 2021, SDG&E submitted a request for extension of time to comply for certain CARE data in the April 2021 and May 2021 Low Income Monthly Reports (A.14-11-007 et al) due to SDG&E's recent Customer Information System (Envision) upgrade on April 5, 2021. The request for extension was approved on May 21, 2021.

<sup>14</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.

### Partner Spotlight

SDG&E's Customer Outreach and Engagement team participated in 18 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 3,600 people.

#### *San Diego Chapter of the Black American Political Association of California*

In May, SDG&E Outreach presented to the San Diego Chapter of the Black American Political Association of California (BAPAC SD), which is an organization that works to ensure the economic, social, and political force of the Black community in San Diego County remains relevant. The presentation included information on SDG&E's COVID-19 response and programs that can assist customers with their bills. Other topics covered included the Emergency Rental Assistance Program (ERAP), CARE, ESA, Medical Baseline (MBL), and the Arrearage Management Payment (AMP) Plan.<sup>15</sup>

---

<sup>15</sup> See Resolution E-5114, establishing the AMP.

*City of San Diego*

This month, the SDG&E Outreach team continued its monthly presentation to seniors for the Senior Wellness Center of the City of San Diego. Topics presented included various customer assistance programs such as CARE, ESA, and Medical Baseline.

Multicultural Outreach

To continue efforts to reduce potential barriers and increase education and program enrollments for customers in the rural, multicultural/multilingual, and 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. During this reporting month, SDG&E participated in the following four multicultural community outreach events:

<b>Date</b>	<b>Event Name</b>	<b>Partner/Host</b>	<b>Location</b>
5/8/2021	Labor Council Food Distribution	San Diego Labor Council	Palomar College
5/8/2021	Wildfire Safety Fair	SDG&E	Mountain Empire High School
5/22/2021	Labor Council Food Distribution	San Diego Labor Council	Southwest High School
5/28/2021	ERAP Sign Up	San Diego Labor Council	San Diego Labor Council

*Rent and Utility Assistance Event*

On May 28, in partnership with the San Diego Housing Commission and San Diego and Imperial Counties Labor Council, SDG&E hosted a walk-up ERAP enrollment event with over 350 attendees where iPads and dedicated staff were available to provide support to customers enrolling in assistance programs. Information on ERAP and other utility bill assistance

programs, such as CARE and AMP, was also shared with and provided to attendees. SDG&E also invited a CARE capitation partner, Horn of Africa, to help with direct CARE enrollments. In total, SDG&E was able to assist with enrolling nearly 60 customers in ERAP and 40 in CARE.

### **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. During this reporting month, SDG&E’s CCC and Branch Office generated the following applications and leads over the telephone:<sup>16</sup>

	<b>CCC</b>	<b>Branch Office</b>
ESA Leads	10	1
CARE Enrollments	N/A	N/A
CARE	N/A	N/A

**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. This leveraging effort generated seven ESA Program leads and no enrollments this month.

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>17</sup> The

---

<sup>16</sup> Pursuant to Rule 16.6, on May 12, 2021, SDG&E submitted a request for extension of time to comply for certain CARE data in the April 2021 and May 2021 Low Income Monthly Reports (A.14-11-007 et al) due to SDG&E’s recent Customer Information System (Envision) upgrade on April 5, 2021. The request for extension was approved on May 21, 2021.

<sup>17</sup> D.16-11-022 at 471.



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. However, GRID has indicated that due to the new annual data sharing directive establish for DAC-SASH in D.20-12-003 and the sunseting of the SASH programthe monthly SASH data share process may not be necessary. SDG&E and GRID continue to evaluate 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. During this reporting month, SDG&E did not submit any invoices to SDCWA for water savings measures.

**1.3.1. Please provide a status of the leveraging effort with CSD. What new steps or programs have been implemented? What were the results in terms of new enrollments?**

SDG&E continues to partner closely with local Low-Income Home Energy Assistance Program (LIHEAP) agencies to improve leveraging opportunities between CSD's LIHEAP and the ESA Program. Both San Diego LIHEAP contractors, 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. During this reporting month, LIHEAP organizations generated 158 leads and enrolled 56 customers for the ESA Program.

#### **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 this month. WE&T online courses are available for contractors via SDG&E's website and email distributions, of which contractors are informed.

SDG&E continues to make progress in the development of an online training platform for ESA Program contractor education which will provide consistent outreach and assessment training. SDG&E anticipates having a module in place mid-2021 with initial contractor training by third quarter 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 will be completed by December 2022. In May, the study team continued to discuss refinements to the sampling plan based on stakeholder comments received during the March 5 webinar.

##### **1.5.2. ESA Program Pilot**

SDG&E is not currently conducting any pilots.

## **2. CARE EXECUTIVE SUMMARY**

### **2.1. CARE Program Summary**

Pursuant to Rule 16.6 of the Commission's Rules of Practice and Procedure, on May 12, 2021, SDG&E submitted a request to Rachel Peterson, Executive Director for the California Public Utilities Commission, for extension of time to provide CARE Program data due to unforeseen issues in relation to the cut over to SDG&E's recently implemented Customer Information System (CIS), also known as Envision. SDG&E requested approval for an extension on the CARE data portion of the April and May Monthly Activity Reports to be filed July 21, 2021 (due May 21 and June 21, respectively). The extension was granted on May 21, 2021. Accordingly, CARE Program data for the month of May will be filed on July 21, 2021.

## **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 April 2021. 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, CARE Table 10 activity for May 2021 and CARE Table 11 activity for Q4 March-May 2021 will be sent by CHANGES and reported in a subsequent report.<sup>18</sup>

---

<sup>18</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 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**

**May 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	\$ 591,000	\$ 143,000	\$ 734,000	\$ 30,014	\$ 3,871	\$ 33,884	\$ 186,256	\$ 26,054	\$ 212,311	32%	18%	29%
Domestic Hot Water	\$ 21,750	\$ 703,250	\$ 725,000	\$ 3,065	\$ 99,116	\$ 102,182	\$ 14,468	\$ 467,805	\$ 482,273	67%	67%	67%
Enclosure	\$ 879,780	\$ 1,166,220	\$ 2,046,000	\$ 87,283	\$ 115,701	\$ 202,984	\$ 422,775	\$ 560,422	\$ 983,197	48%	48%	48%
HVAC	\$ 256,000	\$ 1,000,000	\$ 1,256,000	\$ 32,572	\$ 185,407	\$ 217,979	\$ 111,342	\$ 1,009,246	\$ 1,120,588	43%	101%	89%
Maintenance	\$ 7,845	\$ 110,000	\$ 117,845	\$ -	\$ 38,650	\$ 38,650	\$ 4,911	\$ 46,538	\$ 51,449	63%	42%	44%
Lighting	\$ 1,800,000	\$ -	\$ 1,800,000	\$ 223,654	\$ -	\$ 223,654	\$ 1,034,885	\$ -	\$ 1,034,885	57%	0%	57%
Miscellaneous	\$ 259,000	\$ -	\$ 259,000	\$ 53,603	\$ -	\$ 53,603	\$ 212,910	\$ -	\$ 212,910	82%	0%	82%
Customer Enrollment	\$ 785,000	\$ 785,000	\$ 1,570,000	\$ 127,639	\$ 127,639	\$ 255,278	\$ 437,576	\$ 437,576	\$ 875,151	56%	56%	56%
In Home Education	\$ 145,000	\$ 145,000	\$ 290,000	\$ 27,527	\$ 27,527	\$ 55,053	\$ 104,288	\$ 104,288	\$ 208,576	72%	72%	72%
Contractor Advanced Funds [3]	\$ -	\$ -	\$ -	\$ (500)	\$ (500)	\$ (1,000)	\$ (188,280)	\$ (188,280)	\$ (376,560)	0%	0%	0%
Pilot	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
<b>Energy Efficiency TOTAL [4]</b>	<b>\$ 4,745,375</b>	<b>\$ 4,052,470</b>	<b>\$ 8,797,845</b>	<b>\$ 584,856</b>	<b>\$ 597,411</b>	<b>\$ 1,182,267</b>	<b>\$ 2,341,130</b>	<b>\$ 2,463,650</b>	<b>\$ 4,804,780</b>	<b>49%</b>	<b>61%</b>	<b>55%</b>
Training Center	\$ 42,500	\$ 42,500	\$ 85,000	\$ 2,094	\$ 2,094	\$ 4,189	\$ 9,329	\$ 9,329	\$ 18,658	22%	22%	22%
Inspections	\$ 40,000	\$ 40,000	\$ 80,000	\$ 5,584	\$ 5,584	\$ 11,169	\$ 29,674	\$ 29,674	\$ 59,349	74%	74%	74%
Marketing and Outreach	\$ 235,000	\$ 235,000	\$ 470,000	\$ 26,005	\$ 26,005	\$ 52,010	\$ 47,716	\$ 47,716	\$ 95,431	20%	20%	20%
Statewide Marketing Education and Outreach	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Studies	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Regulatory Compliance	\$ 77,250	\$ 77,250	\$ 154,500	\$ 8,422	\$ 8,422	\$ 16,844	\$ 6,857	\$ 6,856	\$ 13,713	9%	9%	9%
General Administration	\$ 558,367	\$ 558,367	\$ 1,116,734	\$ 56,702	\$ 56,702	\$ 113,404	\$ 491,687	\$ 491,687	\$ 983,374	88%	88%	88%
CPUC Energy Division	\$ 12,500	\$ 12,500	\$ 25,000	\$ 1,267	\$ 1,267	\$ 2,535	\$ 7,685	\$ 7,685	\$ 15,369	61%	61%	61%
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>\$ 684,931</b>	<b>\$ 697,486</b>	<b>\$ 1,382,417</b>	<b>\$ 2,934,078</b>	<b>\$ 3,056,596</b>	<b>\$ 5,990,674</b>	<b>51%</b>	<b>61%</b>	<b>56%</b>
<b>Funded Outside of ESA Program Budget</b>												
Indirect Costs				\$ 35,076	\$ 35,141	\$ 70,217	\$ 195,786	\$ 193,804	\$ 389,590			
NGAT Costs		\$ 144,000	\$ 144,000		\$ 20,747	\$ 20,747		\$ 73,161	\$ 73,161		51%	51%

[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 amounts are a result of Advanced Funds credited back to SDG&E.

[4] Current Month Expenses for Energy Efficiency Total includes May accruals and/or re-accruals of \$664,434 in the following reporting categories: Appliances \$0; Domestic Hot Water \$33,232; Enclosure \$226; HVAC \$51,896; Maintenance \$26,270; Lighting \$165,513; Miscellaneous \$57,533; Customer Enrollment \$265,273; In Home Energy Education \$64,401.

**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**  
**May 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	\$ 46,633	\$ 46,633	\$ 93,267	\$ 415,123	\$ 149,922	\$ 565,045	15%	5%	10%
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	\$ 6,204	\$ 6,204	\$ 12,409	\$ 8,237	\$ 8,237	\$ 16,474	15%	15%	15%
Regulatory Compliance	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
General Administration	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
<b>TOTAL PROGRAM BUDGET/EXPENSES</b>	<b>\$ 2,865,472</b>	<b>\$ 2,865,472</b>	<b>\$ 5,730,943</b>	<b>\$ 52,838</b>	<b>\$ 52,838</b>	<b>\$ 105,675</b>	<b>\$ 423,360</b>	<b>\$ 158,159</b>	<b>\$ 581,519</b>	<b>15%</b>	<b>6%</b>	<b>10%</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**  
**May 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 & Expensed Installation						Units	Year-To-Date Completed & Expensed Installation					Units	Year-To-Date Completed & Expensed Installation					Units	Year-To-Date Completed & Expensed Installation					
		Quantity Installed	kWh [4] (Annual)	kW [4] (Annual)	Therms [4] (Annual)	Expenses (\$) [7]	% 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)
<b>Appliances</b>		(K+S)	(L+T)	(M+U)	(N+V)	(O+W)																				
High Efficiency Clothes Washer	Each	47	489	0	839	45,159	1.1%	Each	8	185	0	136	\$ 7,804	0.5%	Each	39	304	0	703	\$ 37,355	1.5%	Each				
Refrigerator	Each	175	106,182	13	-	158,264	3.8%	Each	51	32,498	4	-	\$ 47,417	2.8%	Each	124	73,684	9	-	\$ 110,848	4.4%	Each				
Microwave [5]	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each				
<b>Domestic Hot Water</b>																										
Other Domestic Hot Water[3]	Home	1,680	10,210	1	5,061	137,320	3.3%	Home	668	4,085	1	2,041	\$ 55,884	3.3%	Home	1,012	6,125	1	3,020	\$ 81,436	3.3%	Home				
Water Heater Tank and Pipe Insulation	Home	234	-	-	200	15,091	0.4%	Home	119	-	-	104	\$ 7,914	0.5%	Home	115	-	-	96	\$ 7,177	0.3%	Home				
Water Heater Repair/Replacement	Home	571	-	-	13,390	292,823	7.0%	Home	281	-	-	5,965	\$ 107,207	6.4%	Home	290	-	-	7,425	\$ 185,617	7.5%	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	12	-	-	24	1,264	0.0%	Each	5	-	-	10	\$ 527	0.0%	Each	7	-	-	14	\$ 737	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	1,917	37,128	8	959	809,772	19.4%	Home	816	21,840	5	490	\$ 354,382	21.1%	Home	1,101	15,288	3	469	\$ 455,390	18.3%	Home				
Caulking	Home	-	-	-	-	-	0.0%	Home	-	-	-	-	\$ -	0.0%	Home	-	-	-	-	\$ -	0.0%	Home				
Attic Insulation	Home	46	2,150	0	1,400	61,362	1.5%	Home	24	860	0	770	\$ 33,896	2.0%	Home	22	1,290	0	630	\$ 27,466	1.1%	Home				
<b>HVAC</b>																										
FAU Standing Pilot Conversion	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	-	-	-	-	\$ -	0.0%	Each				
Furnace Repair/Replacement	Each	693	-	-	(12,945)	830,438	19.9%	Each	306	-	-	(6,235)	\$ 262,584	15.6%	Each	387	-	-	(6,710)	\$ 567,854	22.8%	Each				
Room A/C Replacement	Each	55	(3,162)	(1)	-	60,136	1.4%	Each	10	(1,116)	(0)	-	\$ 11,105	0.7%	Each	45	(2,046)	(0)	-	\$ 49,031	2.0%	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	63	-	-	306	9,549	0.2%	Home	35	-	-	174	\$ 5,272	0.3%	Home	28	-	-	132	\$ 4,277	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	105	13,618	-	657	43,860	1.1%	Home	58	7,491	-	374	\$ 24,140	1.4%	Home	47	6,127	-	283	\$ 19,720	0.8%	Home				
<b>Maintenance</b>																										
Furnace Clean and Tune	Home	731	-	-	(1,431)	59,686	1.4%	Home	347	-	-	(759)	\$ 29,150	1.7%	Home	384	-	-	(672)	\$ 30,536	1.2%	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	1,718	7,267	1	(130)	144,243	3.5%	Each	685	2,898	0	(53)	\$ 57,513	3.4%	Each	1,033	4,370	1	(77)	\$ 86,731	3.5%	Each				
Exterior Hard wired LED fixtures	Each	915	4,703	1	-	66,292	1.6%	Each	443	2,277	0	-	\$ 32,095	1.9%	Each	472	2,426	0	-	\$ 34,196	1.4%	Each				
LED Torchiere	Each	1,994	8,435	1	(151)	183,739	4.4%	Each	798	3,376	0	(61)	\$ 73,009	4.3%	Each	1,196	5,059	1	(90)	\$ 110,730	4.4%	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	2,249	6,792	1	(117)	36,446	0.9%	Each	1,530	4,621	1	(78)	\$ 24,796	1.5%	Each	719	2,171	0	(39)	\$ 11,651	0.5%	Each				
New - LED A-Lamps	Each	24,639	52,235	6	(904)	363,722	8.7%	Each	12,463	26,422	3	(444)	\$ 183,925	10.9%	Each	12,176	25,813	3	(461)	\$ 179,797	7.2%	Each				
<b>Miscellaneous</b>																										
Pool Pumps	Each	1	-	-	-	1,937	0.0%	Each	-	-	-	-	\$ -	0.0%	Each	1	-	-	-	\$ 1,937	0.1%	Each				
Smart Strip	Each	458	64,120	9	-	23,375	0.6%	Each	229	32,060	4	-	\$ 11,984	0.7%	Each	229	32,060	4	-	\$ 11,390	0.5%	Each				
Smart Strip Tier II	Each	1,323	185,220	26	-	115,342	2.8%	Each	622	87,080	12	-	\$ 55,984	3.3%	Each	701	98,140	14	-	\$ 59,358	2.4%	Each				
<b>Pilots</b>																										
<b>Customer Enrollment</b>																										
ESA Outreach & Assessment	Home	4,630				\$ 571,069	13.7%	Home	2,027				\$ 232,507	13.8%	Home	2,603				\$ 338,562	13.6%	Home				
ESA In-Home Energy Education	Home	4,636				\$ 140,613	3.4%	Home	2,027				\$ 61,396	3.7%	Home	2,609				\$ 79,217	3.2%	Home				
<b>Total Savings/Expenditures</b>			495,387	66	7,158	\$ 4,171,503				224,575	30	2,434	\$ 1,680,489.16				270,811	36	4,723	\$ 2,491,014					\$ -	
<b>Total Households Weatherized [2]</b>		1,931							822						1,109											
<b>Households Treated</b>	Total (K+S)							First Touches							Re-treated Homes/Go-Backs											
- Single Family Households Treated	Home	1,683						Home	976					Home	707											
- Multi-family Households Treated	Home	2,258						Home	720					Home	1,538											
- Mobile Homes Treated	Home	525						Home	278					Home	247											
<b>Total Number of Households Treated</b>	Home	4,466						Home	1,974					Home	2,492											
<b># Eligible Households to be Treated for PY [3]</b>	Home	5,973						Home	N/A					Home	N/A											
<b>% of Households Treated</b>	%	75%						%	N/A					%	N/A											
- Master-Meter Households Treated	Home	269						Home	90					Home	179											

[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.

**Energy Savings Assistance Program Table 2A  
SDG&E  
May 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 reflect [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  
May 2021

Table 2B ESA Program - Multifamily Common Area Measures <sup>5</sup>								
Year-To-Date Completed & Expensed Installation								
	Units (of Measure such as "each")	Quantity Installed	Number of Units for Cap-kBTUh and Cap-Tons	kWh (Annual)	kW (Annual)	Therms (Annual)	Expenses (\$)	% of Expenditure
<b>ESA CAM Measures[1]</b>								
<b>Appliances</b>								
<b>Domestic Hot Water</b>								
Central Boiler**	Cap-kBTUh	1,100	2	-	-	3,408	\$ 54,581	
Faucet Aerator	Each	14		325	0	19	\$ 110	
Pipe Insulation	Home	1		-	-	8	\$ 286	
<b>Envelope</b>								
<b>HVAC</b>								
AC Tune-up**	Cap-Tons	5		72	0	-	\$ 619	
Furnace Replacement**	Cap-kBTUh	-	-	-	-	-	\$ -	
HEAT Pump Split System**	Cap-Tons	-	-	-	-	-	\$ -	
HEAT Pump Split System	Each	4		162	0	(0)	\$ 14,105	
Programmable Thermostat	Each	-	-	-	-	-	\$ -	
<b>Lighting</b>								
Exterior LED Lighting	Fixture	770		51,500	-	-	\$ 140,076	
Exterior LED Lighting - Pool	Lamp	-	-	-	-	-	\$ -	
Interior LED Exit Sign	Fixture	-	-	-	-	-	\$ -	
Interior LED Fixture	Fixture	905		170,209	41	(323)	\$ 106,487	
Interior LED Lighting	KiloLumen	329		7,667	2	(1)	\$ 32,986	
Interior LED Screw-in	Lamp	211		3,953	1	(14)	\$ 2,393	
Interior TLED Type A Lamps	Lamp	330		12,406	3	(60)	\$ 4,290	
Interior TLED Type C Lamps	Lamp	557		20,940	5	(149)	\$ 15,512	
<b>Miscellaneous</b>								
Tier-2 Smart Power Strip	Each							
Variable Speed Pool Pump	Each							
<b>Ancillary Services</b>								
Audit <sup>4</sup>		11					\$ 14,850	
<b>Total</b>	-	4,237		267,233	52	2,888	\$ 386,294	

Multifamily Properties Treated	Number
<b>Total Number of Multifamily Properties Treated<sup>2</sup></b>	14
<b>Subtotal of Master-metered Multifamily Properties Treated</b>	4
<b>Total Number of Multifamily Tenant Units w/in Properties Treated<sup>3</sup></b>	1160

[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] Per D.16-11-022 at p.210, the CPUC imposes a cap of 10% on ESA CAM Initiative funds for administrative activities and a ceiling of 20% for direct implementation non-incentive costs.  
[5] Refers to optimizing the installation of the measure installed such as retrofitting pipes, etc.  
\* Note: Applicable to Deed-Restricted, government and non-profit owned multi-family buildings described in D.16-11-022 where 65% of tenants are income eligible based on CPUC income  
Note: Any required corrections/adjustments are reported herein and supersede results reported in prior months and may reflect YTD adjustments.  
Note: Implementation of the MF CAM Initiative AL 3196-E-A\_2654-G-A was approved effective 5/30/2018.  
\*\* Note: This represents the unit of measure such as Cap Tons and Cap kBTUh. It is not a count of each measure installed or each home the measure was intalled in.

**Energy Savings Assistance CAM Program Table 2B-1, Eligible Common Area Measures  
List  
SDG&E  
May 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  
May 2021**

<b>Table 3A-1, ESA Program</b>	
Annual kWh Savings	495,387
Annual Therm Savings	7,158
Lifecycle kWh Savings	4,360,121
Lifecycle Therm Savings	-37,158
Current kWh Rate	\$0.19
Current Therm Rate	\$1.12
Average 1st Year Bill Savings / Treated households	\$21.62
Average Lifecycle Bill Savings / Treated Household	\$166.19

<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	495,387
Annual Therm Savings	7,158
Lifecycle kWh Savings	4,360,121
Lifecycle Therm Savings	(37,158)
Current kWh Rate	\$ 0.19
Current Therm Rate	\$ 1.12
Average 1st Year Bill Savings / Treated Households	\$ 21.62
Average Lifecycle Bill Savings / Treated Households	\$ 166.19

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

<b>Table 3B, ESA Program - Multifamily Common Area</b>	
Annual kWh Savings	267,233
Annual Therm Savings	2,888
Lifecycle kWh Savings	2,422,069
Lifecycle Therm Savings	63,029
Current kWh Rate	\$0.19
Current Therm Rate	\$1.12
Average 1st Year Bill Savings / Treated Property	\$3,784.87
Average Lifecycle Bill Savings / Treated Property	\$37,242.09

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

Table 4A-1, ESA Program						
County	Eligible Households			Households Treated YTD		
	Rural [1]	Urban	Total	Rural	Urban	Total
Orange	0	19	19	0	0	0
San Diego	226	4,221	4,447	0	0	0
<b>Total</b>	<b>226</b>	<b>4,240</b>	<b>4,466</b>	<b>0</b>	<b>0</b>	<b>0</b>

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

Table 4C, ESA Program - Multifamily Common Area						
County	*			Properties Treated YTD		
						Total
-				-	-	-
Orange	-	-	-	-	-	-
San Diego	-	-	-	-	14	14
<b>Total</b>					<b>14</b>	<b>14</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  
May 2021**

<b>ESA Program</b>		<b>Reason Provided</b>					
<b>County</b>	<b>Customer Unwilling/Declined Program Measures</b>	<b>Customer Unavailable - Scheduling Conflicts</b>	<b>Hazardous Environment (unsafe/unclean)</b>	<b>Landlord Refused to Authorize Participation</b>	<b>Household Exceeds Allowable Limits</b>	<b>Unable to Provide Required Documentation</b>	<b>Other Infeasible/ Ineligible</b>
Orange	65	21	1	0	61	0	13
San Diego	3,397	4,311	7	0	1,913	150	423
<b>Total</b>	<b>3,462</b>	<b>4,332</b>	<b>8</b>	<b>0</b>	<b>1,974</b>	<b>150</b>	<b>436</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**  
**May 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	1,781	81,842	11	-	-	-	-	28	-	8,279	1	543	242	301	1,781	90,121	12
March	1,617	1,796	153,039	20	-	-	-	-	108	-	15,526	2	1,725	851	874	1,796	168,565	22
April	1,060	678	94,752	13	-	-	-	-	77	-	8,028	1	1,137	475	662	678	102,780	14
May	918	2,659	99,773	13	-	-	-	-	85	-	10,939	1	1,003	376	627	2,659	110,711	15
June					-	-	-	-								-	-	-
July					-	-	-	-								-	-	-
August					-	-	-	-								-	-	-
September					-	-	-	-								-	-	-
October					-	-	-	-								-	-	-
November					-	-	-	-								-	-	-
December					-	-	-	-								-	-	-
<b>YTD</b>	<b>4,167</b>	<b>7,158</b>	<b>450,881</b>	<b>60</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>299</b>	<b>-</b>	<b>44,505</b>	<b>6</b>	<b>4,466</b>	<b>1,974</b>	<b>2,492</b>	<b>7,158</b>	<b>495,387</b>	<b>66</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[1]	-	-	221.40	-	-	-	-	-	3	-	21,040.51	2.22	3	-	21,262	2	
May	1	(95.65)	30,980.11	5.44	-	-	-	-	1	-	35,095.08	8.55	2	(96)	66,075	14	
June					-	-	-	-									
July					-	-	-	-									
August					-	-	-	-									
September					-	-	-	-									
October					-	-	-	-									
November					-	-	-	-									
December					-	-	-	-									
<b>YTD</b>	<b>7</b>	<b>2,888</b>	<b>155,703</b>	<b>33</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>7</b>	<b>-</b>	<b>111,530</b>	<b>19</b>	<b>14</b>	<b>2,888</b>	<b>267,233</b>	<b>52</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.

[1] April expenses for Gas & Electric CAM participant(s) are for a March treated property

**Energy Savings Assistance Program Table 6 - Expenditures for Pilots and Studies**  
**SDG&E**  
**May 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)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	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	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
2017 Potential and Goals Study	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	0%
Rapid Feedback Research and Analysis	\$ 54,340	\$ 54,340	\$ 108,680	\$ 6,204	\$ 6,204	\$ 12,409	\$ 8,237	\$ 8,237	\$ 16,474	15%	15%	15%
<b>Total Studies</b>	\$ 54,340	\$ 54,340	\$ 108,680	\$ 6,204	\$ 6,204	\$ 12,409	\$ 8,237	\$ 8,237	\$ 16,474	15%	15%	15%

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

**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  
May 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	170

<b>7C - Households for My Energy/My Account Platform - YTD</b>		
<b>Opt-Out</b>	<b>Already Enrolled</b>	<b>Opt-In</b>
4,407	2,315	169



**Energy Savings Assistance Program Table 8 - Contractor Advanced Funding and Repayment**  
**SDG&E**  
**May 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	\$ -			\$ 420,113	\$ 110,655	\$ -	\$ 7,647.01	\$ 534,930	
Apr-21	\$ -			\$ 97,454	\$ 38,982	\$ -	\$ 2,668.48	\$ 532,261	
May-21	\$ -			\$ 159,178	\$ 38,339	\$ -	\$ 1,000.00	\$ 531,261	
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>\$ 1,718,806</b>	<b>\$ 544,778</b>	<b>\$ -</b>	<b>\$ 637,780</b>	<b>\$ 531,261</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 Program Table 9 - Expenditures for Pilots/CHANGES Program<sup>1</sup>**  
**SDG&E**  
**May 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	\$ 16,345	\$ 99,943	75%
<b>Total</b>	<b>\$ 133,866</b>	<b>\$ 16,345</b>	<b>\$ 99,943</b>	<b>75%</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 Reporting Period April 2021[1]</b>	
<b>No. of attendees at education sessions</b>	<b>280</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	1
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>1</b>

<b>Needs Assistance</b>	
Add/Remove Level Pay Plan	0
Arrearage Management Plan (AMP)	4
Assisted with CARE Re-Certification/Audit	0
Assisted with Changes to Account	2
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	1
Medical Baseline	0
Neighbor to Neighbor	5
Payment Extension	1
Payment Plan	1
Rate Plan Selection Assistance	1
REACH	0
Reported Safety Problem	0
Reported Scam	0
Set Up 3rd Party Notification	0
Set Up New Account	1
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: Albanian, English, Farsi, French, Spanish, Vietnamese

[1] There is a one-month lag behind the current reporting month. The data for May 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 July 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**

**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		Avoiding Disconnection	0	N/A	0	CHANGES Ed Handout
N/A		CARE/FERA and Other Assistance Programs	0	N/A	0	CHANGES Ed Handout
N/A		Electric and Natural Gas Safety	0	N/A	0	CHANGES Ed Handout
N/A		Energy Conservation	0	N/A	0	CHANGES Ed Handout
N/A		Gas Aggregation	0	N/A	0	CHANGES Ed Handout
N/A		High Energy Use	0	N/A	0	CHANGES Ed Handout
N/A		Level Pay Plan	0	N/A	0	CHANGES Ed Handout
N/A		Understanding Your Bill	0	N/A	0	CHANGES Ed Handout
Current Month			0		0	
Year-to-Date			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.