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

AMENDED ANNUAL REPORT ACTIVITY OF SAN DIEGO GAS & ELECTRIC COMPANY (U 902 M) ON LOW INCOME ASSISTANCE PROGRAMS FOR 2020

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

July 26, 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

AMENDED ANNUAL REPORT ACTIVITY OF SAN DIEGO GAS & ELECTRIC COMPANY (U 902 M) ON LOW INCOME ASSISTANCE PROGRAMS FOR 2020

Pursuant to California Public Utilities Commission Rules of Practice and Procedures, Rule 1.12, San Diego Gas & Electric Company (SDG&E) hereby submits its Amended Annual Report Activity of SDG&E (U 902 M) on Low Income Assistance Programs for 2020 (Amended Report). The Amended Report presents the results and expenditures for SDG&E's California Alternate Rates for Energy (CARE) Program and Energy Savings Assistance (ESA) Program for program year 2020. The purpose of this Amended Report is to consolidate activity for the CARE and ESA Programs, and provide the California Public Utilities Commission's Energy Division with necessary information in analyzing the low-income programs.

SDG&E provides this Amended Report to:

- Correct the ESA disability enrollment goal achieved from 2% to 8.4%, due to a derivation error in which SDG&E used total leads rather than total enrollments as the denominator.[1]
- Correct the Normalized Metered Energy Consumption (NMEC) analysis data on multifamily properties treated through the ESA Common Area Measure initiative

[1] Amended Report at 29.

in Section 1.15.3, which was subsequently revised by a consultant to reflect annualized results.[2]

- Correct the Contractor Type classifications of two contractors on ESA Table 5, which were inadvertently marked as Women Minority Disabled Veterans Business Enterprises (WMDVBE).[3]

The Amended Report and reporting table revisions are shown in redline.

Respectfully Submitted,
On behalf of San Diego Gas & Electric Company

By: *\/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
E-Mail: rhansson@sdge.com

July 26, 2021

[2] Amended Report at 54.
[3] Amended Report at Appendix H, ESA Table 5.

REDLINE

SAN DIEGO GAS & ELECTRIC COMPANY

AMENDED ANNUAL REPORT ACTIVITY ON LOW INCOME ASSISTANCE PROGRAMS

2020 RESULTS

AMENDED LOW INCOME ASSISTANCE PROGRAMS ANNUAL REPORT

TABLE OF CONTENTS

2020 LOW INCOME ANNUAL REPORT EXECUTIVE SUMMARY 1

1. ENERGY SAVINGS ASSISTANCE PROGRAM EXECUTIVE SUMMARY 5

1.1 Alignment of Energy Savings Assistance Program with Strategic Plan Goals and Strategy. 11

1.2 Energy Savings Assistance Program Overview 16

1.3 Marketing, Education, and Outreach 17

1.4 Energy Savings Assistance Program Customer Enrollment 23

1.5 Disability Enrollment Efforts 25

1.6 Leveraging Success, Including LIHEAP 30

1.7 Integration Success 33

1.8 Workforce Education & Training 37

1.9 Legislative Lighting Requirements Status 39

1.10 Studies 39

1.11 Pilots 43

1.12 "Add Back" Measures 46

1.13 Low Income Working Groups 47

1.14 Annual Public ESA Program and CARE Meeting 48

1.15 Multifamily Properties 48

2. CARE EXECUTIVE SUMMARY 55

2.1 Participant Information 61

2.2 CARE Program Summary 66

2.3 CARE Program Costs 67

2.4 Outreach 71

2.5 Processing CARE Applications 86

2.6 Program Management 88

2.7 Pilots 89

2.8 Studies 89

2.9 CARE Restructuring Working Group 89

2.10 Miscellaneous: Describe coordination efforts with the California Advanced Services Fund's new Broadband Public Housing Account. 89

3. CARE EXPANSION PROGRAM 90

3.1 Participant Information 90

3.2 Usage Information 90

3.3 Program Cost 91

3.4 Outreach 91

3.5 Program Management 93

4. FUND SHIFTING 94

4.1 Report Energy Savings Assistance Program fund shifting activity that falls within rules laid out in Section 20.1 of D. 08-11-031 as modified by D.10-10-008, 16-11-022, and D.17-12-009. 94

5. COMMONLY USED ACRONYMS 95

Appendix A - CARE TV Examples

Appendix B - ESA Email and Direct Mail Example

Appendix C - CARE & ESA Print

Appendix D - 2020 CARE Email Example

Appendix E - 2020 CARE Direct Mail Example

Appendix F - 2020 CARE Outdoor Example

Appendix G - 2020 CARE Radio Example

Appendix H - ESA and CARE Program Tables

2020 LOW INCOME ANNUAL REPORT EXECUTIVE SUMMARY

In 2020, San Diego Gas & Electric Company's (SDG&E) Low-Income Programs were a critical tool in facing and overcoming the challenges of the global COVID-19 pandemic. Starting with the unexpected stay-at-home orders, which began in March 2020, SDG&E was able to maintain and prioritize the health and safety of employees, contractors, and customers by adjusting Energy Savings Assistance (ESA) Program operations, increasing awareness and visibility of all programs designed to provide customer assistance through expanded marketing and outreach, and implementing various COVID-19 Emergency Customer Protections to ensure customers were not removed from receiving the California Alternate Rates for Energy (CARE) or Family Electric Rate Assistance (FERA) program discount.[1] By year-end, the CARE Program reached a 112% penetration rate, which is the highest penetration rate in program history, and provided much needed financial relief for income-qualified customers, who suffered unemployment and other financial losses as a result of the COVID-19 pandemic. However, the COVID-19 pandemic had a severe impact on ESA Program operations, which rely heavily on in-person and in-home interaction. In response to Governor Newsom's stay-at-home order, SDG&E temporarily suspended ESA Program operations between March 20, 2020, and May 30, 2020. Once the suspension was lifted, program participation remained low due to customer hesitancy and decreased customer acceptance of in-home services. To ensure ESA Program workforce stability, SDG&E provided monetary advances to ESA Program contractors and offered post-pandemic return to service (PPRS) credits to reduce advance payments balances for those who accepted.[2] As a result, SDG&E was unable to meet the short-term annual 2020

[1] SDG&E Advice Letter 3516-E-D/2854-G-D for COVID-19 customer protections.
[2] Resolution E-5074 issued May 28, 2020.

program homes-treated goal but reiterates that, as previously reported, SDG&E was able to achieve the long-term 2020 programmatic first-time touch initiative in 2019.[3]

Program year 2020 was the second full year of the ESA Multifamily Common Area Measures (ESA CAM) initiative implementation. The ESA CAM initiative developed a case study, which clearly demonstrated the potential benefits of the program for both property owners and tenants. This case study was used to more effectively market the ESA CAM initiative and generate more leads. In addition, SDG&E's Multifamily Single Point of Contact (MF SPOC) held a virtual roundtable, in collaboration with the San Diego Housing Federation, in August 2020. The roundtable convened association members and program implementers for discussion and education on a variety of Energy Efficiency programs, including ESA in-unit and common area initiatives. As a result, SDG&E's ESA CAM program demonstrated tremendous growth in 2020 with 51 audits conducted and 57 multifamily projects treated. In comparison, SDG&E conducted 22 audits and treated nine multifamily projects in 2019.

With the onset of financial challenges for many customers related to the COVID-19 pandemic, SDG&E's customer assistance marketing campaign took on greater importance, and sought to connect with low income customers across a diverse population, including hard-to-reach customers, seniors, customers with special needs, and multilingual/multicultural customers. The campaign drove eligible customers to apply for CARE, and through SDG&E's internal coordination efforts, CARE enrollments were automatically converted into ESA Program leads. In 2020, the Customer Assistance Programs campaign included print, streaming TV, digital media, bill inserts, ethnic marketing, email, and direct mail. This was in addition to Live Call and outreach through SDG&E's Energy Solutions Partner Network and all of the

[3] Reflected in SDG&E's Low Income Annual Report of 2019 Activities at pages 4 and 8.

CARE capitation agencies that help enroll customers in the CARE Program. Additional tactics and spend were also added to the campaign to increase awareness of all of SDG&E's customer assistance programs, including direct mentions of the availability of bill relief from the California Department of Community Services and Development's (CSD)'s Low Income Home Energy Assistance Program (LIHEAP). An additional month of paid media was added during the month of May that adjusted messaging to refer customers to LIHEAP assistance via SDG&E's partnership with 2-1-1 San Diego. This new television spot was rotated in the media buy throughout the year. Finally, a new digital billboard on one of the main freeway arteries in San Diego promoted both CARE and LIHEAP.

SDG&E found great value in leveraging outreach relationships with partners such as CSD and 2-1-1 San Diego. These partnerships demonstrated SDG&E's commitment to utilizing every feasible effort to reach out to customers in need. SDG&E included phone numbers for LIHEAP on SDG&E's CARE applications and program materials so customers could have direct contact information to access services. SDG&E's CARE staff also informed customers about services offered by CSD and referred customers to CSD for additional bill assistance through LIHEAP. Further, SDG&E's agreement with 2-1-1 San Diego included a directive for referral to LIHEAP agencies Campesinos Unidos, Inc. (CUI) and Metropolitan Area Advisory Committee (MAAC), as appropriate. In 2020, 2-1-1 San Diego handled approximately 72,000 utility-related calls and referred approximately 17,300 of those to the aforementioned LIHEAP agencies.

The Expanded CARE Program[4] successfully served approximately 650 facilities and over 8,000 customers in 2020 with a bill discount. The Expanded CARE Program utilized targeted

[4] The Expanded CARE Program is applicable to non-profit, group-living facilities and agricultural employee housing facilities. See Section 3, below.

and coordinated outreach via SDG&E's skilled and knowledgeable customer team, including assigned account executives, customer contact center representatives, and outreach advisors. These employees worked directly with facilities that may be eligible for Expanded CARE and with Community Based Organizations (CBOs) who work directly with customers who may be eligible.

During 2020, in accordance with applicable fund shifting rules, SDG&E shifted a total of $232,900 CARE funds from the Information Technology (IT) Programming category to cover budget overages in the Processing, Certification and Recertification, Regulatory Compliance, and California Public Utilities Commission (CPUC or Commission) Energy Division categories.[5] There was no ESA Program or CARE Program fund shifting activity that occurred outside of the fund shifting rules.

[5] *See* Decision (D.) 08-11-031, as modified by D.10-10-008, D.16-11-022, and D.17-12-009 at pp. 164-166.

ENERGY SAVINGS ASSISTANCE PROGRAM ANNUAL REPORT

1. ENERGY SAVINGS ASSISTANCE PROGRAM EXECUTIVE SUMMARY

Summary of 2020 Results

SDG&E's ESA Program offers low-income natural gas and electric customers weatherization services, energy efficient lighting, energy efficient appliances, energy education, and other services at no cost. This report provides information on SDG&E's ESA Program accomplishments and expenditures for program year 2020.

As reported in SDG&E's 2019 Low Income Annual Report, SDG&E has already achieved what it refers to as the Commission's 2020 Initiative—the long-term policy objective to provide all eligible low-income gas and electric customers an opportunity to participate in the ESA Program by 2020.[6]

For the short-term annual 2020 goal, the Commission's Energy Division authorized an annual treatment goal of 23,761 homes consisting of 243 first touches and 23,518 retreatments.[7] The ESA Program was significantly impacted by the COVID-19 pandemic and the resulting public health and safety concerns, which halted the program between March 20 and May 30, slowed down program contractors and contributed to participation hesitancy. Thus, at the end of 2020, SDG&E treated 11,679 homes comprised of 5,308 first touches and 6,371 retreatments, or 49% of the 2020 annual treatment goal. As a result, program spending and savings also fell short with $13,528,673 or 44% of the authorized 2020 budget spent, plus $1,711,739 from 2009-2016 unspent funds totaling $15,240,412. Of the anticipated ESA Program energy savings, excluding

[6] The ESA Program 2020 Initiative is "to provide all eligible LIEE customers the opportunity to participate in LIEE programs and to offer those who wish to participate all cost-effective energy efficiency measures in their residences by 2020." (D.07-12-051 at 2.)

[7] Authorized in the Disposition Letter from the Energy Division of SDG&E's AL 3250-E/2688-G for the Mid-Cycle update.

the ESA CAM initiative, SDG&E achieved 17% kWh savings, 10% therm savings, and 4% demand savings. The lower savings values for ESA are the result of fewer homes/properties treated overall and lower energy savings values attributable to measures installed.[8]

Per Advice Letter 3196-E/2654-G, SDG&E had a target of treating 100 properties with the ESA CAM initiative by the end of 2020. In coordination with the MF SPOC, SDG&E improved success in the second full year of ESA CAM implementation by treating eleven times more homes than in 2019. In program year 2020, SDG&E's ESA CAM initiative treated 57 properties and completed 51 energy assessments/audits, benefiting 4,736 MF units. Since the implementation of the ESA CAM initiative, SDG&E has completed overall treatment of 62 properties, or 62% of the cycle goal. In addition, SDG&E's MF CAM initiative achieved 66% kWh savings, 10% therm savings, and 31% demand savings. SDG&E will continue to target and treat MF CAM properties in 2021 until the authorized funds are exhausted.

At year end, there was a total of $20,268,740 in unspent 2020 gas and electric ESA Program funds which represents $9,899,005 unspent gas funds and $10,369,735 unspent electric funds. These 2020 unspent funds represent authorized 2020 budget minus 2020 expenditures and do not reflect collections in SDG&E gas and electric balancing accounts. SDG&E's collections in its ESA Program balancing accounts at 2020 year-end totaled $37,740,513 in unspent electric and gas funds. This total is a combination of 2009-2016 unspent funds, plus 2017-2020 unspent funds, which represents $16,338,488 in unspent gas funds and $21,402,025 in unspent electric funds. Of these unspent funds, Resolution E-4884 authorized $12,959,793 to be utilized for specific new initiatives above and beyond the base ESA Programs.[9]

---

[8] Savings estimates are sourced from the PY2015 to 2017 ESA Impact Evaluation which is lower overall from the previous 2013 impact evaluation; the Energy Division instructed the IOUs to use these results for 2019 and 2020 savings estimates.
[9] Resolution E-4884 (December 14, 2017) at 1.

In D.16-11-022, as modified by D.17-12-009, the Commission directs the Investor-Owned Utilities (IOUs) to use unspent ESA Program funds to achieve program and policy objectives and to offset future revenue collections.[10] Consistent with this directive, beginning in January 2020, SDG&E partially offset its electric revenue collections in the amount of $2 million[11] and gas revenue collections in the amount of $2 million[12] using unspent ESA Program electric and gas funds. Therefore, the total remaining unspent funds available in the electric and gas collections is $24,780,721 as outlined in ESA Table 12 in Appendix H.

Procedural Background

In recognition of the changes in the energy markets and the environment, as well as the needs of low income customers and the larger community, the Commission updated its policy objectives for the ESA Program in D.07-12-051, stating:

> [T]he key policy objective for LIEE programs, like that of our non-LIEE energy efficiency programs, is to provide cost-effective energy savings that serve as an energy resource and to promote environmental benefits. Concurrently, we retain our commitment to ensuring the LIEE programs add to the participant's quality of life, which implicates equity, energy affordability, bill savings and safety and comfort for those customers who participate in LIEE programs.[13]

To achieve these objectives, the Commission adopted an ESA Program initiative "to provide all eligible LIEE customers the opportunity to participate in LIEE programs and to offer those who wish to participate, all cost-effective energy efficiency measures in their residences by

---

[10] D.16-11-022 at Sec. 5.1.6 ("All current unspent funds shall be utilized to fund program and policy objectives adopted in this decision, and to offset the program collections that would otherwise have been required.")
[11] *See* SDG&E Advice Letter 3440-E, approved January 13, 2020 and effective January 1, 2020 which requested the electric revenue requirement.
[12] *See* SDG&E Advice Letter 2815-G, approved January 2, 2020 and effective January 1, 2020 which requested the gas revenue requirement.
[13] D.07-12-051 at 25.

2020."[14] As previously discussed, SDG&E achieved the first goal at the end of 2019, one full year ahead of schedule.

On November 21, 2016, the Commission issued D.16-11-022 to approve SDG&E's Low-Income Application (A.) 14-11-009 and set forth the parameters for the administration and participation in the ESA and CARE Programs for years 2017 through 2020. The Commission extended "the authorization for these programs from 2017 until December 31, 2020 in light of the multiple delays resulting in bridge funding Decisions in this case, the significant program changes adopted herein, and the changes in electric rate structure in 2019 as default Time of Use rates are implemented."[15]

On March 24, 2017, the IOUs filed a Joint Petition for Modification (PFM) of D.16-11-022 requesting changes, corrections, and clarifications to the decision. Additionally, on April 24, 2017, California Housing Partnership Corporation, the Natural Resources Defense Council, and the National Consumer Law Center filed a joint PFM recommending modifications to D.16-11-022. The Commission issued D.17-12-009 resolving both PFMs of D.16-11-022 for the ESA and CARE Programs through program years 2017 through 2020.

On March 17, 2020, the Commission's Executive Director sent a letter to the California energy, water, and communications corporations stating the Commission's expectation that they would "extend the same applicable consumer protections directed in D.19-07-015" to utility customers retroactive to March 4, 2020.[16]

---

[14] *Id.* at 28.
[15] D.16-11-022 at 6-7.
[16] March 17, 2020 Letter from Alice Stebbins Re: Emergency Customer Protections to Support Customers Affected by the COVID-19 State of Emergency.

On March 19, 2020, to protect public health, all individuals living in the State of California were ordered by Governor Gavin Newsom to stay at home or at their place of residence to slow the spread of COVID-19. In response, SDG&E immediately halted most in-person ESA Program activities, while allowing for critical activities, such as furnace and water heating repairs and replacements, to continue.

On March 23, 2020, the Executive Director of the Commission sent a letter requesting all IOUs offer a 30-day advance payment to ESA "prime contractors" to help ensure the economic stability of the ESA Program's workforce.[17] On April 7, 2020, the Executive Director of the Commission sent a second letter to the IOUs clarifying guidance with respect to the direction provided in the March 23, 2020 letter, and requesting that all four large IOUs offer a second 30-day advance payment (total of 60 days) to ESA prime contractors.[18]

On April 16, 2020, the Commission adopted Resolution M-4842 to ratify the directions provided in the Commission's Executive Director's March 17, 2020 letter. Resolution M-4842 orders electric, gas, communications, and water and sewer corporations in California to 1) implement the applicable customer protections described in D.19-07-015 (or justify why the protections are not applicable to a pandemic emergency), and 2) file a Tier 2 Advice Letter describing all reasonable and necessary actions to implement emergency customer protections to support California customers. Resolution M-4842 further authorizes the electric, gas, communications, and water and sewer corporations to establish COVID-19 Pandemic Protections Memorandum Accounts (CPPMAs) to track incremental costs associated with complying with the Resolution. Resolution M-4842 highlights the unique impacts associated

[17] March 23, 2020 Letter from Alice Stebbins Re: Assurances to Energy Savings Assistance (ESA) contractors during the COVID 19 pandemic.
[18] April 7, 2020 Letter from Alice Stebbins Re: Follow up Assurances to Energy Savings Assistance (ESA) Contractors During the COVID 19 pandemic.

with the COVID-19 pandemic and mandates that SDG&E offer specific emergency customer protections, where applicable, for "residential and small business customers for up to one year from the date of this Resolution, with the option to extend."[19]

In response to Resolution M-4842, SDG&E submitted Advice Letter 3516-E-D/2854-G-D, which detailed various protections for customers impacted by the COVID-19 pandemic. Among other things, this Advice Letter included protections for CARE and FERA customers to avoid unintended loss of any bill discount during the COVID-19 pandemic. On March 19, 2020, the Commission approved SDG&E Advice Letter 3516-E-D/2854-G-D directing SDG&E to provide COVID-19 Emergency Customer Protections, effective March 4, 2020, through April 16, 2021.[20] The COVID-19 Emergency Customer Protections were subsequently extended to June 30, 2021, pursuant to Resolution M-4849 issued by the Commission on February 12, 2021.

On May 28, 2020, the Commission adopted Resolution E-5074, which ratified elements of the March 23, 2020, and the April 7, 2020 letters sent by the Executive Director of the Commission. Specifically, based on the unique workforce considerations of the ESA Program in light of the COVID-19 pandemic, the Resolution: 1) ratified the 60-day advance payment to ESA prime contractors; 2) approved, with modification, a pay-for-performance mechanism for repayment known as Post-Pandemic Return to Service credit; 3) approved expedited IOU invoice payments; and 4) required all IOUs (including Small and Multi-Jurisdictional Utilities (SMJU)) to offer the advance payment to their ESA prime contractors. The Resolution denied transforming the advance into a forgivable loan and denied the advance payment covering inventory/appliance supplier costs. The Resolution also clarified the calculation for advance

[19] SDG&E Advice Letter 3516-E-D/2854-G-D at 3 (citing Resolution M-4842 at 4-6 [listing 12 specific mandated actions] and Ordering Paragraph (OP) 5).
[20] Subsequently, the Commission extended the customer protections to June 30, 2021 in Resolution M-4849 issued on February 11, 2021.

payments, what overhead costs the advance payment should cover, payback periods and contract extensions, reporting and tracking requirements for the advance, and how IOUs and contractors should handle duplicate financial assistance.

1.1 Alignment of Energy Savings Assistance Program with Strategic Plan Goals and Strategy.

The long-term 2020 Initiative (also known as the Strategic Plan) for the ESA Program calls for 100% of all eligible and willing low-income customers to receive all cost-effective ESA Program measures by 2020. The cumulative 2018 through 2020 goal was 16,540 homes.[21] As demonstrated in the table below, SDG&E achieved that goal in 2019. In 2020, SDG&E outreached to both previously treated homes and continued to serve premises and customers receiving treatment for the first time – including those newly eligible as a result of the COVID-19 pandemic.

2018 - 2020 Household First Touch Treatment Goals

	2018	2019	2020	Total
Authorized	11,667	4,630	243	16,540
Actual	7,785	10,072	5,308	23,165

In addition to the 2020 Initiative ("first touch") goals established by the Commission, D.16-11-022 set annual targets, including both first touches and retreatments for the IOUs. These annual targets were later modified by the mid-cycle advice letter.[22] As previously discussed, the annual ESA treatment goal for program year 2020 was to serve 23,761 customers. Due to the

[21] *See* SDG&E Advice Letter 3250-E/2688-G, approved and effective December 27, 2018 which, among other things, increased the homes treated goal for 2019 and 2020 adding 243 homes per year.
[22] SDG&E Advice Letter 3250-E/2688-G.

COVID-19 pandemic, however, 2020 proved to be a challenging year for contractors to reach established program goals. As a result, SDG&E treated 11,679 homes by 2020 year-end.

Moreover, D.17-12-009 also authorized changes to the ESA Program design to allow more flexibility to accomplish ESA Program statutory goals and "reduce hardship on low-income Californians in a cost-effective manner."[23] The changes included energy savings targets, the elimination of the three-measure minimum (3MM) rule, the elimination of the go-back rule, removal of measure caps, authorization to leverage CSD multifamily in-unit with ESA Program funds, and authorization to treat common areas of eligible deed-restricted multifamily properties.[24]

1.1.1 Please identify the IOU strategies employed in meeting Goal 1: Improve Customer Outreach.

SDG&E uses various strategies to target and market to customers and improve customer outreach efforts. In addition to using customer analytics, SDG&E has built a large network of partnering agencies that provide customers with valuable information regarding the ESA Program. Additionally, SDG&E partnered with the IOUs to streamline In-Home Energy Education and training materials for the program to provide consistent program messaging to customers throughout the state of California.

In the table immediately below, SDG&E provides the activity for 2020 reflecting the long-term strategy implementation plan and timeline.[25]

---

[23] D.17-12-009, Attachment 1 at 6.
[24] *Id.*
[25] The California Long-Term Energy Efficiency Strategic Plan (Strategic Plan) updated January 2011.

Implementation Plan and Timeline		
Strategies	**Term 2017-2020**	**IOU strategy employed this program year**
1:1 Strengthen program outreach using segmentation analysis and social marketing tools.	• Continue to assess and evaluate customer behavior and energy savings; improve upon outreach to eligible communities.	• Used a coordinated and integrated mix of general awareness channels, targeted campaigns, and collaborative partnerships. • Promoted ESA as the secondary or next best offer to qualifying CARE customers.
1.2: Develop a recognizable and trustworthy Brand/Tagline for the programs.	• Evaluate progress/refine strategy.	• The IOUs built on the established ESA brand and collaborated on a statewide energy education booklet to continue to drive statewide program recognition. The statewide approach ensures that a consistent message is being provided to all ESA customers across the state.
1.3: Improve program delivery.	• Ongoing: Use information from segmentation analysis to achieve efficiencies in program delivery.	• SDG&E used the most current Athens Research data in conjunction with SDG&E's recent residential segmentation data to identify high opportunity areas to target for outreach efforts. SDG&E also identified high population density of targeted audiences (i.e., seniors) by zip code and targeted customers within these opportunity areas (in particular, the hard to reach customers) through community-based outreach activities. Due to the impacts of the COVID-19 pandemic, SDG&E adjusted enrollment strategies to include enrollment and delivery of In-Home Energy Education over the phone, and postponed in-home visits to a time when customers

Implementation Plan and Timeline		
Strategies	**Term 2017-2020**	**IOU strategy employed this program year**
		would be more comfortable with contractor in-person visits.
	• Ongoing: Leverage with Local, State, and Federal agencies as well as other organizations to increase seamless coordination, efficiency, and enrollment.	• SDG&E continued to partner with local LIHEAP agencies to leverage enrollment opportunities for the ESA Program. Both local San Diego LIHEAP agencies partner with SDG&E as ESA contractors and leverage enrollment opportunities whenever possible. SDG&E also partners with 2-1-1 San Diego to offer ESA Program services when a client is calling to receive support from Local or Federal programs.
1.4: Promote the growth of a trained ESA Program workforce.	• Implement ESA Program workforce education and training.	• The utilities targeted the implementation of coordinated statewide online training platforms for 2020. However, due to utility specific training needs, one statewide platform was not agreed upon. Due to the COVID-19 pandemic, SoCalGas quickly transitioned to an online platform. In 2020, SoCalGas shared their efforts and SDG&E will be leveraging similar platforms and plan to complete in mid-2021.
	• Coordinate ESA Program workforce and service providers with broader market.	• SDG&E workforce education and training is available to all ESA Program contractors and contractors, who are emailed information on training opportunities. Due to the COVID-19 pandemic, ESA Program specific training was not conducted.

1.1.2 Please identify the IOU strategies employed in meeting Goal 2: Energy Savings Assistance Program as an Energy Resource.

SDG&E has leveraged opportunities, both internally and externally, to improve program participation to achieve strategic program goals. Through partnerships with local water and state agencies, leveraging internal programs, and the utilization of data analytics, SDG&E maximized opportunities to offer the ESA Program to customers. In the table immediately below, SDG&E provides the activity for 2020, reflecting the long-term strategy implementation plan and timeline.

Implementation Plan and Timeline		
Strategies	**Term 2017 – 2020**	**IOU strategy employed this program year**
2.1: Increase collaboration and leveraging of other low income programs and services.	• Continue to expand partnerships with stakeholders and seek new opportunities for data sharing.	• SDG&E continued to partner with local LIHEAP agencies to leverage enrollment opportunities for the ESA Program. In addition, SDG&E continued to partner with San Diego County Water Authority (SDCWA) to leverage processes for customers receiving water savings measures as part of the ESA Program. Additional information can be found in Section 1.6.4.
2.2: Coordinate and communicate between ESA Program, energy efficiency, and Demand Side Management (DSM) Programs to achieve service offerings that are seamless for the customer.	• Continually reevaluate and update programs to take advantage of new technologies.	• In 2020, SDG&E began the implementation of Heat Pump Water Heaters (HPWH), providing training to all contractors and internal employees on identifying opportunities for installation of the new measure. HPWH allow customers to heat water at optimal times, reducing usage during peak periods. Additionally, SDG&E continues to install smart thermostats which allow customers to take advantage of DSM programs. As part of ESA Program energy education, customers are

Implementation Plan and Timeline		
Strategies	**Term 2017 – 2020**	**IOU strategy employed this program year**
		made aware of additional programs and services they can take advantage of through SDG&E.
2.3: Provide low income customers with measures that result in the most savings in the ESA Program.	• Continue to evaluate. Assess opportunities to incorporate new energy efficiency measures into the ESA Program, e.g., plug-load reduction, new HVAC technology.	• As part of program delivery beyond 2020, SDG&E continued to evaluate opportunities by working with SDG&E energy efficiency engineers, Emerging Technologies staff, and other utilities to identify opportunities to provide customers with greater energy savings.
2.4: Increase delivery of efficiency programs by identifying segmented concentrations of customers.	• Continue to evaluate approach and determine whether additional segments are needed.	• SDG&E continued to use residential segmentation data overlaid with the Athens Research Study to effectively identify customers and manage the program. See Section 1.3 for detailed market segmentation information.

1.2 Energy Savings Assistance Program OverviewProvide a summary of the Energy Savings Assistance Program elements as approved in D.16-11-022 and D. 17-12-009.

Program Summary[26]			
	2020 Authorized Budget / Planning Assumptions	**2020 Actual**	**%**
Budget[27]	$ 35,509,153	$ 15,240,412	43%
Homes Treated	23,761	11,679	49%
MF CAM Properties Treated	45	57	127%
kWh Saved	8,404,499	1,994,251	24%

[26] Program Summary table combines the budgets and savings for both the ESA Program and ESA CAM initiative.

[27] *See* SDG&E Advice Letter 3250-E/2688-G, approved and effective on December 27, 2018 which updates 2020 authorized budgets (base budget plus unspent funds), homes treated, and energy savings.

Program Summary[26]			
	2020 Authorized Budget / Planning Assumptions	**2020 Actual**	**%**
kW Demand Reduced	4,450	315	7%
Therms Saved	475,129	45,957	10%
GHG Emissions Reduced (Tons)	7,402	1,366	18%

1.3 Marketing, Education, and Outreach Provide a summary of the geographic segmentation strategy employed, (i.e., tools and analysis used to segment "neighborhoods," how neighborhoods are segmented and how this information is communicated to the contractor/CBO).

SDG&E understands the importance of customer segmentation, as it enables SDG&E to identify hard-to-reach customers and gain insights into barriers and solutions. When organizing SDG&E's residential population into detailed profiles of individual segments, there are several ways to describe them by energy-related attitudes and behaviors, including demographics, energy conservation behaviors, media consumption habits, lifestyle preferences, mobile usage, propensity to engage, and more.

SDG&E used a variety of factors to identify customers more likely to qualify for the ESA Program, which included the most current Athens Research Study and SDG&E's Residential Segmentation model. The purpose of this model was to modernize SDG&E's residential customer segments to account for market changes and ever-changing customer dynamics. This segmentation allowed for targeted messaging to customers with high potential for eligibility. Likewise, the utilization of customer preferred channels of communication enabled SDG&E to drive customer enrollment. As discussed in further detail herein, a series of communication tactics such as direct mail, and outbound calling, were deployed to potentially eligible customers within specific neighborhoods.

An example of SDG&E's multi-touch integrated approach is the 2020 ESA Program targeted marketing campaign in which SDG&E sent 301,478 emails and/or direct mail postcards to currently enrolled and potentially eligible CARE customers, encouraging them to also save through the ESA Program. Following the email and/or postcard, SDG&E provided a canvassing list to ESA Program outreach contractors, providing ESA Program penetration rates and PRIZM code information for each zip code. PRIZM codes are third-party generated customer segments based on socioeconomic data. See Appendices A – G for samples of this campaign.

SDG&E continued collaboration with the Energy Solutions Partner Network, which helps educate and enroll customers in low-income programs utilizing a variety of 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. SDG&E strategically identifies CBOs in areas and various pockets within low-income populations throughout its service territory. These areas include harder-to-reach rural, multi-cultural, multi-lingual, and access and functional needs communities.

In 2020, the Energy Solutions Partner Network leveraged both traditional messaging (e-mail, newsletters, direct mail) and social media platforms (Facebook, Twitter, Instagram) to effectively deliver SDG&E provided tailored messages to customers from organizations they are aligned with and trust. SDG&E also worked with these partners to provide education and engagement opportunities at approximately 230 presentations and events throughout its service territory. Many of the presentations and events throughout the year were held virtually due to the COVID-19 pandemic. At the events with multicultural/multilingual partners or communities, SDG&E secured bilingual representatives to communicate effectively with non-English speaking customers who often represent SDG&E's hardest-to-reach populations.

The ability for CBOs to penetrate these harder-to-reach customer segments continues to be valuable in securing enrollments. These partner organizations have established relationships and trust within their communities. SDG&E coordinated tactics with the CBOs to promote the CARE, Family Electric Rate Assistance (FERA), and ESA Programs to customers, which reduces the trust barrier and creates more enrollment opportunities. These tactics included presentations, events, trainings, and messaging to increase awareness and drive enrollments in the ESA Program. As part of the customer engagement outreach plan, SDG&E educated partners with training materials on the ESA Program, including how to utilize the CARE, FERA, and ESA Programs' online application to streamline the enrollment process for their organization.

1.3.2 Provide a summary of the customer segmentation strategies employed (i.e., tools and analysis used to identify customers based on energy usage, energy burden and energy insecurity) and how these customer segments are targeted in the Whole Neighborhood Approach to program outreach.

As previously discussed, SDG&E continued to utilize Residential Segmentation data overlaid with the Athens Research Study. Using this information, SDG&E has distinct segments among residential customers based on various factors such as:

- Perceived ability and willingness to take action to change energy consumption patterns and behaviors;
- Motivations for adopting new behaviors, including underlying values that drive decisions;
- Attitudes toward energy efficiency and environmental issues;
- Affinity for new technologies and energy management tools;
- Technology and communication tools used (internet, smart phones, etc.); and
- Limited or specialized communications needs and preferences.

SDG&E developed a new creative campaign in 2020, which focused on communicating ESA and CARE benefits to those who may have lost their job or had a financial hardship due to the COVID-19 pandemic. The campaign ran in English, Spanish, and Asian languages and included TV (general market and streaming), radio (streaming), outdoor, print, digital (including paid search), email, direct mail, and bill inserts. See Appendix A-G of this report for examples.

1.3.3 Describe how the current program delivery strategy differs from previous years, specifically relating to Identification, Outreach, Enrollment, Assessment, energy Audit/Measure Installation, and Inspections.

Outreach and Enrollment Strategies:

As detailed in the Executive Summary above, SDG&E suspended all non-critical, in-person program activity on March 20, 2020 in response to the COVID-19 pandemic. Statewide, the IOUs suspended program activities during similar timeframes. Further, in April 2020, as directed in Resolution E-5074, SDG&E adjusted ESA enrollment strategies to implement a virtual enrollment process for ESA contractors, which would continue to build a pipeline of eligible customers for the resumption of ESA in-person activities.[28]

SDG&E's two largest contractors piloted telephone enrollment efforts, focusing primarily on self-certification areas to minimize any data security issues around providing income documentation and gathering customer agreements via email confirmation. However, customers were not excluded from qualifying through full-income documentation. SDG&E supported these efforts by conducting email campaigns to generate leads for contractors to make follow-up calls. Contractors contacted customers to complete program enrollments, which were offered in English and Spanish. During the call, customers were advised that a subsequent visit would

[28] Resolution E-5074 at 25.

occur to conduct a home assessment and measure installation once full program operations resumed or when the customer was comfortable having contractors visit the home. Once program operations resumed, contractors continued to offer telephone enrollment options to customers who would prefer to delay in-person visits for a later date.

In-Home Education Strategies:

In support of virtual enrollment efforts, contractors also provided in-home education as part of the telephone enrollment process. Utilizing statewide program materials and IOU specific inserts, contractors were able to walk customers through the materials over the telephone. Consistent with telephone enrollment efforts, education was provided in English and Spanish. Education materials were also available in Chinese, Vietnamese, Hmong, Korean, and Russian.

Measure Installation/Inspections:

In 2020, SDG&E did not retire any measures. In late 2020, SDG&E implemented heat pump water heaters, providing training to all assessors, installers, and program personnel.

In 2020, to support COVID-19 restrictions and to ensure the safety of customers and employees, SDG&E transitioned to a primarily virtual inspection model for many non-mandatory inspections, where measure installation was verified through photos, when possible. SDG&E continued to conduct mandatory furnace and attic insulation inspections in-person, and additional in-person visits were conducted as needed. SDG&E conducted over 2,600 inspections in 2020.

1.3.4 Track Costs of AB 793 related Energy Management Technologies programs (identify all of the programs or initiatives that will be able to benefit from the availability of the end-use and electric usage profiles, and to coordinate with the relevant proceedings so that the

relevant costs can be considered in those proceedings' cost-effectiveness decision-making), including costs for Energy Education

AB 793, among other things, directs the IOUs to incorporate energy management technologies into the ESA Program measure offerings. The following ESA Program activities were conducted in 2020 related to energy management technologies and costs:

Energy Education

As part of In-Home Education, contractors are required to offer and walk customers through the My Account enrollment process. In 2020, contractors used the "Pricing Plans to Fit Your Lifestyle" leave behind, which replaced the previous material "Managing Your Energy Use and Save." The new material includes information on My Account features that help customers manage energy bills, including notifications and alerts. The piece also provides energy savings tips and detailed information on time of use (TOU) plans and other pricing plan choices for customers.

End-Use Load Profiles

In 2018, SDG&E conducted a competitive solicitation on behalf of the three electric IOUs and selected Ecotagious Inc.[29] to provide load disaggregation services for CARE customers. In 2019, the project team completed the first phase of the project, which consisted of analyzing electric usage for a sample of CARE customers. The work scope for phase two of the project, which spanned 2020, consisted of expanding the phase one analysis to all CARE customers in the three electric IOU service areas.

In May 2020, SDG&E provided aggregated results from the project to potential bidders in the 2021 Demand Response Auction Mechanism (DRAM) as required by D.17-12-009.[30] In

[29] In 2019, Ecotagious was acquired by Uplight, Inc.
[30] D.17-12-009, Attachment 1, OP 95 at 488.

July 2020, SDG&E received the first set of reports from the vendor in the form of PDF files, with the second set made available in September 2020. SDG&E began downloading the second set of reports but experienced technical challenges with downloading, housing, and distributing the reports. SDG&E is continuing to resolve these issues so the reports may be utilized by program contractors. In addition, SDG&E assessed options for making the load profile reports accessible to customers in its My Account platform; however, this was not possible due to a code freeze on the My Account system related to SDG&E's Customer Information System (CIS) replacement project. SDG&E intends to complete the requirements related to making the reports accessible to customers and contractors in 2021.

Load Disaggregation Services Contract Costs for 2020

Total Costs Incurred in 2020	PG&E Portion (43.7%)	SCE Portion (46%)	SDG&E Portion (10.3%)
$1,021,667	$446,468	$469,967	$105,232

1.4 Energy Savings Assistance Program Customer Enrollment

1.4.1 Distinguish between customers treated as "retreated or go backs" and "first touch" customers so that the Commission has a clear idea of how many new customers the IOUs are adding to the Energy Savings Assistance Program.

In 2020, SDG&E enrolled a total of 5,308 first touch customers and 6,371 retreatments. Details regarding homes treated can be found in ESA Table 2 in Appendix H of this report.

1.4.2 Please summarize new efforts to streamline customer enrollment strategies, including efforts to incorporate categorical eligibility and self-certification.

As outlined in Section 1.3.3, SDG&E implemented telephone enrollment strategies to encourage customer participation in the ESA Program and offered installation services at a later date when customers were more comfortable with in-home contractor visits. SDG&E continued

to use categorical eligibility and targeted self-certification enrollment strategies (based on PRIZM codes) to minimize income documentation needed for program enrollment. SDG&E enrolled approximately 700 customers through telephone enrollment efforts. Additionally, SDG&E continued leveraging efforts with CARE post-enrollment verification income documents, including CARE high energy users, to enroll ESA Program qualified customers, which can be leveraged for up to 12-months after the initial certification.

1.4.3 If the IOU has failed to meet its annual goal of number of households served, please provide an explanation of why the goal was not met. Explain the programmatic modifications that will be implemented in order to accomplish future annual goals of number of households served.

SDG&E did not meet the annual homes treatment goal for 2020. Due to the COVID-19 pandemic, SDG&E notified contractors of a program suspension in March 2020 and stopped all non-critical program activities, including face-to-face program enrollment. The program suspension was lifted May 29, 2020, when ESA contractors were notified that program activities may resume. The impact of the three-month program shut-down was difficult to overcome. Additionally, SDG&E's primary Outreach & Assessment contractor made door-to-door canvassing efforts optional for employees, allowing employees to resume door-to-door activities once they felt safe to do so, which meant that some employees may not have resumed door-to-door activities until some time later than May 29, 2020. In September 2020, SDG&E's largest contractor resumed mandatory door-to-door enrollment, and enrollments improved. ESA contractors faced additional challenges, including workforce impacts due to the COVID-19 pandemic, such as employees self-quarantining or employees out on medical leave.

SDG&E worked with contractors to implement solutions for virtual enrollments to build a pipeline of enrollments that could be treated once face-to-face activities resumed. Utilizing leads generated through marketing and outreach campaigns, contractors contacted customers by

telephone and enrolled them in the ESA Program. Contractors primarily targeted self-certification and categorically enrolled customers to help reduce the virtual sharing of income information, but also served customers providing full-income documentation and securely collected information when needed. While this effort was helpful in building a pipeline of customers, the enrollment volume generated was significantly lower than what is generated through door-to-door canvassing efforts. Towards the end of 2020, the resumption of SDG&E's primary Outreach & Assessment contractor's door-to-door canvassing efforts and improvement in employee recruitment efforts helped increase program enrollments and set the stage for successful efforts moving into 2021.

1.5 Disability Enrollment Efforts

1.5.1 Provide a summary of efforts to which the IOU is meeting the 15% penetration goal.

In 2020, SDG&E conducted outreach efforts with organizations serving disabled customers (listed below) to improve ESA Program engagement. Throughout the year, SDG&E partnered with these organizations in over 75 events and presentations reaching over 7,100 customers, most of whom were virtual or drive through food drives. These events and presentations took place to educate each organization's staff and volunteers, so they could help those in the community that utilize their services. Additional information about these community organizations and SDG&E's joint outreach efforts can be found in section 1.5.2 below. SDG&E partnered with the following organizations in an effort to better reach disabled customers:

- 2-1-1 San Diego
- 2-1-1 Orange County
- Access to Independence

- Alzheimer's Association
- American Red Cross WIC
- Center for the Blind Vista
- City of San Juan Capistrano Community Center
- City of San Marcos Senior Activity Center
- Cool Zones - County of San Diego
- County Health and Human Services Agency
- Cystic Fibrosis Foundation
- Deaf Community Services
- Elder Help
- Epilepsy Foundation of San Diego
- Fallbrook Senior Center
- Foundation for Senior Care
- Friends of the Fallbrook Community Center
- Hope Through Housing Foundation
- Horn of Africa
- Julian Cuyamaca Resource Center, Inc.
- La Jolla Community Center
- La Maestra
- Laguna Niguel Family YMCA
- Lawrence Family Jewish Services
- Meals on Wheels
- Neighborhood House Association
- North County Health Services

- Pacific Southwest Community Development Corporation
- Park Avenue Community Center
- Pastors on Point San Diego
- Resounding Joy
- San Diego Center for the Blind
- San Diego Housing Federation
- San Ysidro Health
- San Ysidro Health Center WIC
- Scripps Mercy WIC
- San Diego State University WIC
- St. Madeleine Sophie's Center
- The ARC of San Diego
- The Dayle McIntosh Center
- The Vision of Children
- TrueCare
- Union of Pan Asian Communities San Diego (UPAC)
- Valley Center CERT/ Valley Center ARC
- Vista Community Clinic
- Warner Springs Community Resource Center

1.5.2 Describe how the Energy Savings Assistance Program customer segmentation for ME&O and program delivery takes into account the needs of persons with disabilities.

SDG&E's marketing, education, and outreach (ME&O) activities are designed to specifically support the needs of customers with disabilities. SDG&E has worked diligently to partner with various CBOs, including non-profit organizations, community clinics, and

county/city agencies that provide direct services to this customer segment, providing education and engagement opportunities in support of the ESA Program. Partner segments with outreach activities include:

Hearing & Vision

I. San Diego Center for the Blind

San Diego Center for the Blind posted online messaging to their constituents regarding SDG&E's energy solutions and services that include Low Income and Medical Baseline programs in English and Spanish.

II. Deaf Community Services

On a monthly basis, Deaf Community Services shared marketing materials and messaging through their communication channels to promote programs that affect or benefit the deaf community in SDG&E's service territory.

Mental & Health & Services

Several Energy Solutions Partners offered services supporting mental health customers. Partners attended SDG&E virtual presentations on residential programs, SDG&E conducted specialized presentations and trainings to partners on CARE, FERA and ESA Programs, and monthly messages were posted on social media.

Senior Centers

Outreach Advisors conducted presentations to the Senior Centers throughout San Diego with information on SDG&E's programs. Partners attended SDG&E virtual presentations on residential programs and monthly messages were posted on social media.

1.5.3 Identify the various resources the IOUs utilize to target the disabled community and the enrollments as a result.

SDG&E's ME&O communications are designed to specifically address the communication needs of its customers with disabilities as detailed below.

For customers with visual impairments, SDG&E has provided large-font printed collateral materials and provides program information booklets in Braille, which include the most up-to-date energy saving tips and resources.

In addition, SDG&E has partnered with several CBO's serving customers with special needs to actively promote the ESA Program. The list of those organizations is in Section 1.5.1 above. These partners provide customized messaging through email, e-blasts, newsletters, social media posts such as Facebook, Twitter, and Instagram, as well as at events, workshops and trainings with each organization's staff. These efforts led to ~~2%~~ 8.4% of SDG&E's ESA Program enrollments identified as disabled customers for 2020.

1.5.4 If participation from the disabled community is below the 15% goal, provide an explanation why.

In 2020, SDG&E's disabled enrollment numbers totaled ~~2%~~ 8.4% of the goal. As detailed above, the COVID-19 pandemic created a barrier to reaching all eligible customers, including customers in the disabled community. Additionally, as in previous years, the challenge with reaching this goal is in part because of the limitation in how identification of a disabled customer takes place. Customers are not required to provide disability status and often customers are not comfortable doing so. Contractors are reliant on customers to provide disability status or visual indicators, which are not always apparent. With the reduction of in-home visits, it became more challenging to reach the disability goal.

As in previous years, SDG&E continued to partner with local organizations serving disabled customers, such as Deaf Community Services, 2-1-1 San Diego, and others to increase

enrollments within its service territory. To support future efforts, SDG&E will continue to partner with the National Braille Press to provide translation for the Statewide Energy Education booklet into Braille. Copies were made available to partnering agencies starting in 2019 and continued in 2020.

1.6 Leveraging Success, Including LIHEAP

Decision 08-11-031 defines leveraging as "an IOU's effort to coordinate its ESA Programs with programs outside the IOU that serve low income customers, including programs offered by the public, private, non-profit or for-profit, local, state, and federal government sectors that result in energy efficiency measure installations in low income households". Progress will be measured by tracking the following criteria:

- **Dollars saved**: Leveraging efforts are measurable and quantifiable in terms of dollars saved by the IOU (shared/contributed/donated resources, elimination of redundant processes, shared/contributed marketing materials, discounts, or reductions in the cost of installation, replacement, and repair of measures, are just some examples of cost savings to the IOU).

- **Energy savings/benefits**: Leveraging efforts are measurable and quantifiable in terms of home energy benefits/savings to the eligible households.

- **Enrollment increases:** Leveraging efforts are measurable and quantifiable in terms of program enrollment increases and/or customers served.

1.6.1 Describe the efforts taken to reach out and coordinate the Energy Savings Assistance Program with other related low-income programs offered outside the IOU that serve low income customers.

As previously mentioned, SDG&E's established Energy Solutions Partner Network consists of over 190 grassroots organizations throughout the community. Some of these partners include Women, Infant and Children (WIC) agencies, Catholic Charities, 2-1-1 San Diego, and many similar agencies. As part of the intake process, 2-1-1 San Diego enrolls eligible customers in CARE or FERA and also offers leads to the ESA Program. Approximately 1,600 leads and

175 customer enrollments were generated through SDG&E's ESA Program partnership efforts in 2020.

SDG&E has also coordinated leveraging efforts between the Solar on Multifamily Affordable Housing (SOMAH) Program and the ESA Program. SDG&E's MF SPOC attended SOMAH and IOU Working Group meetings in 2020 to establish a process for leveraging leads across both programs. The SOMAH Program discussions focused on the development of a template to be used by the SOMAH program team to report ESA referrals on a monthly basis to SDG&E's MF SPOC, as well as the template to be used by SDG&E for the Annual ESA Data Request to report the results of the ESA leads back to the SOMAH program team. SDG&E received 16 ESA leads from the SOMAH Program Administrator in 2020. The SOMAH Program Administrator has not requested leads from SDG&E as the program is reportedly fully subscribed in the SDG&E service territory during 2020.

As directed in D.17-12-009, SDG&E continued its Non-Disclosure Agreement with the Single-family Affordable Solar Homes (SASH) Program Administrator, currently GRID Alternatives, to provide lists of owner-occupied single-family households that have completed the ESA Program requirements of the CARE Program high usage process. Additional information regarding this effort is provided in Section 1.7.6 below.

1.6.2 In addition to tracking and reporting whether each leveraging effort meets the above criteria in order to measure the level of success, please describe the Other Benefits resulting from this particular partnership not captured under the 3 criteria described above.

SDG&E's robust network of local agency partnerships helped the utility promote programs and services offered quickly and efficiently to customers in need. Partnerships with organizations such as 2-1-1 San Diego also helped streamline the enrollment processes for the programs and increased the ability of customers to receive comprehensive services, from

payment assistance to ESA Program measure installation, providing for a simplified customer experience.

1.6.3 Please provide a status of the leveraging effort with CSD. What new steps or programs have been implemented for this program year? What was the result in terms of new enrollments?

SDG&E partners closely with local LIHEAP agencies to improve leveraging opportunities between CSD's LIHEAP and the ESA Program. SDG&E contracts with the two LIHEAP agencies in San Diego County to provide outreach and assessment services for the ESA Program. In 2020, the COVID-19 pandemic significantly impacted LIHEAP agency leveraging, as the State LIHEAP weatherization installation programs activities were suspended for longer than the ESA Program. As part of their outreach and enrollment efforts, these agencies can leverage LIHEAP payment assistance customers as leads for ESA Program treatment efforts. In 2020, LIHEAP contractors enrolled 1,022 customers in the ESA Program, of which 579 qualified for categorical enrollment due to participation in LIHEAP (See ESA Table 14 included in the Appendix H of this report). This continued effort reduced costs associated with outreach and verification by leveraging the LIHEAP income verification process, which occurs at the time the customer receives payment assistance.

SDG&E's Advice Letter 3250-E/2688-G included plans on coordination efforts with local LIHEAP agencies to support customers with non-IOU fuels with high-energy burdens. As part of the long-standing partnerships with local LIHEAP payment assistance agencies, SDG&E's plans included continued leveraging efforts with LIHEAP organizations to support non-IOU fuel customers by offering various payment assistance programs available and maximizing measures offered through the ESA Program and LIHEAP. This partnership also allows for the installation of measures to renters that may not be available through the ESA Program.

1.6.4 Describe the coordination efforts with water agencies or companies (wholesalers or retailers).

During the 2017-2020 program cycle, SDG&E and San Diego County Water Authority (SDCWA) began developing a plan to improve partnership efforts between the two organizations. The partnership between SDG&E and SDCWA is known as the Water Energy Partnership (WEN) and its purpose is to provide increased incentives (water and energy) through a simplified process by using one contractor to install measures for both. Additional benefits include streamlined communications and marketing efforts, increased installation of measures for larger savings, and improving the ability to use available funds to benefit the customer.

SDCWA and SDG&E entered into an agreement to implement a residential low-income water-energy collaboration. This effort allows SDCWA to augment ESA Program funding for certain measures that save both energy and water, thereby expanding the number of customers served and the amount of energy and water saved. SDG&E and SDCWA leverage outreach opportunities to raise awareness of their respective programs. SDCWA promoted the ESA Program as part of its customer education efforts, while SDG&E included SDCWA water saving educational materials as part of the in-home education process under the ESA Program. In 2020, SDG&E leveraged over $154,665 with SDCWA.

1.7 Integration Success

Per D.08-11-031:

"Integration constitutes an organization's internal efforts among its various departments and programs to identify, develop, and enact cooperative relationships that increase the effectiveness of customer demand side management programs and resources. Integration should result in more economic efficiency and energy savings than would have occurred in the absence of integration efforts."

1.7.1 Describe the new efforts in program year to integrate and coordinate the Energy Savings Assistance Program with the CARE Program.

The CARE and ESA Programs have had extensive coordination efforts in place over the past several years to simplify the enrollment process and eliminate duplication of efforts by customers. In 2020, with the enrollment challenges faced by ESA contractors due to COVID-19, coordinating with CARE Program activity continued to play an important part in ESA Program leveraging activity. Contractors leveraged CARE income verified customers to minimize the need to collect income document information for telephone enrollment efforts and utilized the single online application form for the CARE and ESA Programs as leads for follow-up calls for ESA Program enrollment. Customers enrolling in ESA, but not previously on CARE, can sign up for the CARE Program through the ESA Program agreement forms. Also, SDG&E's Customer Outreach team coordinates outreach opportunities when working with contractors and customers in the community.

1.7.2 Describe the new efforts in program year to integrate and coordinate the Energy Savings Assistance Program with the Energy Efficiency Residential Program.

Within the residential energy efficiency portfolio, SDG&E attempts to minimize confusion that property owners/managers may have regarding various program participation and eligibility requirements through the MF SPOC. The MF SPOC approach was authorized in D.16-11-022 to provide a one-stop shop for MF property owners and managers.[31] The MF SPOC leveraged the list of residential energy efficiency measure offerings available through the Multifamily Energy Efficiency Rebate (MFEER) Program and the Comprehensive Mobile Home Program (CMHP), in addition to all of the common area and tenant focused measures offered through the ESA Program. When the MF SPOC evaluates multifamily properties, internal

[31] D.16-11-022 at 202.

analytics are used to determine the likelihood of ESA Program eligibility for tenants while also supporting enrollment efforts in SDG&E's bill assistance programs, such as CARE, FERA, and the Medical Baseline Programs. As previously discussed, the MF SPOC also coordinates efforts between the SOMAH Program Administrator and ESA CAM initiatives to leverage leads across both programs.

The MF SPOC coordinates all common area and in-unit enrollments across low income and energy efficiency programs, thus creating a seamless and comprehensive whole building approach for the participant. The MF SPOC approach also allows for better visibility and identification of areas for refinements in the programs to improve property owner/manager satisfaction. In 2021, SDG&E plans to continue implementing similar collaboration efforts across other programs to maximize property owner touch-points being made by program implementers.

1.7.3 Describe the new efforts in program year to integrate and coordinate the Energy Savings Assistance Program with the Energy Efficiency Government Partnerships Program.

See Section 1.6.4 describing the current partnership with the SDCWA.

1.7.4 Describe the new efforts in program year to integrate and coordinate the Energy Savings Assistance Program with any additional Energy Efficiency Programs.

As described above, SDG&E's MF SPOC coordinates efforts targeted toward multifamily properties for energy efficiency programs. In cases where a multifamily property's common area meter is on a non-residential (commercial) rate, the MF SPOC is able to leverage non-residential energy efficiency programs to provide a property owner additional energy efficiency options, including the Business Energy Solutions (BES) Program, Energy Efficiency Business Rebate (EEBR) Program, Energy Efficiency Business Incentive (EEBI) Program, the Midstream Lighting Program, and the On-Bill Financing (OBF) Program. The process for intake

and qualification for the non-residential energy efficiency offerings is the same as the residential programs, allowing for a seamless and simple customer experience. In 2020, SDG&E's MF SPOC helped to enroll 34 properties into at least one Energy Savings Assistance or Energy Efficiency program.

1.7.5 Describe the new efforts in program year to integrate and coordinate the Energy Savings Assistance Program with the Demand Response programs, including successes in Air Conditioning Cycling or other Demand Response programs.

On December 27, 2018, the Commission approved SDG&E's Advice Letter 3250-E/2688-G, which requested authorization to include the Smart Thermostat measure as an ESA Program offering with modifications through 2020, while the above Smart Thermostat TOU Pilot directed in D.17-12-009 determined whether Smart Thermostats are an effective energy management tool. On March 31, 2020, the final pilot report was submitted to the Commission.

In 2020, ESA Program management reviewed Demand Response (DR) program offerings to ensure contractors were updated with the latest DR offerings. Contractors were provided with information on the current AC Saver Thermostat Program cash back offerings to share with customers at the time of Smart Thermostat installation. Additionally, contractors were provided with updated fact sheets to provide customers helpful energy savings tips and rate information. In 2020, SDG&E installed 194 smart thermostats, totaling $38,870.

1.7.6 Describe the new efforts in program year to integrate and coordinate the Energy Savings Assistance Program with the California Solar Initiative Programs.

SDG&E continued to work with GRID Alternatives, the SASH Program Administrator, to provide a list of CARE High Energy User (HEU) customers who had participated in the ESA Program. The referrals contained contact information, including: customer of record, address, phone number, preferred language, household size, and income. Customers are notified that they

may be contacted by GRID Alternatives through SDG&E's CARE approval letter, which is sent to customers once they have successfully completed the HEU verification process.

SDG&E also works with GRID Alternatives to enroll customers in the ESA Program based on SASH program participation. Once approved, all feasible ESA Program measures are installed in the home prior to the SASH program's installation of a solar system. In 2020, GRID Alternatives requested to transition to a semi-annual process for providing leads to SDG&E.

Additionally, SDG&E provided GRID Alternatives with a draft Non-Disclosure agreement for the DAC-SASH Program in preparation for data sharing efforts expected through DAC-SASH pursuant to D.20-12-003. At the end of 2020, SDG&E was still negotiating the details of the agreement with GRID Alternatives. Once completed, SDG&E will provide GRID Alternatives with annual data sharing outlined in D.20-12-003.[32]

1.7.7 Provide the number of referrals to the Single Family Affordable Solar Homes Program Administrator.

In 2020, SDG&E provided GRID Alternatives with referrals of ESA Program participants identified as CARE Program high energy users (HEU). Due to COVID-19 emergency customer protections, the CARE Program suspended recertification and income verification activity, including HEU verification, reducing potential leads for GRID Alternatives. Accordingly, SDG&E provided GRID Alternatives with 102 leads through this effort.

In 2020, GRID Alternatives requested to transition to a bi-annual process for providing SDG&E with list for potential customer projects. In 2020, SDG&E received one list from GRID Alternatives, which generated 189 ESA Program leads and 11 enrollments.

1.8 Workforce Education & Training

1.8.1 Please summarize efforts to improve and expand Energy Savings Assistance Program workforce education and training. Describe steps

[32] D.20-12-003, Appendix A at A-1-A-2.

taken to hire and train low income workers and how such efforts differ from prior program years.

In 2020, SDG&E's closed the Energy Innovation Center, the primary location for conducting workforce, education, and training (WE&T) classes, to in-person training due to the COVID-19 pandemic. The WE&T programs remained committed to continuing to provide contractors with learning opportunities through online courses and training opportunities. SDG&E provided email notifications to ESA Program contractors with relevant WE&T courses that may benefit their staff. Contractors can take advantage of classes offered and were encouraged to do so. There were no ESA Program specific trainings conducted in 2020; however, discussions to identify opportunities for increased collaboration between the ESA Program and WE&T occurred and will continue to be explored in 2021.

1.8.2 Please list the different types of training conducted and the various recruitment efforts employed to train and hire from the low income energy efficiency workforce.

See above section 1.8.1 for training conducted.

SDG&E contractors utilize various business development organizations as part of recruitment and hiring efforts. San Diego Workforce Partnership, San Diego Health and Human Services, San Diego Community College are some of the organizations utilized to find workforce resources for the ESA Program.

1.9 Legislative Lighting Requirements Status

1.9.1 Provide a summary on current and future CFL supply issues, as experienced by the IOU. Any current / future problems as well as potential solutions should be discussed in this paragraph.

Effective January 1, 2018, compact fluorescent lamps (CFLs) were no longer offered through the ESA Program pursuant to D.16-11-022.[33] Therefore, SDG&E did not offer this measure in 2020.

1.9.2 Provide a summary explaining how IOU promotes the recycling/ collection rules for CFLs.

See Section 1.9.1 above. SDG&E did not offer CFLs in 2020 and no recycling provisions were provided.

1.9.3 In addition, please briefly summarize the CFL procurement process for the IOU, including manufacturers, distributors, warehousing, and contractor delivery.

See Section 1.9.1 above. SDG&E did not offer CFLs in 2020.

1.10 Studies

1.10.1 For each Study, provide 1) a summary describing the activities undertaken in the study since its inception; 2) the study progress, problems encountered, ideas on solutions; and 3) the activities anticipated in the next quarter and the next year.

<u>D.16-11-022 and D.17-12-009 Evaluation Requirements</u>

Ordering Paragraph 52 of Attachment A to D.17-12-009 states:

> Pacific Gas and Electric Company, Southern California Edison Company, San Diego Gas & Electric Company and Southern California Gas Company shall apply the latest version of the Energy Division & Program Administrator Energy Efficiency Evaluation, Measurement and Verification Plan for the oversight, formation, description, tracking, review and approval, and initiation of their Evaluation, Measurement and Verification efforts. The utilities should update its impact evaluations to be in accordance with the guidelines established within this decision.

[33] D.16-11-022, OP 19 at 450.

In accordance with this direction, the IOUs have been working with the Energy Division on all approved studies. Draft and final research plans for each study were posted on the Commission's public document website and noticed to the applicable service list. A webinar was held for each study to present the draft results and to solicit discussion and comments on the draft documents. Comments were then considered for inclusion in the final documents. Furthermore, for each ongoing study the IOUs met regularly with the Energy Division to discuss progress and to resolve any issues.

The total Joint Utility study budget authorized in D.16-11-022 was $1,500,000.[34] SDG&E's portion of this amount is $225,000 or 15%. Funding for the 2022 LINA study was not included in this amount, but was approved in Advice Letters 4132-E (SCE), 5559 (SCG); 3478-E/2828-G (SDG&E), and 4193-G/5718-E (PG&E), all dated December 20, 2019. The total budget allocated to statewide studies, including the 2022 LINA, is $2,000,000 statewide, and SDG&E's portion is $300,000. In addition, SDG&E was authorized $200,000 to spend on undetermined "rapid feedback" analysis.[35] The studies conducted in 2020 are discussed below.

Statewide Low-Income Needs Assessment (LINA) Study

During 2020, there were numerous planning activities for the upcoming 2022 LINA Study. The LINA is a mandated study required to be completed every three years per Assembly Bill (AB) 327 and Public Utilities Code (P.U. Code) Section 382(d). Authorization for the fifth LINA Study was provided on January 19, 2020 in response to Advice Letter 4132-E requesting the use of unspent funds to initiate the 2022 LINA. An initial set of suggested topics for the work scope were presented on April 3, 2020 and again on July 21, 2020 at pre-Request for

[34] D.17-12-009, Attachment A, at 214, OP 8 at 455-456 and OP 56 at 475.
[35] D.17-12-009, Attachment A, OP 51 at 473.

Proposals (RFP) public webinars prior to finalizing the RFP. The Low Income Oversight Board and other parties provided comments and suggestions on the proposed scope of work, some of which were accommodated by the final RFP distributed to potential bidders. The RFP was distributed on August 19, 2020 and bidder proposals were received by September 16, 2020. The project was awarded to Evergreen Economics and the statewide contract holder, Southern California Edison Company, was finalizing the contract at 2020 year-end. No funds were expended during 2020. The study will be completed with the final report available in December 2022.

The 2022 LINA is focused on understanding the energy needs of California's large low-income renter population, including those living in single family homes and different types of multifamily properties. In particular, the study will (a) identify renter needs addressed or not addressed by the program; (b) identify needs among specific sub-groups of renters; (c) outline program, policy, and market barriers with potential solutions to serving the rental market; and (d) as appropriate, recommend how ESA may better assist renters with the bill savings and/or ameliorate Health/Comfort/Safety (HCS) Hardships. The LINA Study is expected to employ multiple methods of data collection and analysis including review of existing research, analysis of existing secondary data, collection and analysis of survey data with rental customers and interview data with renters and landlords of different types of properties.

ESA Non-Energy Benefits Study

A study to update the non-energy benefits used in the ESA cost-effectiveness tests was conducted by Skumatz Economic Research Associates and Navigant Consulting, and completed

in August 2019.[36] At the conclusion of the study, parties requested a follow-up review and assessment of the results.

In April 2020, SDG&E, on behalf of the IOUs, contracted with APPRISE Inc. to assess the results of the 2019 Non-Energy Benefits Study. The work scope, approved by the Energy Division in 2019, also included tasks to improve the calculations and allocation method to the extent possible without additional research and to create a simplified Excel tool which the IOUs could use to calculate the benefits. This project was co-funded among the four IOUs using the Rapid Feedback and Analysis budget.

On November 25, 2020 APPRISE Inc. delivered the draft report and Excel tool. The draft report was posted for stakeholder review on December 21, 2020. Due to other activities and priorities occurring during the month of December, the Energy Division requested the stakeholder webinar be postponed until January 6, 2021.

Rapid Feedback Local Research

In 2020, SDG&E used a portion of the Rapid Feedback budget that was approved in OP 51 of Attachment A to D.17-12-009 to fund the APPRISE Inc. Non-Energy Benefits Assessment described above.

1.10.2 If applicable, submit Final Study Report describing: (1) overview of study; (2) budget spent vs. authorized budget; (3) final results of study; and (4) recommendations.

The only study completed in 2020 was the Non-Energy Benefits (NEBs) assessment conducted by APPRISE, Inc. and a summary is included below.

[36] California Energy Efficiency, *ESA Non-Energy Benefit Final Report* (August 29, 2019) available at https://pda.energydataweb.com/#!/documents/2295/view

The Non-Energy Benefits Assessment's primary study objectives were 1) review and assess the 46 NEBs from the 2019 Skumatz Navigant Study; 2) review and assess the 2019 study's proposed alternative allocation of NEBs to program measures; 3) improve the NEB calculations and allocation method to the extent possible without additional research; 4) provide a simplified Excel-based tool for estimating the NEBs; and 5) document the results in a written report. The statewide budget for the study was $150,000 and the amount spent was $149,951.

The study successfully addressed all of the objectives. The final report documented reasons for either including or omitting each of the 46 proposed NEBs from the 2019 Study. For the NEBs that remained, data sources and calculations were updated and improved. The results of this study reduced the uncertainty in the NEB calculations, verified, and in some cases, improved the data sources, recommended a simplified measure allocation method, and created a simplified Excel tool. It is important to recognize, that the NEB values remain imprecise estimates and additional primary research is recommended. For example, some of the inputs taken from secondary data are still from older studies of programs not fully representative of California's climate and program offerings. In addition, many of the NEBs are estimated as a function of average energy bill savings. While it may not be ideal for NEB estimates to be dependent on savings, alternate methods were not available at this time. The final report can be found at:

https://pda.energydataweb.com/api/view/2471/Final%20CA%20ESA%20NEB%20Report%201-25-21_.pdf

1.11 Pilots

1.11.1 For each Pilot, provide 1) a summary describing the activities undertaken in the study since its inception;2) the study progress, problems encountered, ideas on solutions; 3) the activities anticipated

in the next quarter and the next year; and 4) Status of Pilot Evaluation Plan (PEP).

At the request of the Energy Division, the three California electric IOUs each ran a year-long pilot focused on identifying how to ease the transition to a time-of-use (TOU) rate for low-income customers in hot climate zones.[37] The TOU rate is meant to encourage residential customers to shift their usage away from the hours when the most electricity demand on the grid occurs. Pilot evaluation results were based on qualitative data collection through three surveys augmented by advanced meter infrastructure data analysis.

This pilot aimed to understand if smart thermostats were a useful tool in transitioning low-income customers to a time-of-use billing rate. Evergreen Economics was retained to evaluate this pilot, which commenced during the second half of 2018. Customers were recruited into the pilot by the IOUs and were told they would be placed in one of two groups:

1. (Quasi) Control group: Customers in this group were transitioned to a TOU rate and kept their current thermostat but still received the treatment of a rate change.
2. Treatment group: Customers in this group were transitioned to a TOU rate, with installation of Ecobee smart thermostats enabled with an "eco plus" feature, a peak relief functionality to automate energy savings during the peak period.

The first of three surveys were distributed in December 2018 and January 2019, which provided a baseline to assess whether having a smart thermostat changed the way low-income customers react to the TOU rates. All pilot participants were given bill protection for the pilot year, which would credit any amount of payment over what would have been billed on a tiered rate. Customers were randomly assigned to either a control or treatment group. In early 2019,

[37] D.17-12-009, OP 147 at 506.

customers were told which group they were assigned to and were transitioned to the new rate at the start of their monthly billing cycle. The IOUs hired implementation contractors to install smart thermostats and educate customers about the thermostat functions.

In the late summer of 2019, the thermostat manufacturer notified the study team that the eco plus functionality had not been included in the pilot thermostats due to an oversight, meaning that customers had not been automatically shifted away from heating and cooling usage during the peak TOU hours for the majority of the pilot period. The functionality was then provided to a subset of the participants, and the treatment group was divided into two distinct sets of pilot participants: 2A: treatment group with smart thermostat (no eco plus); and 2B: treatment group with smart thermostat and eco plus enabled. The peak relief functionality analysis was then limited to a shorter period of time (August through November 2019) when eco plus was enabled, rather than a full year of customer interaction with this technology as originally planned. While this compromised the research as originally planned, the IOUs worked with the pilot evaluator to make changes to revise the remaining surveys and the research plan to adjust for this unexpected event, and two modified surveys were deployed in November 2019 and January 2020, respectively.

Another challenge encountered and lesson learned involved customer attrition over the course of the pilot. This was due to several reasons including incompatible equipment in households, homeowner lack of desire for a smart thermostat, and refusal due to health or comfort reasons. The final analysis sample for SDG&E included 79 households in the control group and 76 households in the treatment group with 34 of these having the eco plus functionality installed.

Key pilot findings are summarized below. Due to the small sample sizes, results may not be representative of a larger population.

- Almost half of the savings attributed to the TOU transition occurred during peak hours for SDG&E.[38]
- Survey responses from customers reflected a general understanding of the TOU period, as well as of the items in their home that use the most energy.
- SDG&E customers used the thermostat to save more energy in the winter (reduced heating) than in the summer (reduced AC), but did cut back in both seasons (beyond what the control group could do).

A webinar was held on March 17, 2020 to present pilot findings and answer stakeholder questions. The pilot final report, incorporating survey findings and data analysis results, was published in March 2020.[39] The final cost for SDG&E's portion of the statewide pilot evaluation was $79,232 bringing SDG&E's total implementation cost for the 2017-2020 cycle to $104,820 (including the aforementioned pilot costs).

1.11.2 If applicable, submit Final Pilot Report describing: 1) Overview of pilot; 2) Description of Pilot Evaluation Plan (PEP); 3) Budget spent vs. authorized budget; 4) Final results of pilot (including effectiveness of the program, increased customer enrollments or enhanced program energy savings); and 5) Recommendations.

See discussion in Section 1.11.1.

1.12 "Add Back" Measures

For measures that fall below the cost effectiveness threshold under Decision 08-11-031,[40] we require additional reporting to show the cost, energy savings impacts, and related metrics.

---

[38] For SDG&E, average daily usage decreased by 1.26 kWh (plus or minus 0.48), with peak hour reduction averaging 0.56 kWh (plus or minus 0.19). Peak hours for SDG&E were 4 p.m. to 9 p.m.
[39] Evergreen Economics, *Evaluation of the California Statewide Smart Thermostat Time of Use Pilot* (March 31, 2020), available at https://pda.energydataweb.com/#!/documents/2359/view
[40] Prior to Decision 14-08-030, proposed ESA measures were required to meet a cost effectiveness threshold of 0.25. Measures that did not meet this threshold but were authorized to remain in the program were called "addback measures."

1.12.1 If the "add-backs" compromise the IOUs' ability to meet the 2020 Plan goal that 100% of eligible and willing customers will have received all cost effective Energy Savings Assistance Program measures, how does the IOU propose to address the shortfall in other parts of the Energy Savings Assistance Program?

Add back measures have not negatively impacted the ESA Program.

1.13 Low Income Working Groups

D.16-11-022, as modified by D.17-12-009, directed the ESA Cost Effectiveness Working Group, a new Multifamily Working Group (MFWG), and Demand Analysis Working Group (DAWG) to review components of the Commission's ESA and CARE Programs to make recommendations for refinements to improve, wherever possible, the design, administration, delivery, reporting, and ultimate success of these programs. The 2020 Working Group activities are summarized below.

ESA Cost Effectiveness Working Group

The tasks for the ESA Cost Effectiveness Working Group concluded prior to 2020, therefore this working group did not meet in 2020.

Multifamily Working Group

The MFWG was established to support the integration of common area measures for deed-restricted MF properties into the ESA Program and other MF directives as specified in D.16-11-022 and modified by D.17-12-009. The tasks for the MFWG concluded in 2019.

Demand Analysis Working Group

D.17-12-009, Attachment A, OP 8 at 456 states: "The Demand Analysis Working Group [DAWG] should act as the established forum for providing input into the scope, modeling and analysis of results associated with Energy Efficiency Potential Study."

On October 8, 2020 the DAWG hosted a webinar to present the work plan for the 2021 CPUC Efficiency Potential and Goals Study. The portion of the study related to low-income was

given only a brief, high-level overview. A follow-up meeting was hosted by the Energy Division on November 23, 2020 to discuss the low-income portion of the study in more detail. SDG&E reviewed the work plan and provided comments.

1.14 Annual Public ESA Program and CARE Meeting

In compliance with D.17-12-009, the IOUs held a joint public meeting via webinar on June 22, 2020 to present an overview of 2019 ESA Program and CARE Program results.[41] Specifically, SDG&E's presentation showed it achieved and exceeded the 2020 Initiative ESA Program homes treatment goal at 108% in 2019 which was accomplished through outreach and marketing efforts of the program. Also, SDG&E's presentation showed an increase in the CARE penetration rate to 95%, which exceeded the program target of 90%.

1.15 Multifamily Properties

1.15.1 The IOUs shall conduct and report an annual analysis of the square footage, energy consumption, ESA Program participation, and time since the last retrofit of non-deed restricted multifamily properties with a high percentage of low income tenants.

In 2020, SDG&E hired Res-Intel to conduct a multi-family property characterization study. The study identified and characterized multi-family properties in San Diego's service area. A dataset was provided that included data on various property characteristics including conditioned area square footage as well as premises and service points for electric and gas. SDG&E used the results of that study to provide the analysis shown below.

Properties characterized as "market rate" (with no rent restrictions) were chosen for the analysis. Properties with a high proportion of low income tenants were then identified using a proxy code from SDG&E's customer data matched to each premise. A total of 8,910 properties

[41] D.17-12-009 adopted the provision set forth in D.12-08-044 which ordered the IOUs to convene a minimum of one public meeting per year, within 60 days of filing the annual report.

fit these criteria. Annual electric and gas consumption was then collected for each of these sites and categorized by common areas, tenant areas, and master meters. Finally, program participation records were queried for treatment dates at these properties.

As shown in the tables below, annual consumption for these properties in 2020 was 304,153 MWh and 14,653,455 therms. Furthermore, 7,283 of these properties received treatment through the ESA Program over the last 10 years with 665 of those treated in 2020.

It is important to note that this analysis differs in part from the analyses described in the PY 2018 and PY 2019 Low Income Annual Reports. Primarily, the dataset developed by Res-Intel provided the basis for identifying relevant properties and associated premise numbers for the analysis.

SDG&E Multi-Family Non-Deed Restricted Property Analysis – Property Characteristics

Estimated Number of Properties	Average Conditioned Area Square Footage	Number of Properties Treated by ESA in Last 10 Years	Number of Properties Treated by MFEER or MIDI in Last 10 Years
8,910	7,482	7,283	227

SDG&E Multi-Family Non-Deed Restricted Property Analysis – Annual Consumption

	Total Annual Consumption	Total Common Areas Consumption	Total Annual Consumption for Units	Total Annual Consumption for Master Meters
MWh	304,153	21,998	281,237	918
Therms	14,653,455	436,848	6,815,198	7,401,409

The Program Participation Table below reflects the last installation date at the property. Therefore, properties treated over multiple years are counted only in the last year treated.

Program Participation[42]

Year Last Treated	# Properties Treated through ESA	# Properties Treated through MFEER	# Properties Treated through MIDI[43]
2011	28	8	0
2012	53	16	0
2013	68	12	0
2014	107	4	2
2015	106	6	0
2016	97	6	0
2017	117	24	1
2018	683	13	0
2019	283	8	0
2020	665	0[44]	0

1.15.2 The IOUs shall describe the activities conducted in multifamily properties for multifamily common area measures under the ESA Program.

In 2020, SDG&E continued its outreach efforts by utilizing its MF SPOC and third-party implementer to further promote the initiative within the multifamily space. To increase prioritization of energy efficiency and persuade property owners to participate in ESA CAM, SDG&E developed a case study that highlighted and clearly demonstrated the potential benefits of program participation for both property owners and their tenants. In August 2020, SDG&E's MF SPOC held a virtual Multifamily Solutions Roundtable event inviting San Diego Housing Federation association members to learn more about State Assembly Bills that affect the energy landscape and provided information on energy efficiency rebates and incentives available for the Multifamily sector. Furthermore, SDG&E's MF SPOC hosted a virtual booth during the

[42] Note that results shown for 2011 through 2019 used the previous methodology described in the SDG&E PY2018 and PY2019 Low-Income Annual Reports.
[43] Due to lack of participation and low cost-effectiveness, SDG&E closed the Middle Income Direct Install (MIDI) program at the end of 2019, via Advice Letter 3429-E/2797-G, approved December 20, 2019 and effective January 1, 2020.
[44] The MFEER program did treat properties in 2020; however, those properties did not meet the criteria to be included in this analysis. Specifically, they were not identified as having a high proportion of low-income tenants.

Housing CA conference to raise awareness of Energy Efficiency programs available to Multifamily properties in SDG&E's service territory. SDG&E's MF SPOC networking and outreach efforts have contributed to the success of ESA CAM Initiative program referrals; through 2020, approximately 28% of ESA CAM total property leads were facilitated by SDG&E's MF SPOC. These MF SPOC referrals to ESA CAM amounted to roughly 55% of all ESA CAM enrollments for 2020. The ESA CAM 2020 goal was 45 properties treated and 100 properties treated for the overall 2017-2020 cycle goal. As demonstrated in the table below, SDG&E treated 57 properties in 2020, bringing its cumulative total to 62 (five properties treated in 2019). Below is a summary of the ESA MF CAM Initiative accomplishments for 2020.

Description	Target	Actual	% of Target
# of Buildings targeted in 2020	330	345	105%
# of MF CAM properties treated in 2020	45	57	127%
Total # of MF CAM properties treated	100	62	62%
2020 kWh Savings	1,184,499	777,366	66%
2020 kW Savings	496	152	31%
2020 Therm Savings	55,129	5,686	10%

There were challenges and lessons learned during the implementation of the ESA CAM Initiative. One challenge was the 65% income eligibility threshold, which allows the common areas of a property to qualify for treatment only if a minimum of 65% of the units are occupied by low-income tenants. Because of this threshold, 17% of all program leads were disqualified. Approximately 23% of the 345 total program leads led to enrollments.

A second challenge was that although energy efficiency was a priority to many property managers, it conflicted with other priorities, even if energy efficiency opportunities existed for the property. As property managers were stretched thin, managing COVID-19 across portfolios, it was difficult to prioritize obtaining documentation for eligibility or submitting requested signatures on forms. Another challenge was the ESA Program (in unit) requirement where a

multifamily building needs to have five or more units to receive ESA CAM treatment. SDG&E identified five properties that were unable to receive ESA CAM treatment since they did not meet this building requirement threshold as authorized by the Commission in the statewide ESA Program Policy and Procedures Manual.

Finally, SDG&E's limited internal data for comprehensive MF targeting provided an additional challenge. Important data such as square footage used for energy benchmarking, amenities on properties, and deed-restricted status was not readily available when SDG&E implemented its initial targeting strategy and throughout the 2020 program year.

To address the above-mentioned challenges, SDG&E is making a concerted effort to increase the number of leads in its pipeline to reach the total initiative goal and streamline operational processes in 2021. For example, SDG&E plans to continue collaboration with the SOMAH Program to leverage leads across ESA programs. To continue raising multifamily market awareness of the ESA initiatives, SDG&E will continue to attend multifamily affordable housing events and conferences where SDG&E works with housing associations and to spread the word about program benefits to members who are the appropriate decision makers. In addition, in an effort to streamline processes and further minimize customer touchpoints, SDG&E is now collecting all eligibility documentation and signatures up front, while also advising property owners during the audit review of all necessary signatures and forms that will be needed further along in the process.

Finally, SDG&E's MF SPOC has completed work with a third party vendor who provided the following three services to improve data for comprehensive MF targeting efforts: 1) linked service accounts to a specific multifamily property by creating a Multifamily Property ID as a unique identifier; 2) added valuable real estate data taken from San Diego County Assessor

Records and CoStar such as square footage, number of units, and amenities; and 3) developed Energy Use Intensity and Energy Benchmark scores for each property. SDG&E documents several key statistics from the resulting multifamily property dataset:

- There are an estimated 33,199 multifamily sites in San Diego and Orange County. Of these, 31,985 match with at least one SDG&E gas or electricity meter, and 27,654 have sufficient data to construct an energy consumption profile.
- 67% of multifamily properties have fewer than five units. The other 33% are composed of larger than 5+ unit properties.
- More recent building vintages are typically larger because (1) they house more units, and (2) they have greater floor area per unit.
- Newer vintages make up a greater share of the housing stock in inland regions that experience greater extremes in outside temperatures.

Through these combined efforts and with the use of the MF Market Characterization data set, SDG&E hopes to strengthen its targeted multifamily marketing strategy and establish more leads in 2021 in order to reach the total property goal for the ESA CAM Initiative.

1.15.3 Normalized Metered Energy Consumption Analysis of Multi-family Properties

Energy Division requested the IOUs provide a Normalized Metered Energy Consumption (NMEC) analysis on multi-family properties treated through the ESA CAM initiative.[45] The analysis requires twelve months of consumption data metered prior to measure installation date and twelve months of consumption data metered after the installation date. As such, the analysis can only be provided at this time for properties treated prior to January 2020.

Five properties were treated with common area measures during the period of September 2019 through December 2019. Installed measures include lighting, refrigerators, power strips, heat pumps, pool pumps, and minor repairs. Deemed savings reported for these installations

[45] D.17-12-009 at 204.

were 28,505 kWh, 3 kW, and negative 66 therms. Negative therms are due to interactive effects from lighting installations. These were not estimated as part of the NMEC analysis.

Evergreen Economics was hired to perform a site level NMEC analysis on each of the five properties. In addition to normalizing for weather differences across years, the analysis also included comparison with a matched nonparticipant group to control for changes in energy usage due to the COVID-19 pandemic.

As shown in the table below, all but one of the properties showed statistically significant savings after controlling for weather and COVID-19 impacts.

NMEC Analysis Results

Property	Predicted Annual Savings (kWh)	Estimated First Year Savings (kWh) from NMEC Analysis	Percent Savings[46]	Impact on Savings Estimate from Covid-19 Adjustment (kWh)	Impact on Savings Estimate from Weather Normalization (kWh)
1	16,119	~~21,988~~ 22,065	43%	~~-350~~ 311	~~-701~~ -753
2	1,055	~~Not Significant~~ -130	~~N/A~~ -2%	~~N/A~~ 0	~~N/A~~ -10
3	2,910	~~569~~ 1,152	1%	~~-2,392~~ -1,162	~~-45~~ -1
4	5,688	~~13,666~~ 13,020	~~28%~~ 29%	~~4,958~~ 3,110	~~350~~ 427
5	2,733	~~11,651~~ 10,265	~~10%~~ 9%	~~526~~ 1,854	~~-350~~ -696
Totals	**28,505**	**~~47,874~~ 46,372**			

[46] Percent savings is the percentage of baseline consumption saved as a result of the program treatment.

2. CARE EXECUTIVE SUMMARY

Summary of 2020 Results

This report provides SDG&E's CARE Program accomplishments and expenditures for program year 2020. At year-end 2020, there were 338,573 customers participating in the CARE Program for an overall penetration rate of 112%.

Procedural Background

The CARE Program, formerly known as the Low-Income Ratepayer Assistance (LIRA) Program, was established through legislative mandate[47] and implemented by the Commission in D.89-07-062 and D.89-09-044. In 1992, the Commission expanded the program to qualified non-profit group living facilities such as women's shelters and homeless shelters in response to additional legislation.[48] In D.95-10-047, CARE was further expanded to qualified agricultural housing facilities; and D.05-04-052 more broadly expanded the program to include agricultural housing and non-profit migrant farm working housing centers.

Since 2005, income eligibility for CARE has been set at 200% of the Federal Poverty Guidelines (FPG).[49] In 2006, the Commission authorized the IOUs to implement: (1) categorical eligibility to allow customers to qualify for the CARE Program based on participation in certain state or federal assistance programs; (2) four-year recertification for income-qualified customers

[47] Senate Bill (SB) 987 (enacted in June 1988) directed the Commission to establish a program of assistance to low income customers to mitigate the impact caused by the narrowing of the baseline/non-baseline differential and that the cost of the assistance program was not to be borne solely by any single class of customer.
[48] SB 693 extended CARE benefits to qualifying group living facilities. SB 491 changed the program's name and modified CARE to include women's shelters, hospices, and homeless shelters. AB 3429 expanded the CARE Program to include migrant farmworker housing, employee housing, and agricultural employee housing.
[49] D.05-10-044, OP 1 at 35.

with fixed incomes; (3) a telephonic process to enroll certain prospective CARE qualified households; (4) a process for all customers to recertify CARE eligibility through SDG&E's Interactive Voice Recognition system; and (5) internet-based CARE enrollment and recertification.[50]

The Commission further expanded the list of categorically eligible programs in D.08-11-031 to align with the program-based eligibility programs adopted for the Commission's California Lifeline Program[51] and established an enrollment target for CARE at 90% of the estimated eligible population.[52]

In 2010, the legislature enacted SB 695 which modified Section 739.1 of the California Public Utilities Code to state that eligibility for the CARE Program should be no greater than 200% of FPG.

In D.12-08-044, the Commission approved SDG&E's CARE Program plans and budget for program years 2012-2014. The Commission focused on developing controls to ensure that customers enrolling in the CARE Program are truly eligible for the benefits and also directed the IOUs to provide an increased focus on enrolling hard-to-reach customers, such as Limited English Proficient (LEP), hearing impaired, and visually impaired customers. Key directives in D.12-08-044 included: (1) establishment of a High Usage Verification process for customers with electric usage exceeding 400% of their baseline allowance;[53] (2) updates to the utilities' probability models to include more indicators, i.e. method of enrollment and household size;[54] (3) a process to review the list of categorical programs annually to ensure only programs aligned

[50] D.06-12-038 at 56.
[51] D.08-11-031, OP 7 at 220.
[52] *Id.* at 6-7.
[53] D.12-08-044 at 17.
[54] *Id.* at 214.

with the CARE guidelines are included;[55] and (4) approval of outreach and marketing funds focused on targeted multicultural/multilingual and LEP customers.[56] The Commission also retained the target of reaching a 90% penetration rate and the enrollment of all eligible and willing customers into the CARE Program.[57]

In October 2013, the California Legislature enacted AB 327, which had several impacts to the CARE Program. Most notably, the bill required the IOUs to restructure CARE rates and to set an effective electric rate discount between 30-35%. In response, the Commission initiated Phase 2 in rulemaking (R.) 12-06-013 to address the CARE rate reform requirements from AB 327. As part of the rulemaking, SDG&E proposed to simplify the CARE rate structure by removing the discount from volumetric rates (with the exclusion of the exemption from Department of Water Resources Bond Charge (DWR-BC), California Solar Initiative (CSI), and CARE charges) and to instead provide a line-item discount off a bill calculated at standard rates. SDG&E's proposed CARE revisions were approved in Phase 2 via D.14-06-029.[58] Pursuant to that decision, SDG&E filed Tier 1 Advice Letter 2617-E to implement the changes in rates and propose a glidepath to set an effective CARE discount within the 35% statutory maximum by 2018.[59] This resulted in low-use CARE customers receiving a more equivalent discount when compared to high-use CARE customers. The resulting CARE rate subsidies are reflected in the Total Rate Adjustment Component (TRAC) for recovery through Public Purpose Program (PPP) rates. Subsequently, in Phase 3 of the rate restructuring proceeding, the Commission directed

[55] *Id.* at 15.
[56] *Id.* at 10.
[57] *Id.* at 15.
[58] D.14-06-029, OP 3 at 61.
[59] *Id.*, OP 5 at 62.

SDG&E to recalculate the glidepath for purposes of creating an effective 35% CARE discount by 2020 rather than 2018.[60,61]

The Phase 3 decision in the rate restructuring proceeding also initiated a CARE restructuring working group to assess whether the Commission should take any action on a proposal to restructure the CARE Program, which resulted in various workshops and status reports.[62] The CARE restructuring proposals included a greater discount on Tier 1 usage or tiered rate discounts with a greater discount for those in a lower income group. In September 2019, the Commission did not further restructure the CARE Program pursuant to the working group's proposals because no proposed alternative was more equitable or efficient in protecting low-income customers when compared to the current structure.[63]

In D.14-08-030, the Commission addressed the outstanding 2012-2014 Low Income Program Phase 2 issues identified in D.12-08-044, authorized a 12-month bridge funding period for 2015, made minor corrections and clarifications to D.12-08-044, adopted recommendations from the 2013 LINA study for CARE, and continued further review on issues regarding the definition of income and issues related to the qualifying list of categorical eligibility programs. In addition, D.14-08-030 determined that it was reasonable to continue funding the Community Help and Awareness of Natural Gas and Electricity Services (CHANGES) Pilot Program from the CARE budget, pending further review during the bridge period, and authorized continued funding.[64]

---

[60] D.15-07-001 at 236.
[61] SDG&E Advice Letter 3055-E, subsequently modified in Advice Letter 3055-E-A, effective September 1, 2017 and approved on September 18, 2017.
[62] *See, e.g.,* Status reports on CARE restructuring filed in R.12-06-013 on June 6, 2016, October 27, 2016, August 31, 2017, and April 19, 2019.
[63] D.19-09-004 at 15-16.
[64] D.14-08-030, OP 48 at 123.

In D.15-12-047, the Commission approved the CHANGES Program as an ongoing statewide program effective January 1, 2016 and made the following determinations regarding the continuation of the CHANGES Program:

- The program will provide outreach, education, and bill issue assistance on natural gas and electricity bills and services to limited English proficient customers through a statewide network of CBOs;[65]
- The program will be managed by the Commission's Public Advisor's Office with technical assistance and input from the Energy Division;[66]
- Until a long-term funding source can be established through the budgetary and/or legislative channels, the ongoing CHANGES Program will be funded as a reimbursement from the CARE Program, through the end of the current 2015-2017 program cycle, and may be renewed by the Commission, as needed, into the next CARE Program cycle;[67] and
- In the future, the funding for CHANGES will ideally come from the Commission's reimbursable budget because it will provide greater latitude to address a range of energy assistance needs experienced by California's low-income population, the LEP population, and population with disabilities.[68]

In November 2016, the Commission issued D.16-11-022, as modified by D.17-12-009, to approve SDG&E's CARE Program plans and budget for program years 2015-2020.

In June 2019, the Commission issued Guidance Decision D.19-11-022 directing the IOUs to file Applications for ESA and CARE program plans and budgets for program years 2021 through 2026, and also approved program year 2021 bridge funding for the ESA and CARE Programs with authorized spending up to 2020 program year levels for six months to a year pending the Energy Division's approval of a Tier 1 Advice Letter. In accordance with the

[65] D.15-12-047 at 2.
[66] *Id.*
[67] *Id.* at 3.
[68] *Id.*

Guidance Decision, SDG&E timely filed the Low Income Application for program years 2021 through 2026 in November 2019.[69] A decision is pending.

In March 2020, Governor Newsom declared a State of Emergency and ordered Californians to shelter in place in response to the COVID-19 pandemic. In April 2020, the Commission adopted Resolution M-4842, which directed energy, communications, and water corporations in California to retroactively apply customer protection measures during the COVID-19 pandemic from March 4, 2020 for up to one year with an option to extend. Shortly thereafter, SDG&E submitted Advice Letter 3516-E-D/2854-G-D which detailed specific emergency customer protections that SDG&E would offer for residential and small business customers impacted by the COVID-19 pandemic. As part of this Advice Letter, SDG&E made the following CARE Program changes to support low-income residential customers effective March 2020:

- Froze all standard and high-usage reviews for CARE program eligibility for 12 months and potentially longer, as warranted;
- Contacted all community outreach contractors, the community based organizations who assist in enrolling hard-to-reach low-income customers into CARE, to help better inform customers of the eligibility changes;
- Partnered with the program administrator of the customer funded emergency assistance program for low-income customers and increase the assistance limit amount for 12 months;
- Indicated how the ESA Program can be deployed to assist customers;
- Suspended all CARE and FERA program removals and discontinued all recertification and verification requests that require customers to provide income verification.[70]

---

[69] Application (A.)19-11-005, *Application of San Diego Gas & Electric Company for Approval of Low-Income Assistance Programs and Budgets for Program years 2021-2026* (November 4, 2019).
[70] Subsequently, the Commission extended the customer protections to June 30, 2021 in Resolution M-4849, issued on February 11, 2021.

2.1 Participant Information

2.1.1 Provide the total number of residential CARE customers, including submetered tenants, by month, by energy source, for the reporting period and explain any variances of 5% or more in the number of participants.

Residential CARE Program[71]						
Electric Customers by Month				Gas Customers by Month[72]		
PY 2020	CARE Customers	Percentage Change		PY 2020	CARE Customers	Percentage Change
Jan	302,943	0.4%		Jan	190,090	0.5%
Feb	304,015	0.4%		Feb	190,754	0.3%
Mar	310,074	2.0%		Mar	194,938	2.2%
Apr	316,330	2.0%		Apr	199,038	2.1%
May	323,082	2.1%		May	203,568	2.3%
Jun	326,930	1.2%		Jun	206,031	1.2%
Jul	329,907	0.9%		Jul	207,974	0.9%
Aug	332,097	0.7%		Aug	209,561	0.8%
Sep	333,825	0.5%		Sep	210,724	0.6%
Oct	335,182	0.4%		Oct	211,670	0.4%
Nov	337,214	0.6%		Nov	212,971	0.6%
Dec	338,573	0.4%		Dec	213,934	0.5%

2.1.2 Describe the methodology, sources of data, and key computations used to estimate the utility's CARE penetration rates by energy source.

SDG&E used the joint utility methodology adopted by the CPUC in D.01-03-028 for developing monthly and annual penetration estimates in 2020.[73,74] This methodology entails annual estimation of eligibility for CARE, ESA, FERA, and other income-by-household size

[71] Due to the timing of collection of CARE enrollment data, numbers throughout this report may vary slightly based on reporting timeframe from each monthly report throughout the year.
[72] Gas Customers by Month is a subset of the Electric Customers by Month.
[73] D.01-03-028 at 49-50.
[74] Compliance Filing of Pacific Gas & Electric (U 39-M) on Behalf of Itself, Southern California Gas Company (U 904-G), San Diego Gas & Electric Company (U 902-M) and Southern California Edison Company (U 338-E) Regarding Annual Estimates of CARE Eligible Customers and Related Information as reflected in A.14-11-007, et al. Originally filed on February 12, 2020 and revised on March 17, 2020. Athens Research produces the report that is included as part of this compliance filing.

parameters at the small area (block group, census tract, ZIP+2, etc.) for each IOU territory and for the state as a whole.[75]

Sources for the 2020 eligibility estimates include the January Health and Human Services (HHS) Poverty Guidelines[76] ("bundling" one- and two-person households at the HHS-defined 200% FPG limit as required by AB 327), current year small-area vendor marginal distributions on household characteristics, Census 2010 Summary File 3 (SF3) data, Census American Community Survey 2015-2019 Public Use Microdata Sample (PUMS) data, utility meter and master meter household counts, Department of Finance Consumer Price Index series, and various Geographic Information System sources.

The method takes into consideration American Community Survey microdata relationships between guideline status (above/below 200% FPG), tenure, and fuel payment relationships. These cross classifications are fitted to small area (block group) marginals to produce payer type specific distributions, which can be aggregated to various other geographical levels.

The method also incorporates the impact of labor force changes (unemployment and other forms of job separation, as well as positive changes), and adjusts block-group marginal distributions on household income based on sub-state modeling that incorporates Current Population Survey, Integrated Public Use Microdata Survey Data, American Community Survey Data, and California Employment Development Department (EDD) county and Metropolitan Statistical Area level labor force series. This adjustment to block-group income marginal is then

[75] Athens Research performs the analysis using the joint utility methodology to provide the estimates for the California IOUs. The methodology described below is detailed within the Athens Research report.
[76] *See,* Federal Register / Vol. 85, No. 12 / Friday, January 17, 2020 / Notices, pp. 3060-3061.

incorporated into the otherwise "standard" estimation approach to produce small area estimates reflecting small area income changes due to labor market forces.

Estimates from the block-group level are aggregated to county/utility and whole utility level, among other aggregations. Annually, SDG&E applies county/utility level eligibility fractions to a new set of "technical eligibility counts" (for CARE these are metered and sub-metered occupied housing units) obtaining an estimate of income/demographic eligibility in household count form.

SDG&E counts the number of households (by small area, by county, and overall) that are enrolled in CARE. The CARE household total, including individually metered and sub-metered occupied housing units, is divided by the total income/demographic eligibility.

2.1.2.1 Describe how the estimates of current demographic CARE-eligibility rates, by energy source for the pre-June 1st periods, were derived.

The joint utility methodology, as described above, was used throughout 2020.

2.1.2.2 Describe how the estimates of current CARE-eligible meters were derived. Explain how total residential meters were adjusted to reflect CARE-eligible meters (i.e., master meters that are not sub-metered or other residential meter configurations that do not provide residential service.)

CARE eligibility rates by small and large areas are developed so they only apply to individual residential meters and sub-metered dwelling units. Non-sub-metered master meters and other meters that do not provide residential service are not included in the "technical eligibility" meter counts.

2.1.2.3 Discuss how the estimates of current CARE-eligible households were developed.

See SDG&E's above response for Section 2.1.2. Note that the methodology is based on estimating small area (block group) level household size by income and householder-age

tabulations for the current year and connecting these estimates with small area counts of households that are individually metered or sub-metered. Block-group/utility-specific estimates are then disaggregated/aggregated to various geographic levels within a given utility area: zip+2, zip, tract, county, territory, etc. Statewide estimates, regardless of utility boundaries, are also provided at small and large area levels.

2.1.2.4 Describe how current CARE customers were counted.

SDG&E runs a report of active CARE participant statuses for each month, in the Customer Assistance Reporting and Enrollment System (CARE System), which is the system of record for CARE applications and includes both individually metered and sub-metered CARE participants.

2.1.2.5 Discuss how the elements above were used to derive the utility's CARE participation rates by energy source.

The participation rate by energy source is the total number of participating CARE customers by energy source divided by the estimated eligible CARE population by energy source. Since SDG&E provides electricity to all customers, but only provides natural gas to customers in San Diego County, and does not provide gas in southern Orange County, the number of participation rates, referred to as penetration rates in the annual and monthly report tables, are derived from electric service only.

2.1.3 Provide the estimates of current demographic CARE-eligibility rates by energy source at year-end.

Electric	24.5%
Gas	24.1%

2.1.4 Provide the estimates of current CARE-eligible sub-metered tenants of master-meter customers by energy source at year-end.

Electric	15,573
Gas	9,193

At year-end 2020, there were 35,163 residential electric sub-metered accounts and 27,475 residential gas sub-metered accounts in SDG&E's service territory. Utilizing the methodology described in Section 2.1.2.3 – 2.1.2.5 above, it is estimated that 44% (or 15,573) of the electric residential sub-metered tenants and 33% (or 9,193) of the residential gas sub-metered tenants are eligible for the CARE Program.

2.1.5 Provide the current CARE sub-metered tenant counts by energy source at year-end.

Electric	11,653
Gas	10,170

2.1.6 Provide the current CARE sub-metered penetration rates by energy source at year-end.

Electric	75%
Gas	111%

2.1.7 Discuss any problems encountered during the reporting period administering the CARE Program for sub-metered tenants and/or master-meter customers.

There were no problems encountered during the reporting period for sub-metered tenants and master-meter customers.

2.2 CARE Program Summary

2.2.1 Please provide CARE Program summary costs.

CARE Budget Categories	2020 Authorized Budget	2020 Actual Expenses	% of Budget Spent
Outreach	$ 3,254,171	$ 2,585,404	79%
Processing, Certification and Recertification	$ 584,809	$ 584,809	100%
Post Enrollment Verification	$ 363,667	$ 141,364	39%
Information Tech./Programming	$ 1,487,000	$ 738,543	50%
Pilots	$ 267,733	$ 228,253	85%
Measurement and Evaluation	$ 0	$ 0	0
Regulatory Compliance	$ 437,376	$ 437,376	100%
General Administration	$ 836,246	$ 675,163	81%
CPUC Energy Division Staff	$ 89,431	$ 89,431	100%
Cool Centers[77]	$ 0	$ 0	0%
Total Expenses	**$ 7,320,433**	**$ 5,480,343**	**75%**
Subsidies and Benefits	$ 122,423,531	$ 139,614,300	114%
Total Program Costs and Discounts	**$ 129,743,964**	**$ 145,094,643**	**112%**

2.2.2 Please provide the CARE Program penetration rate to date.

CARE Penetration			
Participants Enrolled	Eligible Participants	Penetration rate	Target Met?
338,573	302,245	112%	Yes

2.2.3 Report the number of customer complaints received (formal or informal, however and wherever received) about their CARE re-certification efforts, and the nature of the complaints.

In 2020, there were two CARE recertification complaints received by SDG&E on February 5 and February 18, which was prior to the implementation of the COVID-19 Emergency Customer Protections, as discussed previously. One customer claimed to have

[77] SDG&E's General Rate Case was approved by the Commission (D.19-09-051) in September 2019 which removed the funding for the Cool Centers under the CARE program to SDG&E's Operating and Maintenance effective 1/1/2019.

submitted recertification, but SDG&E did not have any record of receiving documents from the customer. SDG&E aided the customer in recertifying online, re-enrolled the customer, and provided a one-time courtesy CARE discount rebill to retroactively provide the discount. The second customer disputed removal from the CARE program because the customer claimed they did not receive any notices from SDG&E. SDG&E verified that the notifications were sent to the customer at the mailing address on the account and in accordance with program procedures. Subsequently, the customer enrolled in the program and is a CARE participant.

2.3 CARE Program Costs

2.3.1 Discount Cost

2.3.1.1 State the average monthly CARE discount received, in dollars, per CARE customer by energy source.

Average Monthly Electric Discount	$ 31.93
Average Monthly Gas Discount	$ 4.23

2.3.1.2 State the annual subsidy (discount) for all CARE customers by energy source.

Electric Subsidy	$ 123,202,068
Gas Subsidy	$ 16,412,232

2.3.1.3 Provide the Number and Percent of Green Tariff Shared Renewables (GTSR) and Enhanced Community Renewables customer base. Also provide the average total bill discount.

In 2020, there were a total of 549 customers on the Green Tariff component of Green Tariff Shared Renewables (GTSR). The average total effective CARE discount at year-end was 35%. SDG&E did not provide the percentage based on the "distribution" portion of the bill because the discount is not based on the distribution portion. New residential EcoChoice customers saved approximately $0.006 kWh by participating in EcoChoice at the 100% subscription level. The average residential customer using 500 kWh per month saved roughly $3.03 per month.

2.3.2 Administrative Cost

2.3.2.1 Show the CARE Residential Program's administrative cost by category.

Category	Total
Outreach	$ 2,585,404
Processing, Certification, Recertification	$ 584,809
Post Enrollment Verification	$ 141,364
IT Programming	$ 738,543
Cool Centers*(See note in Table 2.2.1 above)	$ 0
Pilots	$ 228,253
Measurement & Evaluation	$ 0
Regulatory Compliance	$ 437,376
General Administration	$ 675,163
CPUC Energy Division	$ 89,431
Total Program Costs*(See note in Table 2.2.1 above)	$ 5,480,343

2.3.2.2 Explain what is included in each administrative cost category.

Outreach

Costs include those related to printing and mailing CARE applications and documents, postage, bill inserts, brochures and flyers, advertising, targeted direct mail, telephone campaigns, outreach staff labor, and CBOs.

Processing, Certification and Recertification

Costs in this category include staff labor related to processing applications and customer contact center activities, including, but not limited to, the following:

- Scanning and indexing applications;
- Processing CARE applications;
- Initiating and responding to customer inquiries regarding CARE applications/program;
- Fielding telephone calls related to CARE Program participation; and
- Resolving disputes related to CARE Program enrollment.

Post Enrollment Verification (PEV)

Costs in this category include staff labor related to CARE PEV processing and other costs including, but not limited to, the following:

- Processing CARE income verification and CARE High Usage Verification;
- Responding to customer inquiries regarding CARE income verification documents; and
- Resolving customer issues related to income verification.

Information Technology (IT) /Programming

Costs include IT system support related to maintenance of program systems such as: staff and contractor labor, CARE documents, Interactive Voice Recognition (IVR) system, system reports, data exchanges, and costs associated with system enhancements to comply with Commission mandates and improving operational efficiencies.

Pilots

Costs include those associated with contractor administration of the CHANGES Program.

Cool Centers/Cool Zones

In September 2019, SDG&E's General Rate Case was approved by the Commission in D.19-09-051 and included funding for the Cool Centers in SDG&E's Operating and Maintenance budget, effective January 1, 2019. Accordingly, the Cool Centers are no longer funded through the CARE program. For reference, Cool Zone costs include those associated with the development and printing of Cool Zone collateral pieces including translation, labor for the staff at Aging and Independence Services, oscillating electric fans, printing for Cool Zone hand

fans, and shipping fees for electric fans delivered to customers who are unable to get to a cool zone.[78]

Measurement and Evaluation

Costs include studies associated with the CARE Program.

Regulatory Compliance

Costs include staff labor and non-labor costs related to the preparation of various regulatory filings, including program applications, advice letter filings, audits, regulatory reports, comments, tariff revisions, attendance at working groups and joint utility meetings, public input meetings, and other Commission hearings or meetings. In addition, costs include program funding directed by the Commission to be included in this category.

General Administration

Costs include, but are not limited to, the following: office supplies, facilities, training and development, market research, and staff labor associated with program management and day-to-day operations.

Commission Energy Division Staff Funding

Costs incurred by the Commission's Energy Division staff in support of the Commission's authorized low-income program.[79]

2.3.3 Provide the year-end December 31 balance for the CARE balancing account.

Electric CARE	$ 15,281,618 Under-collected
Gas CARE	$ 4,099,331 Under-collected

[78] *See* A.14-11-007, *SDG&E's 2019 Cool Zone Report Pursuant to Ordering Paragraph 83 of Decision 12-08-044* (December 19, 2018).
[79] D.00-02-045 directs the utilities to fund up to 10 civil servant positions for the EE and Low-Income programs. OP 9 allocates these costs 15% to SDG&E, 25% to SoCalGas, 30% to SCE, and 30% to PG&E. OP 10 further directs that each IOU allocate respective low-Income costs 70% to CARE and 30% to LIEE (now known as ESA).

2.3.4 Describe which cost categories are recorded to the CARE balancing account and which are included in base rates.

The general cost categories recorded to the CARE gas and electric balancing accounts include the CARE discount and the program specific administrative expenses as described above in Section 2.3.2.2. There are no costs related to the discount charged in base rates.

2.3.5 Provide a table showing, by customer class, the CARE surcharge paid, the average bill paid, the percentage of CARE surcharge paid relative to the average bill, the total CARE surcharge collected, and the percentage of total CARE revenues paid.

Please see CARE Table 10 in the Appendix H of this report.

2.4 Outreach

2.4.1 Discuss utility outreach activities and those undertaken by third parties on the utility's behalf including Lifeline coordination.

The CARE Program continued to be the leading offer of SDG&E's customer assistance marketing campaign, which sought to connect with low-income customers across a diverse population including hard-to-reach customers, seniors, customers with special needs, and multilingual/multicultural customers. The campaign drove eligible customers to apply for CARE, and through SDG&E's coordinated efforts, CARE enrollments were automatically converted into ESA Program leads unless the customer requested to opt-out. In 2020, the Customer Assistance Programs campaign included print, streaming TV, radio, outdoor, digital media, bill inserts, ethnic marketing, email, and direct mail with examples provided in Appendix A-G of this report. This was in addition to live calls, outreach through SDG&E's Energy Solutions Partner Network, and CARE Capitation Agencies that help enroll customers in the CARE Program. Due to the COVID-19 pandemic, outreach in 2020 was heavily reliant on virtual activities in order to continue program engagement with partners and customers.

Mass Media

Mass media allowed SDG&E to educate and connect with its customers through diversified communication mediums designed to reach a mass audience and hard-to-reach populations including customers in rural areas, seniors, customers with special needs and multilingual/multicultural customers. It served to drive overall awareness and complement other outreach tactics. In 2020, mass media components included print, streaming TV, streaming radio, outdoor, general market TV, digital media, bill inserts, ethnic marketing, email, and direct mail.

Print Campaigns

SDG&E continued to run print advertising in ethnic (African American, Asian, Hispanic) and rural (back country) publications. Samples of print campaign materials are included in Appendix C of this report.

General Market & Streaming TV

In 2020, SDG&E ran a TV commercial campaign through both general market and streaming TV media. The 15-second spots ran in general market television on Cable (including: ABC, CBS, NBC, FOX, CW and KUSI) and on streaming (on-demand) TV (including: Hulu (NBC), Fox.com, ABC.com, CW.com). SDG&E also ran spots for Hispanic streaming TV stations such as Telemundo and Televisa. Streaming TV is very flexible and allows SDG&E to target customer segments more deeply and optimize performance throughout the campaign. Additionally, through streaming TV, viewers cannot fast forward through the commercials. SDG&E ran three English and two Spanish versions of its TV commercial campaign throughout most of the year. SDG&E also updated our TV spot script to address the COVID-19 pandemic by offering information not just on CARE, but other programs such as LIHEAP and payment

arrangements. These ran in rotation with our normal CARE TV spots. Additionally, SDG&E ran a COVID TV spot letting customers know we're all in this together and we have programs that can help, including the CARE program. Examples of the TV spots are included in Appendix A of this report.

Digital

SDG&E used an integrated online strategy to increase awareness and drive online submissions by using paid search, display ads, and pre-roll video ads. SDG&E digital ads were seen over 53 million times (impressions) throughout the year with over 400,000 customers clicking through to the CARE/ESA Program online application.

Bill Inserts

The annual CARE bilingual notification took place in July 2020. SDG&E also did a double-sided, bilingual bill insert promoting the CARE and ESA Programs in March 2020. All non-CARE customers who indicate a preference for paper bills received the bilingual application in their SDG&E bill, while paperless bill customers were provided a link to view their monthly bill inserts.

Ethnic Marketing

SDG&E reached numerous ethnic segments throughout the year with a variety of mass media tactics. Hispanic, African American, Chinese, Vietnamese, and Filipino audiences were targeted by print. SDG&E continued to target Hispanic audiences via Spanish television and digital campaigns, but also introduced Spanish radio to complement Spanish television efforts. The total spend for these ethnic media campaigns was $265,567, which is detailed below in the following tables:

CARE/ESA
2020 Ethnic Media Recap

Ethnic Print		
Audience	**Readership**	**Total Spend**
Spanish	3,460,860	$35,446
Chinese	140,000	$4,900
Vietnamese	105,000	$1,750
Filipino	1,312,500	$13,860
African American	900,000	$13,207
Totals	**5,918,360**	**$69,163**

Ethnic Television		
Audience	**Impressions**	**Total Spend**
Spanish	1,678,000	$87,498

Ethnic Radio		
Audience	**Impressions**	**Total Spend**
Spanish	1,448,002	$13,750

Ethnic Digital		
Audience	**Impressions**	**Total Spend**
Spanish	11,141,679	$95,156

Total 2020 Ethnic Spend	$265,567

Email Campaigns

In 2020, SDG&E continued the strategy of using the nurture campaign model. The nurture campaigns send a series of pre-written, automated emails, to customers based on their reaction to an initial email. This allows SDG&E to provide more customized messaging in automated follow-up emails. The actions that determine the messaging are:

- Opened an email;
- Did not open an email;
- Clicked on a link within an email;

- Visited a webpage; or
- Clicked on a link within a webpage.

Customers may receive up to five messages (including reminders) over a 30-day period, depending on engagement level. This type of campaign can eliminate redundant messages or over-marketing and increase customer engagement to help bring them closer to conversion.

In 2020, SDG&E continued to use email creative that shows non-CARE customer potential bill savings if they applied for and qualified for CARE. SDG&E showed the customer amounts paid on their energy bill over the last 12 months in comparison to what the customer would have paid on CARE and highlighted the savings.

The campaigns contained integrated messaging and directed customers to the online application. Throughout the campaign, subject lines and content were modified based on customer behavior. Unique open rates, defined as how many people opened the email, were as high as 40%, indicating the subject lines were compelling to customers. By comparison, the utility industry standard open rates hover around 15%. On average, SDG&E typically maintains a 30-35% open rate with all emails. SDG&E averaged a click-through rate of 4%. A sample of the creative can be found in Appendix D of this report.

Direct Mail Campaigns

SDG&E used Athens Research and SDG&E segmentation to geographically target SDG&E customers by identifying areas with mid-high propensity for program participation. SDG&E conducted 18 direct mail campaigns in 2020 (12 for CARE and 6 for ESA). Due to the COVID-19 pandemic and ESA Program suspension, SDG&E halted ESA direct mail efforts for 6 months. For 2020, SDG&E sent a letter showing customers what they would have saved if they were on CARE as described above. The letter encouraged recipients to call SDG&E's toll-free enrollment number or to apply through SDG&E's online application. SDG&E's Direct Mail

campaign was sent to 141,478 customers and contributed to 36,549 enrollments in CARE. A sample of the Direct Mail message from these campaigns can be found in Appendix E of this report.

Lifeline Collaboration

SDG&E continued to include information on Lifeline and provided the Lifeline toll-free phone number in the CARE acceptance letter and on SDGE.com within the Low-Income Assistance section of the website. The enhancement to SDG&E's website provides a resource for customers seeking telephone bill assistance which can benefit customers. Additionally, SDG&E included information about Lifeline through Organic Social Media posts and in a monthly newsletter sent out to CBOs.

CHANGES Program

As previously discussed, the CHANGES program is a statewide program administered by a Commission selected third party lead contractor. The lead contractor selects and subcontracts with CBOs who act as utility liaisons for limited English proficient customers with utility inquiries and issues. In SDG&E's service territory these CBOs are the Alliance for African Assistance, Deaf Community Services of San Diego, and Casa Familiar. The CBOs target specific communities and offer other programs that are meant to complement SDG&E's services. The lists of CBOs in SDG&E's service territory were shared with SDG&E's internal Call Center and outreach team. The IOUs and CHANGES teams met regularly in 2020 to discuss program effectiveness.

Door-to-Door

In 2020, door-to-door campaigns were not conducted.

Live Call Campaign

The Harris Group (THG) utilized the data analysis from the CARE prospect list and continued an outbound call campaign to reach out to potentially eligible customers who live in SDG&E's service territory. THG's outbound call campaign (Live Call Campaign) also included a CARE Recertification Campaign through March 2020.[80] For 2020, the THG Live Call Campaign and CARE Recertification Campaign efforts resulted in over 29,700 completed CARE applications, contributed to over 25,000 new CARE enrollments, and over 2,450 CARE recertifications.

Community Outreach & Engagement

Community outreach allows SDG&E to connect and directly engage customers in energy savings solutions in the communities where they work and live. These outreach activities provide information about SDG&E's CARE Program to potentially eligible customers. SDG&E has established partnerships with social service entities, such as the County of San Diego Health and Human Services Agency (HHSA) and Alliance for African Assistance and Somali Bantu Association of America, to connect with customers who are unaware, concerned, or have a language barrier. SDG&E has also established partnerships with non-profit organizations to deliver presentations, workshops and trainings, and participate at community events to assist SDG&E in securing enrollments through an organization that customers trust. In partnership with HHSA, these efforts resulted in approximately 2,400 CARE applications, 1,000 CARE enrollments, and 400 CARE recertifications.

---

[80] *See*, SDG&E Advice Letter 3516-E-D/2854-G-D to implement applicable customer protections identified in D.19-07-015. For the CARE Program, these include freezing all CARE eligibility reviews, including recertifications, Post Enrollment Verification(PEV) and High Energy Usage (HEU) verifications; the freeze included the removal of customers with pending requests and went in to effect retroactively on March 4, 2020.

CARE Capitation Agencies

SDG&E partners with 18 social service agencies such as the Women, Infants and Children (WIC) program, refugee assimilation organizations, 2-1-1 San Diego, and others to help enroll hard-to-reach customers. These organizations serve vulnerable, 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 located in diverse, low-income communities and serve multicultural/multilingual, seniors, veterans, special needs, and limited English proficient (LEP) audiences and provide multilingual staffing. These partners contributed to over 4,100 CARE applications, over 2,550 CARE enrollments, and over 800 CARE recertifications.[81]

Energy Solutions Partner Network

In 2020, SDG&E continued to work with an established network of more than 190 non-profits and CBOs, collectively called the Energy Solutions Partner Network. A majority of these organizations are small, grassroots agencies serving customers that also reach multicultural/multilingual, seniors, veterans, special needs, and LEP audiences. These partners help educate and enroll customers in low-income programs utilizing a variety of tactics including messaging through 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 2020, over 1,900 activities were coordinated through this partner network to promote the CARE and ESA Programs. Of these activities, CARE and ESA Programs were promoted in over 1,400 social media messages – Facebook, Twitter, and

[81] Since March 4, 2020, no customers are required to recertify, and SDG&E has not removed any customers from the CARE program resulting from recertification. Customers can manually request to recertify but are automatically placed in COVID protection category.

Instagram – by SDG&E's Energy Solutions Partner network reaching over 2,818,000 impressions. The Energy Solutions Partner Network's activities were able to bring in over 500 completed CARE applications, over 225 CARE enrollments, and over 125 CARE recertifications.[82]

Community Events & Presentations

Every year, SDG&E participates in hundreds of community events and presentations throughout its service area. Many of the Energy Solutions Partners host community events that offer social services such as: health and wellness fairs, community resource fairs, food banks, police and fire department open houses, employer fairs, and cultural fairs, as well as educational/STEM activities through schools and communities. SDG&E believes these are excellent opportunities for the Company to participate, since the events often attract low-income and fixed-income audiences. These events are for families with children, seniors, and disabled or special needs populations. These community events also service SDG&E's rural, tribal, and harder to reach populations. Due to the COVID-19 pandemic, most of the 2020 events were canceled or reformatted to a virtual presentation or drive-through format. While these events and presentations may not bring in large numbers of program enrollments, they serve a greater need of educating and engaging customers. In 2020, SDG&E promoted CARE and other customer assistance solutions in over 275 presentations and events, reaching over 40,000 people.

Branch Offices and Customer Contact Center

SDG&E's outreach team collaborates with the branch offices and bill payment locations to aid in educating customers on programs and services during impacted times of the year, such

[82] Since March 4, 2020, no customers are required to recertify, and SDG&E has not removed any customers from the CARE program resulting from recertification. Customers can manually request to recertify but are automatically placed in COVID protection category.

as summer months where customers may experience higher bills. In 2020, however, branch offices were closed to customer interaction because of COVID-19. The branch offices still accepted applications during this time from customers who dropped off the required forms. In 2020, the branch offices received over 1,400 CARE applications, resulting in over 1,000 CARE enrollments and over 100 CARE recertifications.[83]

SDG&E's Customer Contact Center also assists thousands of customers with a variety of energy inquiries each year. Customers are provided with information about the CARE and ESA Programs in both English and Spanish, while waiting to speak with an Energy Service Specialist (ESS) via the Interactive Voice Recognition (IVR) System over the phone. An ESS offers the CARE Program and completes customer enrollments both over the phone and online for those customers who qualify. In 2020, the Customer Contact Center completed over 300 CARE applications, contributed to over 225 CARE enrollments and over 25 CARE recertifications.[84]

2.4.1.1 Discuss outreach to CARE customers for the Home Energy Report, including percentage participation.

In 2020, approximately 816,000 customers received a Home Energy Report in both print and email formats. Of those customers, approximately 328,327 were enrolled in CARE representing 40% of the customer who received a Home Energy Report and accounts for 96% of all customers enrolled in CARE. The reports include a similar homes comparison module that allows recipients to see how their consumption compares to homes of the same general size within their area. Additionally, the reports educate customers on their energy consumption, provide energy saving tips and, when applicable, encourage enrollment in CARE for those not

[83] Since March 4, 2020, no customers are required to recertify, and SDG&E has not removed any customers from the CARE program resulting from recertification. Customers can manually request to recertify but are automatically placed in COVID protection category.
[84] *Id.*

already participating. Approximately 1,185 CARE customers are earning points and rewards on the Home Energy Report platform and more than 63,000 CARE customers are signed up to receive emailed energy efficiency alerts to help them proactively manage their usage during their current billing cycle.

The program also launched bill forecast alerts for electric-only customers to proactively learn about current usage and take immediate action to reduce their use. Additionally, the program launched a Target Rank Experience allowing recipients a view of their rankings among similar homes.

2.4.2 Discuss the most effective outreach method, including a discussion of how success is measured.

SDG&E continues to look for the most effective ways to communicate to customers. As stated in Section 2.4.1, in 2020, SDG&E utilized several different outreach methods to enroll eligible CARE customers. The effectiveness of each outreach method is measured differently depending on the method. Some outreach methods may be measured on open rates, number of impressions, number of customers educated and informed of the program, and number of customers enrolled. Of the different outreach methods, it is hard to define which one was the most effective because it can take several marketing impressions before a customer takes action. However, if outreach effectiveness is based on the number of CARE enrollments and the conversion rate, the most successful and effective method was the "Live CARE Call Campaign" administered by THG. This campaign resulted in over 29,716 submitted CARE applications and enrolled over 25,078 new CARE customers and resulted in over 2,454 CARE recertifications for 2020 resulting in a 93% conversion rate. To measure the success of some outreach methods, SDG&E provides each CARE partner, contractor, and activity a unique source code number that

they submit with each CARE application. This allows SDG&E to track each CARE application, CARE recertification, and CARE enrollment by source.

2.4.3 Discuss barriers to participation encountered during the reporting period and steps taken to mitigate them.

SDG&E's CARE Program continues to face barriers for program participation and must constantly evaluate and sometimes shift its focus to determine ways to counteract these challenges. In 2020, to gain a better understanding of these barriers from the customer perspective, the program surveyed a total of 403 program participants. The survey results revealed that most participants remain satisfied with the CARE Program (90%) and expect to continue participating. The surveys also provided the following insights:

- Online applications have increased dramatically compared to 2018 and 2019 and now surpass other methods. Over half (54%) completed the CARE application online in 2020, compared to 28% in 2019 and 34% in 2018;
- Nearly all participants (95%) continue to find CARE enrollment easy to understand and participate;
- Participant preferences for eligibility verification and renewal have also shifted to electronic methods in 2020. SDG&E plans to offer additional electronic methods such as short message service (SMS) or text messaging;
- Incidence of experiencing one or more adverse economic events has dramatically increased in 2020 to 71% of participants, likely due to effects from the COVID-19 pandemic;
- Email and SDG&E website are the leading sources of total awareness for the CARE Program; and
- One-third of participants made suggestions for improving the CARE Program, significantly more than in 2019. The top suggestion for improving the CARE Program is larger discounts in the monthly energy bill.

2.4.4 Discuss how customer data CARE and other relevant program information is shared by the utility with other utilities sharing its service territory.

SDG&E has a two-way sharing of data for customers in Orange County who are served by both SoCalGas and SDG&E. In 2020, SDG&E received 409 enrollments through this effort. In addition, SDG&E shares CARE customer data with California American Water (CalAm) and Lifeline to assist in identifying customers for their customer assistance programs. In 2020, SDG&E provided 55,379 leads in March, 55,707 leads in September, and 56,352 leads in November to CalAm. SDG&E also provided 271,780 leads in January and 309,901 leads in July to Lifeline.

2.4.5 Discuss how CARE customer data and other relevant program information is shared within the utility, for example, between its Energy Savings Assistance Program and other appropriate low-income programs.

Once an eligible online enrollment or recertification for the CARE Program is received, the CARE System automatically sends an ESA lead to the Energy Efficiency Collaboration Platform (EECP) system if the customer is determined to be eligible based on the prior treated date or unless the customer requests to opt-out. Upon an eligible income verification for the CARE Program, an ESA lead is automatically created stating "CARE Income Certified," letting the outreach agency know they do not need to perform the income eligibility process for this customer. In turn, the EECP system sends the CARE System ESA eligibility information once an ESA enrollment is received. The CARE System determines if the customer will be auto-enrolled, income certified, or recertified in the CARE System based on their current CARE status. This automation has increased the number of qualified leads and CARE enrollments, as well as reduced the number of letters sent for CARE recertification and PEV.

2.4.6 Describe the efforts taken to reach and coordinate the CARE Program with other related low-income programs to reach eligible customers.

SDG&E partners with CBOs and social service providers throughout San Diego and this continues to be an effective form of enrolling customers into the CARE, FERA, and ESA Programs. These organizations are involved daily with customers that meet the Commission's income or categorical qualifications and provide a one stop source for resources. Some of these organizations are WIC, CalFresh, LIHEAP, Covered California, and California Lifeline. Other partners include the CARE Partner Program with social service agencies and 2-1-1 San Diego, and leveraging the efforts of LIHEAP contractors. These programs were leveraged through presentations, events, workshops, and customized partner network messaging.

2.4.6.1 Track Costs of AB 793 related Energy Management Technologies programs (Identify all of the programs or initiatives that will be able to benefit from the availability of the end-use and electric usage profiles, and to coordinate with the relevant proceedings so that the relevant costs can be considered in those proceedings' cost-effectiveness decision-making).

See Section 1.3.4 above.

2.4.7 Describe the process for cross-referral of low-income customers between the utility and CSD. Describe how the utility's CARE customer discount information is provided to CSD for inclusion in its federal funds leveraging application. (Note: These agreements are limited to sharing 1-800 phone numbers with customers and providing CARE benefit information for the federal fiscal year, October 1 of the current year through September 30 of the subsequent year. There are no tracking mechanisms in place to determine how many customers contact the other programs or actually become enrolled in other program(s) as a result of these agreements.)

SDG&E continues to find value in leveraging with partners such as CSD. This partnership demonstrates SDG&E's commitment to utilize every feasible effort to reach out to customers in need. SDG&E promotes the CSD's LIHEAP bill payment assistance and

weatherization services programs, and also includes CSD LIHEAP's phone number on SDG&E's CARE applications and program materials so customers have direct contact information to access services. SDG&E's Customer Assistance staff also informs customers about services offered by CSD and refers customers to CSD for additional bill assistance through LIHEAP. Lastly, SDG&E's agreement with 2-1-1 San Diego requires part of the customer screening to include referral to LIHEAP agencies such as CUI and MAAC, as appropriate. In 2020, 2-1-1 San Diego handled approximately 72,000 utility-related calls and referred 17,332 of those to LIHEAP agencies.

2.4.8 Discuss any recommendations to improve cost-effectiveness, processing of applications, or program delivery. Discuss methods investigated or implemented by the utility or third parties under contract to the utility to improve outreach and enrollment services to non-participating households in the prior year. Provide cost-effectiveness assessments, if available.

At the end of 2019 and throughout 2020, SDG&E worked with its Information Technology department and a third party vendor to monitor post-click tracking from SDG&E's email and digital ads all the way through application submission. This involved developing a post-click tracking solution for two tagging systems that weren't completely compatible. In 2020, the first full year of post-click conversion measurement, SDG&E's digital advertising drove the submission of 19,744 applications representing a 400% increase over the final months of 2019. This data was key in providing insight on how to adjust and optimize digital campaigns to more efficiently and effectively garner conversions and applications.

Due to the COVID-19 pandemic, outreach partners began utilizing SDG&E's CARE online portal to assist with customer enrollments. The use of the CARE online portal reduced the amount of paper applications submitted by outreach partners and allowed for faster customer program enrollment.

In SDG&E's 2020 CARE customer satisfaction survey, many CARE program participants expressed interest in customized recommendations for managing home energy usage and costs. Accordingly, SDG&E plans to explore ways to increase the promotion of its home energy usage tools to CARE participants in 2021. The customer satisfaction survey also determined that more program participants prefer electronic methods of communication. SDG&E plans to expand its electronic methods of communication to include text messaging in 2021, and explore mobile app integration for CARE program eligibility requirements.

System improvements and enhancements were limited in 2020 due to the implementation of SDGE's new Customer Information System (CIS) scheduled to launch in 2021, which is expected to increase efficiencies and other improvements for processing of applications and program delivery in 2021.

Furthermore, SDG&E plans to transition the current fulfillment vendor to its in-house fulfillment operations in 2021. The transition will allow for additional efficiencies, easier management of postage mail notices to program participants, and cost savings.

2.5 Processing CARE Applications

2.5.1 Describe the utility's process for recertifying sub-metered tenants of master-meter customers.

In general, tenants of sub-metered facilities follow similar recertification guidelines as individually metered dwellings. Sub-metered tenants are provided with a two-year recertification period with the exception of fixed income tenants, who are required to recertify every four years. Once sub-metered tenants are due to recertify, they are provided with a mailed

renewal request. If no response is received within 30 days, SDG&E will mail a second request to the tenants prior to removal.[85]

2.5.2 Describe any contracts the utility has with third parties to conduct certification, re-certification and/or verification on the utility's behalf. Describe how these third-party efforts compare to the utility's efforts in comparable customer segments, such as hard-to-reach or under-served. Include comparisons of effectiveness and cost-effectiveness of comparable customer segments, if available.

SDG&E finds that collaboration with third party contractors is a necessary component to successfully reach and enroll hard-to-reach and under-served customers. In 2020, SDG&E partnered with third parties to conduct certification and recertification of CARE customers on the utility's behalf. As previously discussed, SDG&E contracted with THG to conduct a Live Call Campaign and CARE Recertification Campaign, resulting in 25,078 CARE enrollments and 2,454 recertifications.[86] SDG&E also partnered with 2-1-1 San Diego, a 24-hour resource and information center connecting residents with community, health, and disaster services. Customers often contact 2-1-1 San Diego in an emergency to locate important resources including bill assistance programs, food, and shelter. The 2-1-1 San Diego partnership resulted in over 2,300 CARE enrollments and over 360 CARE recertifications.

Additional SDG&E ME&O activities are detailed in Section 2.4.1. These activities include mass media, print campaigns, streaming TV, digital, bill inserts, ethnic marketing, email campaigns, direct mail campaigns, community outreach and engagement, CARE partners, Energy Solutions Partner Network, community events and presentations, customer contact centers, and branch offices. SDG&E measures the effectiveness of this program in two ways.

---

[85] Since March 4, 2020, no customers are required to recertify, and SDG&E has not removed any customers from the CARE program resulting from recertification. Customers can manually request to recertify but are automatically placed in COVID protection category.
[86] *Id.*

The first measure of success is generating overall program education and awareness through mass media and community outreach tactics. The second is customer engagement to generate and measure enrollments. For these harder-to-reach and underserved audiences, it is important to utilize multiple tactics as stated above. It is difficult to evaluate cost-effectiveness per tactic, given that some of these tactics cannot be directly sourced to the actual customer enrollment and/or that the customer may experience multiple tactics prior to completing recertification as detailed in Section 2.4.2. This is especially true for mass media tactics like television, print, and online advertisements. In 2020, SDG&E's online advertising garnered over 53 million impressions (the number of times an SDG&E ad was seen by an on-line user) while ethnic print advertising had a readership of over 5 million and ethnic television garnered over 1.7 million impressions. All mass media channels encouraged customers to call SDG&E's toll-free number or visit SDG&E's website to complete an online application. It is challenging to determine how many impressions it took for customers who enrolled through the toll-free and online application process. However, as a general marketing principle, it may take 10 or more touches before a consumer takes action and responds to a tactic.

2.6 Program Management

2.6.1 Discuss issues and/or events that significantly affected program management in the reporting period and how these were addressed.

In accordance with Commission Resolution M-4842, Emergency Authorization and Order Directing Utilities to Implement Emergency Customer Protections to Support California Customers During the COVID-19 pandemic, SDG&E discontinued generating all recertification and verification requests that require CARE customers to provide their current income information, discontinued all high-usage reviews, and suspended all CARE program removals to avoid unintentional loss of the discounted rate during the period for which the customer is

protected. Further details on the implementation of the emergency disaster relief program for COVID-19 can be found under SDG&E Advice Letter 3516-E-D/2854-G-D.

2.7 Pilots

There were no pilots in 2020.

2.8 Studies

See Section 1.10 above for a description of the LINA study.

2.9 CARE Restructuring Working Group

In D.19-09-004, the Commission concluded that CARE would not be restructured at that time. In 2020, there were no activities relative to the CARE Rate Restructuring effort.

2.10 Miscellaneous: Describe coordination efforts with the California Advanced Services Fund's new Broadband Public Housing Account.

In 2020, there were no coordination efforts with the California Advanced Services Fund new broadband public housing account.

3. CARE EXPANSION PROGRAM

3.1 Participant Information

3.1.1 Provide the total number of residential and/or commercial facilities by month, by energy source for the reporting period.

2020	Commercial		Residential	
Month	Electric	Gas	Electric	Gas
Jan	185	115	441	229
Feb	185	115	436	229
Mar	185	115	431	226
Apr	181	114	436	238
May	180	114	442	241
Jun	180	113	446	237
Jul	184	113	447	240
Aug	183	113	451	240
Sep	185	113	465	233
Oct	185	114	469	233
Nov	185	116	467	230
Dec	185	115	465	224

3.1.1.1 State the total number of residents (excluding caregivers) for residential facilities, and for commercial facilities, by energy source, at year-end.

Facility Type	Electric	Gas
Commercial	6,602	3,952
Residential	1,444	744

3.2 Usage Information

3.2.1 Provide the average monthly usage by energy source per residential facility and per commercial facility.

Commodity	Residential	Commercial
Gas	37	509
Electric	520	10,358

3.3 Program Cost

3.3.1 Administrative Cost (Show the CARE Expansion Program's administrative cost by category).

In 2020, SDG&E's Expanded CARE Program costs where related to labor associated with processing new enrollments and recertifications. The Expanded CARE Program costs totaled $6,970. Expanded CARE Program costs associated with recertification were prior to the implementation of the emergency disaster relief program for COVID-19 at which point the IOUs suspended all CARE program recertification notices through April 16, 2021.[87]

3.3.1.1 Discount Information

3.3.1.2 State the average annual CARE discount received per residential facility by energy source.

Residential Facility Gas Discount	$ 162
Residential Facility Electric Discount	$ 606

3.3.1.3 State the average annual CARE discount received per commercial facility by energy source.

Commercial Facility Gas Discount	$ 893
Commercial Facility Electric Discount	$ 4,606

3.4 Outreach

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

SDG&E has skilled and knowledgeable Energy Solutions Advisors that promote programs such as Expanded CARE with partners who manage multifamily low-income housing. The SDG&E Advisor team also promotes Expanded CARE through general outreach activities. The Advisors work with SDG&E's CBOs, Energy Solutions Partner Network, Community Relations Advisors, and Account Executives to deliver presentations, host booths at community

[87] Subsequently, the Commission extended the customer protections to June 30, 2021 in Resolution M-4849 issued on February 11, 2021.

events, and send e-updates including newsletters and social media posts. Due to the COVID-19 pandemic, many of the outreach activities were presented virtually in 2020.

Discuss each of the following:

3.4.1.1 Discuss the most effective outreach method including a discussion of how success is measured.

Historically, the most effective outreach method to promote Expanded CARE is through SDG&E's skilled and knowledgeable customer facing team, consisting of assigned Account Executives and Energy Solutions Advisors. These groups work directly with customers who may be eligible for Expanded CARE and with CBO's who work directly with potentially eligible clients.

3.4.1.2 Discuss how the CARE facility data and relevant program information is shared by the utility with other utilities sharing service territory.

The shared territory between SDG&E and SoCalGas is in Southern Orange County. The two utilities share relevant program information on Expanded CARE facilities as needed.

3.4.1.3 Discuss barriers to participation encountered in the prior year and steps taken to mitigate these, if feasible, or not, if infeasible.

The barrier to participation for Expanded CARE tends to come from the ability for these facilities to meet the guidelines – specifically 100% resident eligibility and non-profit status of the organization. SDG&E's Outreach team continues to promote Expanded CARE to eligible customers through general outreach activities and through the Energy Solutions Partner Network. Due to the COVID-19 pandemic, many of the outreach activities were presented virtually.

3.4.2 Discuss any recommendations to improve the cost-effectiveness, processing of applications, or program delivery. Discuss methods investigated or implemented by the utility or third parties on the utility's behalf to improve outreach and enrollment services to non-

participating facilities in the prior year. Provide cost-effectiveness assessments, if available.

SDG&E did not implement any system enhancements in 2020 relative to the Expanded CARE Program.

3.5 Program Management

3.5.1 Discuss issues and/or events that significantly affected program management in the reporting period and how these were addressed.

In accordance with Commission Resolution M-4842, Emergency Authorization and Order Directing Utilities to Implement Emergency Customer Protections to Support California Customers During the COVID-19 pandemic, SDG&E discontinued generating all recertification and verification requests that require CARE customers to provide their current income information, discontinued all high-usage reviews, and suspended all CARE program removals to avoid unintentional loss of the discounted rate during the period for which the customer is protected. Further details on the implementation of emergency disaster relief program for COVID-19 can be found under SDG&E Advice Letter 3516-E-D/2854-G-D.

4. FUND SHIFTING

4.1 Report Energy Savings Assistance Program fund shifting activity that falls within rules laid out in Section 20.1 of D. 08-11-031 as modified by D.10-10-008, 16-11-022, and D.17-12-009.

In 2020, SDG&E did not shift ESA Program funds.

4.1.1 Report CARE fund shifting activity that falls within rules laid out in Section 20.1 of D. 08-11-031 as modified by D.10-10-008, D.16-11-022, and D.17-12-009.

During 2020, SDG&E shifted CARE funds in accordance with the rules set forth in D.08-11-031, as modified by D.10-10-008, D.16-11-022, and D.17-12-009, which granted the IOUs authority to shift funds between CARE Program categories. SDG&E leveraged excess funds in the IT Programming category to shift a total of $232,900 to cover overages in the Processing, Certification, and Recertification, Regulatory Compliance, and CPUC Energy Division categories.

4.1.2 Was there any Energy Savings Assistance Program or CARE fund shifting activity that occurred that falls OUTSIDE the rules laid out in Section 20.1 of D. 08-11-031 as modified by D.10-10-008, D.16-11-022, and D.17-12-009?

There was no ESA Program or CARE Program fund shifting activity that occurred that falls outside of the rules laid out in the Section 20.1 of D.08-11-031, as modified by D.10-10-008, D.16-11-022, and D.17-12-009.

5. COMMONLY USED ACRONYMS

CAM	Common Area Measures
CARE	California Alternate Rates for Energy
CBO	Community-Based Organization
CFL	Compact Fluorescent Lamp
COVID-19	Coronavirus Disease 2019
CPUC	California Public Utilities Commission
CSI	California Solar Initiative
D.	Decision
CSD	California Department of Community Services & Development
DDTP	Deaf and Disabled Telecommunications Program
DRP	Demand Response Program
DSM	Demand Side Management
EE	Energy Efficiency
ESA	Energy Savings Assistance
EECP	Energy Efficiency Collaboration Platform
FERA	Family Electric Rate Assistance
HEAT	Home Energy Assistance Tracking
HEU	High Energy Users
IHD	In Home Display
IOU	Investor-Owned Utilities
kW	Kilowatt
kWh	Kilowatt Hour
LIEE	Low Income Energy Efficiency
LIHEAP	Low Income Home Energy Assistance Program
LINA	Low Income Needs Assessment
MFEER	Multifamily Energy Efficiency Rebate
MIDI	Middle Income Direct Install
MOU	Memorandum of Understanding
mW	Megawatt
mWh	Megawatt Hour
NEBs	Non-Energy Benefits
NGAT	Natural Gas Appliance Testing
NMEC	Normalized Metered Energy Consumption
OP	Ordering Paragraph
PCT	Programmable Communicating Thermostat
PEV	Post Enrollment Verification
PFM	Petition for Modification
PG&E	Pacific Gas and Electric Company
PPP	Public Purpose Program
PY	Program Year
SASH	Single Family Affordable Homes
SCE	Southern California Edison Company
SDG&E	San Diego Gas & Electric Company
SoCalGas	Southern California Gas Company
SOMAH	Solar on Multifamily Affordable Housing

SPOC	Single Point of Contact
SSI	Supplemental Security Income
SSD	Supplemental Security Disability
SSP	Social Security Pension
TDD	Telecommunications Device for the Deaf
TOU	Time of Use
TRC	Total Resource Cost Test
UC	Utility Costs
WET	Workforce, Education, and Training
3MM	Three measure minimum

Appendix A - CARE TV Examples

CARE TV Spot :30 Seconds English - https://www.youtube.com/watch?v=tWGPkiZUCCw

CARE TV Spot :30 Seconds Spanish - https://www.youtube.com/watch?v=Rje2qPxh4HE

CARE-COVID TV Spot :30 Seconds English - https://www.youtube.com/watch?v=Gk7lV-TmZQw

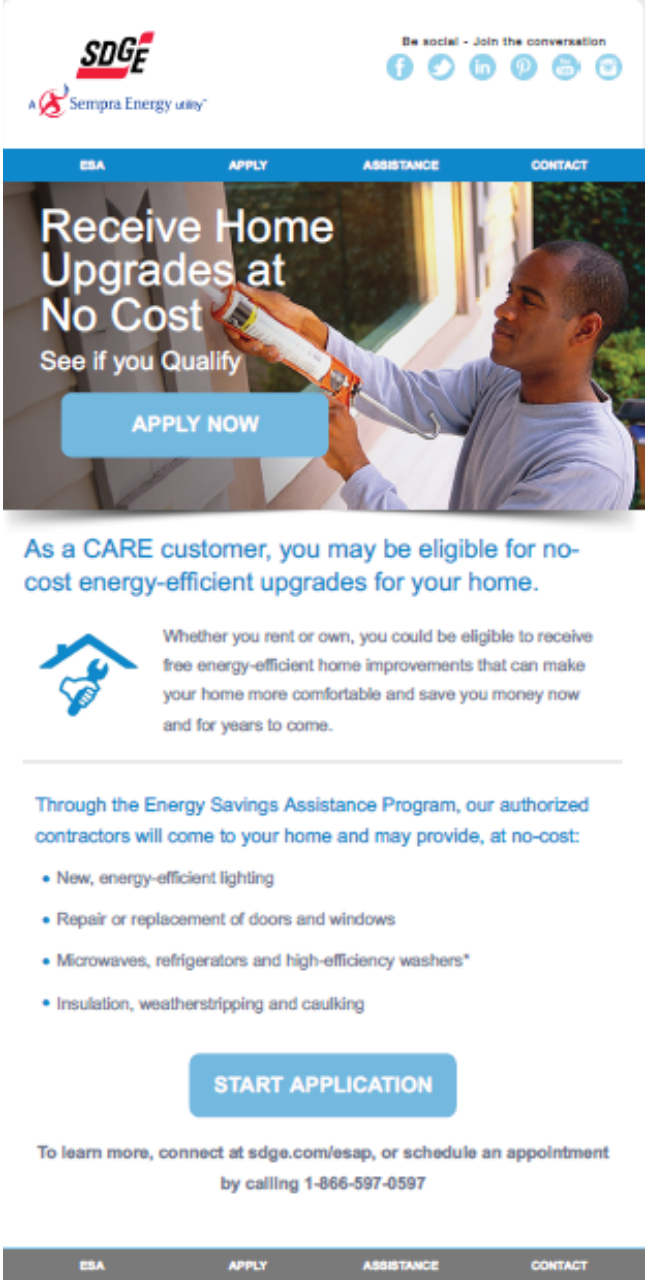
CARE-COVID TV Spot :30 Seconds Spanish - https://www.youtube.com/watch?v=nMMAzXNocN0

COVID TV Spot :30 Seconds English - https://www.youtube.com/watch?v=0wwzBAk3BzE

COVID TV Spot :30 Seconds Spanish - https://www.youtube.com/watch?v=doelSYDO6ZI

Appendix B - ESA Email and Direct Mail Example

2020 ESA Email Example



2020 ESA Direct Mail Example

Get no-cost home improvements that can help lower your SDG&E® bill

Save and enjoy a more comfortable home!

If you qualify, our authorized contractors will come to your home and may provide:

- New home appliances*
- Repair or replacement of doors
- Insulation, weatherstripping and caulking to lower heating and cooling costs
- Energy-efficient lighting

To see if you qualify

call **1-866-597-0597**

or visit **sdge.com/esap**

Energy Savings Assistance Program

*Existing appliances must meet age requirements to qualify for replacement.

This program is funded by California utility customers and administered by San Diego Gas & Electric® under the auspices of the California Public Utilities Commission. Energy improvements completed under this program are made by third party providers contracted by SDG&E. SDG&E is not responsible for any goods and services selected by customers.

© 2019 San Diego Gas & Electric Company. All copyright and trademark rights reserved.

Appendix C - CARE & ESA Print

English Print Ad #1

English Print Ad #2

For many San Diegans, meeting everyday needs isn't easy. SDG&E offers financial assistance to those that need it most. See if you qualify for these money-saving benefits:

- 30% or more off your monthly energy bill
- Free home energy improvements whether you rent or own
- Energy-saving appliances at no cost

Apply today at ***sdge.com/assistance***

SDGE

A Sempra Energy utility

High energy use could result in removal from the program.

These programs are funded by California utility customers and administered by San Diego Gas & Electric under the auspices of the California Public Utilities Commission.

©2020 San Diego Gas & Electric Company. Trademarks are the property of their respective owners. All rights reserved.

Follow us on:

English Print Ad #3

For many San Diegans, meeting everyday needs isn't easy. SDG&E offers financial assistance to those that need it most. See if you qualify for these money-saving benefits:

- 30% or more off your monthly energy bill
- Free home energy improvements whether you rent or own
- Energy-saving appliances at no cost

Apply today at ***sdge.com/assistance***

SDGE

A Sempra Energy utility

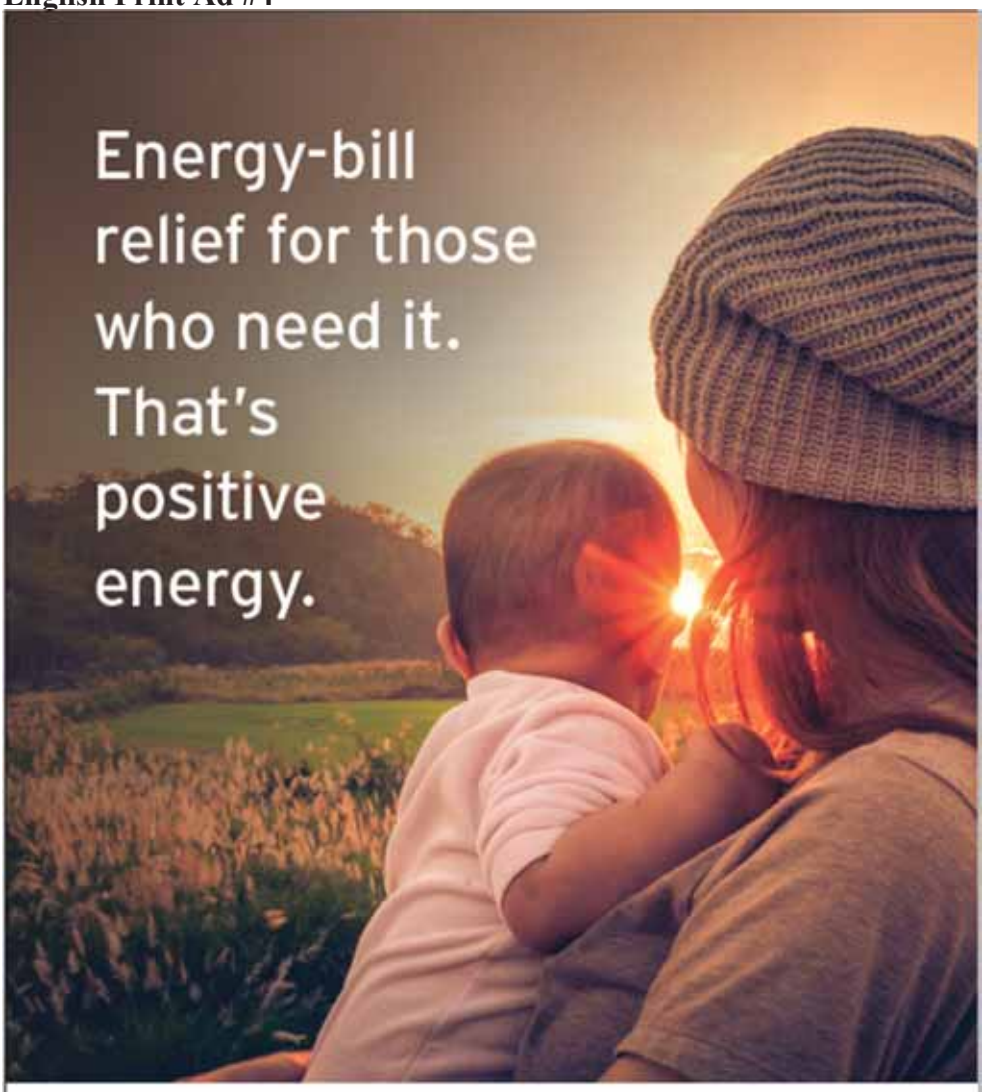
High energy use could result in removal from the program.

These programs are funded by California utility customers and administered by San Diego Gas & Electric under the auspices of the California Public Utilities Commission.

©2020 San Diego Gas & Electric Company. Trademarks are the property of their respective owners. All rights reserved.

Follow us on:

English Print Ad #4



If you have recently lost your job, even if you are receiving unemployment benefits, SDG&E® offers assistance programs that can help you save 30% or more on your monthly energy bill. See if you qualify.

Apply today at ***sdge.com/assistance***

SDGE

A Sempra Energy utility

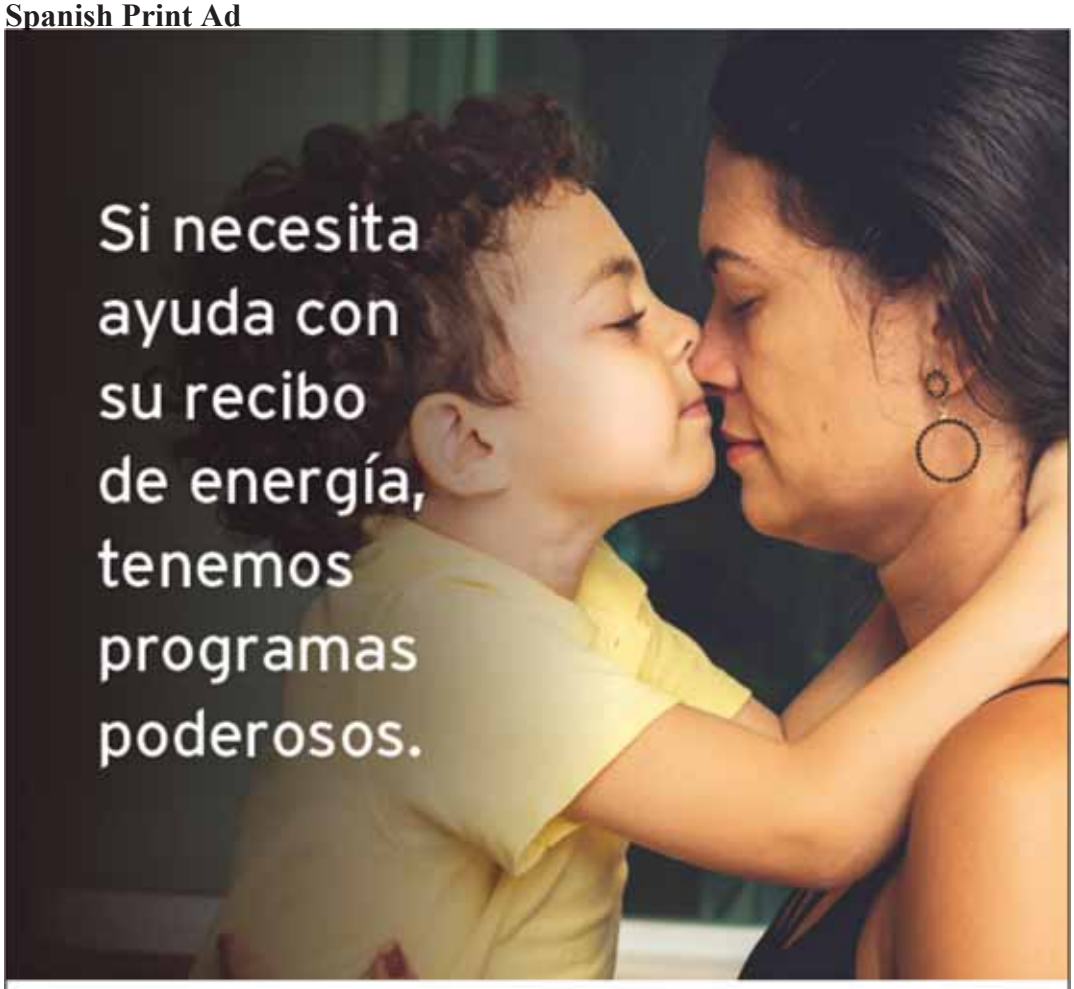
High energy use could result in removal from the program.

These programs are funded by California utility customers and administered by San Diego Gas & Electric under the auspices of the California Public Utilities Commission.

©2020 San Diego Gas & Electric Company. Trademarks are the property of their respective owners. All rights reserved.

Follow us on:

Spanish Print Ad



Para muchos sandieguinos, satisfacer necesidades diarias no es fácil. Es por eso que SDG&E® ayuda asistencia a quienes más lo necesitan. Vea si califica para estos beneficios de ahorro:

- 30% o más en su recibo mensual de energía
- Mejoras energéticas gratuitas para su hogar, ya sea inquilino o propietario
- Electrodomésticos de ahorro de energía sin costo alguno

Inscríbase hoy en ***sdge.com/asistencia***

SDGE
A Sempra Energy utility

Un consumo elevado de energía podría resultar en que se le retire del programa.

Este programa está financiado por los clientes de las empresas de servicios públicos de California y administrado por San Diego Gas & Electric®, bajo los auspicios de la Comisión de Servicios Públicos de California.

©2020 San Diego Gas & Electric Company. Las marcas comerciales son propiedad de sus respectivos propietarios. Todos los derechos reservados.

Síganos en

Chinese Print Ad

对许多圣地亚哥人来说，应付日常需求并不容易。这就是为什么 SDG&E® 要提供能帮助您降低能源账单的各项协助计划。请来看看您是否符合资格获得这些帮助省钱的优惠：

- 每月能源账单减 30% 或更多
- 无论您是租客还是屋主都可享用的免费住家节能修缮
- 免费的节能家用电器

请今天就来 sdge.com/assistance 申请

SDGE

Sempra Energy utility

Vietnamese Print Ad

Đối với nhiều cư dân San Diego, việc đáp ứng nhu cầu hàng ngày không dễ dàng. Đó là lý do tại sao SDG&E® cung cấp các chương trình hỗ trợ có thể giúp giảm hóa đơn năng lượng của quý vị. Hãy xem nếu quý vị đủ điều kiện cho các lợi ích tiết kiệm tiền bạc này:

- Giảm 30% hoặc nhiều hơn hóa đơn năng lượng hàng tháng của quý vị
- Cải thiện năng lượng tại nhà miễn phí cho dù quý vị thuê hay sở hữu
- Thiết bị tiết kiệm năng lượng miễn phí

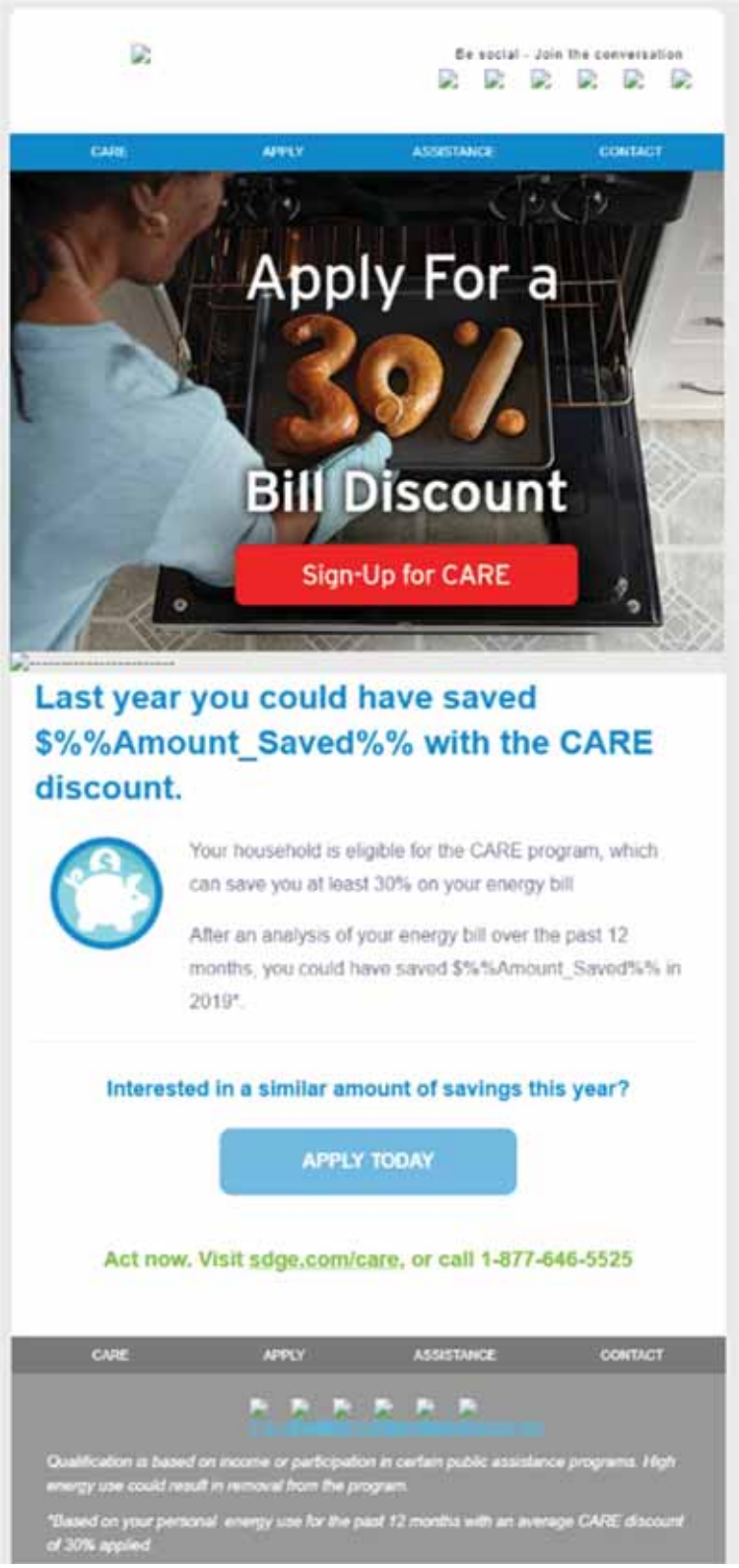
Nộp đơn ngày hôm nay tại ***sdge.com/assistance***

SDGE

A Sempra Energy utility

Appendix D - 2020 CARE Email Example

2020 CARE Email Example



Appendix E - 2020 CARE Direct Mail Example

2020 CARE Direct Mail Example

SDGE

A Sempra Energy utility*

How much could you have saved on your energy bill?

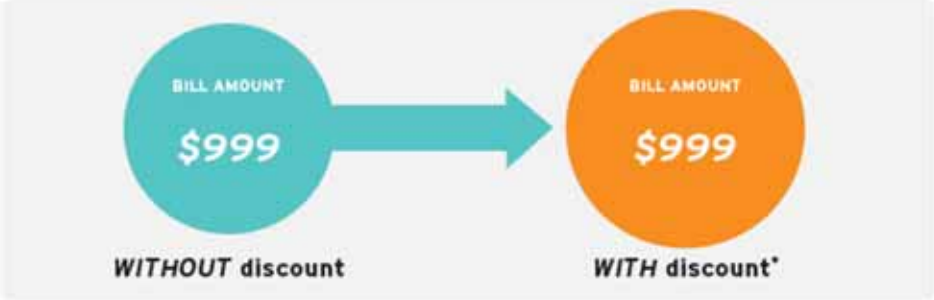
September 24, 2020

Stephen Moyer
8326 Century Park Ct # CP62B
San Diego, CA 92123-1530

Account number: 9999999999

Dear **Stephen Moyer,**

You may qualify to save 30% or more on your energy bill. Here's how much you could have saved over the last 12 months on your energy use at **8326 Century Park Court.**



Based on 9,999 kilowatt hours over the last 12 months

Based on your energy use over the last 12 months, you could have saved approximately **$999*** on your bill. Get your savings now. Sign up at ***sdge.com/care*** or call **1-877-646-5525** to see if you qualify.

Sincerely,

Pedro Ramirez
Customer Assistance Programs

Qualification is based on income or participation in certain public assistance programs.
High energy use could result in removal from the program.

*Based on your personal energy use over the last 12 months with an average CARE discount of 30% applied.

013568

Appendix F - 2020 CARE Outdoor Example

2020 CARE Outdoor Example

Appendix G - 2020 CARE Radio Example

:30 Radio Copy

Many in our community have lost their jobs and need help. There are programs available for everyday expenses like utility bills, even if you've never qualified before. Federal grants can pay up to $1,000 through the Low-Income Home Energy Assistance Program. Or get a discount of 30% or more on monthly energy bills through the CARE program. To see if you qualify, go to 2-1-1 sdge.org or sdge.com slash assistance.

Appendix H - ESA Program and CARE Program Tables

Appendix H: ESA Program and CARE Program Tables

Summary Table – ESA Program and CARE Program

ESA Program – Table 1 – Overall Program Expenses

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

ESA Program – Table 2 – Expenses & Energy Savings by Measures Installed

ESA Program – Table 2A - Expenses & Energy Savings by Measures Installed: CSD Leveraging

ESA Program – Table 2B - Expenses & Energy Savings by Measures Installed: MF Common Area

ESA Program – Table 3 – Cost Effectiveness

ESA Program – Table 4 – Detail By Housing Type and Source

ESA Program – Table 5 – Direct Purchases & Installation Contractors

ESA Program – Table 6 – Installation Cost of Program Installation Contractors

ESA Program – Table 7 – Expenditures by Cost Elements

ESA Program – Table 8 – Homes Unwilling/Unable to Participate

ESA Program – Table 9 – Life Cycle Bill Savings by Measure

ESA Program – Table 10 – Energy Rate Used for Bill Savings Calculations

ESA Program – Table 11 – Bill Savings Calculations by Program Year

ESA Program – Table 12 – Fund Shifting

ESA Program – Table 13 – Categorical Enrollment

ESA Program – Table 14 – Leveraging and Integration

ESA Program – Table 15 – Lighting

ESA Program – Table 16 – “Add Back” Measures

ESA Program – Table 17 – Expenditures for Pilots and Studies

ESA Program – Table 18 – Miscellaneous (2nd Refrig, Education Only, A/C Cycling, etc.)

ESA Program – Table 19 – Contractor Advanced Funding and Repayment

CARE Program – Table 1 – CARE Overall Program Expenses

CARE Program – Table 2 – CARE Enrollment, Re-certification, 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 – Re-certification Results

CARE Program – Table 7 – Capitation Contractors

CARE Program – Table 8 – Participants per Month

CARE Program – Table 9 – Average Monthly Usage & Bill

CARE Program – Table 10 – CARE Surcharge & Revenue

CARE Program – Table 11 – CARE Capitation Applications

CARE Program – Table 12 – CARE Expansion Program

CARE Program – Table 13 – CARE High Usage Verification Results

CARE Program – Table 13A – CARE Customer Usage and ESA Program Treatment

CARE Program – Table 14 – CARE Categorical Enrollment

SDG&E 2020 Energy Savings Assistance Program Annual Report

Energy Savings Assistance Program
And
California Alternate Rates for Energy Program

SDG&E 2020 Summary Highlights

ESA Program

2020 Energy Savings Assistance Program Summary			
2020	**Authorized / Planning Assumptions**	**Actual**	**%**
Budget	$31,008,648	$13,528,673	44%
Funded from 2009-2016 Unspent Funds **	$4,500,505	$1,711,739	38%
Summary Homes Treated	23,761	11,679	49%
Summary kWh Saved	7,220,000	1,216,885	17%
Summary kW Demand Reduced	3,954	163	4%
Summary Therms Saved	420,000	40,271	10%
First Touches Homes Treated *	243	5,308	2184%
- kWh Saved	N/A	604,522	NA
- kW Demand Reduced	N/A	81	NA
- Therms Saved	N/A	17,288	NA
Go-Backs/Retreated Homes *	23,518	6,371	27%
- kWh Saved	N/A	612,362	NA
- kW Demand Reduced	N/A	81	NA
- Therms Saved	N/A	22,983	NA
Multifamily Common Area Measures Properties Treated **	45	57	127%
- kWh Saved	1,184,499	777,366	66%
- kW Demand Reduced	496	152	31%
- Therms Saved	55,129	5,686	10%

* SDG&E's authorized forecast included the total number of homes treated for first touches versus go-backs/retreatments; measures and savings were not included in the forecast.

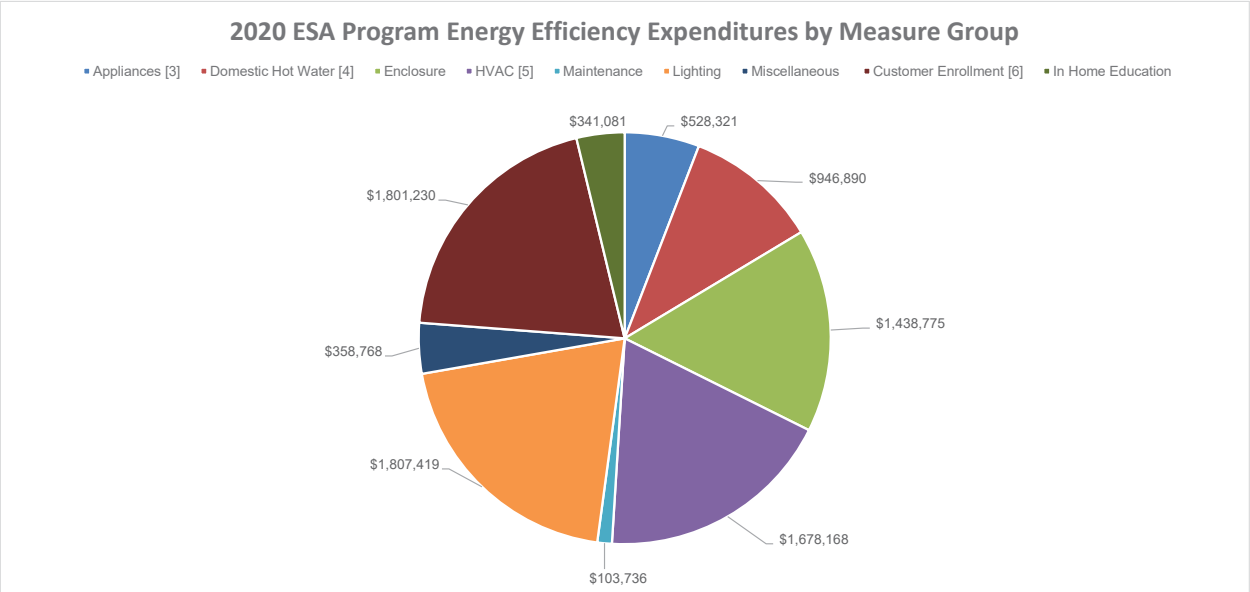
Note: The authorized budget and values shown for planning assumptions are from SDG&E Advice Letter 3065-E-A/2568-G-A approved by Commission Resolution E-4884 on December 14, 2017 and SDG&E Advice Letter 3250-E/2688-G approved by Commission on December 27, 2018.

** Funding for Multifamily Common Area Measures in the amount of $3,535,000 is included.

CARE Program

2020 CARE Program Summary			
2020	**Authorized Budget**	**Actual**	**%**
Administrative Expenses	$ 7,320,433	$ 5,480,343	75%
Subsidies	$ 122,423,531	$ 139,614,300	114%
Service Establishment Charge	$ -	$ -	n/a
Total Program Costs and Discounts	**$ 129,743,964**	**$ 145,094,643**	112%
2020 CARE New Enrollments	**Automatically Enrolled via Data Sharing, ESA Participation, etc**	**Self Certified as Income or Categorically Eligible**	**Self Certified as Recertification**
Method	1,257	75,839	32,749
2020 CARE Penetration	**Estimated Eligible Participants**	**Participants**	**Penetration Rate**
Total Enrolled	302,245	338,573	112%

Data in pie below includes costs for measure end use reflected in ESA Tables 1.



	A	B	C	D	E	F	G	H	I	J
1	**SDG&E PY 2020 Energy Savings Assistance Program Annual Report** **ESAP Table 1** **ESAP Overall Program Expenses**									
2		**2020 Authorized Budget [1] [2]**			**2020 Annual Expenses**			**% of Budget Spent**		
3	**ESA Program:**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**
4	**Energy Efficiency**									
5	Appliances [3]	$ 854,260	$ 319,825	$ 1,174,085	$ 395,882	$ 132,439	$ 528,321	46%	41%	45%
6	Domestic Hot Water [4]	$ 65,958	$ 2,132,630	$ 2,198,588	$ 28,407	$ 918,483	$ 946,890	43%	43%	43%
7	Enclosure	$ 2,560,350	$ 3,393,952	$ 5,954,302	$ 618,673	$ 820,102	$ 1,438,775	24%	24%	24%
8	HVAC [5]	$ 427,358	$ 3,727,353	$ 4,154,711	$ 179,081	$ 1,499,087	$ 1,678,168	42%	40%	40%
9	Maintenance	$ 7,063	$ 291,617	$ 298,680	$ -	$ 103,736	$ 103,736	0%	36%	35%
10	Lighting	$ 4,642,829	$ -	$ 4,642,829	$ 1,807,419	$ -	$ 1,807,419	39%	0%	39%
11	Miscellaneous	$ 1,775,159	$ -	$ 1,775,159	$ 358,768	$ -	$ 358,768	20%	0%	20%
12	Customer Enrollment [6]	$ 2,195,740	$ 2,195,740	$ 4,391,481	$ 900,615	$ 900,615	$ 1,801,230	41%	41%	41%
13	In Home Education	$ 348,433	$ 348,433	$ 696,865	$ 170,540	$ 170,540	$ 341,081	49%	49%	49%
14	Contractor Advance Funds			$ -	$ 453,911	$ 453,911	$ 907,821	0%	0%	0%
15	Pilot			$ -	$ -	$ -	$ -	0%	0%	0%
16	Fund Shift Offset			$ -	$ -	$ -	$ -	0%	0%	0%
17	Multi-Family Common Area			$ -	$ -	$ -	$ -	0%	0%	0%
18	**Energy Efficiency TOTAL [7]**	**$ 12,877,149**	**$ 12,409,550**	**$ 25,286,700**	**$ 4,913,297**	**$ 4,998,913**	**$ 9,912,210**	**38%**	**40%**	**39%**
19										
20	Training Center	$ 249,089	$ 249,089	$ 498,179	$ 6,301	$ 6,301	$ 12,601	3%	3%	3%
21	Inspections	$ 90,210	$ 90,210	$ 180,420	$ 79,913	$ 79,913	$ 159,826	89%	89%	89%
22	Marketing and Outreach	$ 600,000	$ 600,000	$ 1,200,000	$ 586,992	$ 586,991	$ 1,173,983	98%	98%	98%
23	Statewide Marketing Education and Outreach	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
24	Measurement and Evaluation Studies	$ 17,083	$ 17,083	$ 34,166	$ -	$ -	$ -	0%	0%	0%
25	Regulatory Compliance	$ 168,266	$ 168,266	$ 336,532	$ 136,667	$ 136,666	$ 273,333	81%	81%	81%
26	General Administration	$ 1,368,601	$ 1,368,601	$ 2,737,202	$ 979,198	$ 979,197	$ 1,958,394	72%	72%	72%
27	CPUC Energy Division	$ 23,877	$ 23,877	$ 47,754	$ 19,164	$ 19,164	$ 38,327	80%	80%	80%
28	Reallocation (ME&O budget reduced from $1.2M)	$ 343,848	$ 343,848	$ 687,695	$ -	$ -	$ -	0%	0%	0%
29										
30	**TOTAL PROGRAM COSTS**	**$ 15,738,123**	**$ 15,270,524**	**$ 31,008,648**	**$ 6,721,530**	**$ 6,807,143**	**$ 13,528,673**	**43%**	**45%**	**44%**
31				**Funded Outside of ESA Program Budget**						
32	Indirect Costs				$ 485,725	$ 481,621	$ 967,346			
33	NGAT Costs		$ 288,000	**$ 288,000**		$ 103,149	$ 103,149		36%	36%
34										
35	[1] Reflects authorized budget in SDG&E Advice Letter 3065-E-A/2568-G-A approved by Commission Resolution E-4884 on December 14, 2017 and SDG&E Advice Letter 3250-E/2688-G approved by Commission on December 27, 2018.									
36	[2] The authorized budget does not include shifted funds from previous year and/or program cycle, and/or 2009-2016 program years. Shifted funds, if any, are reflected in ESA Table 12.									
37	[3] Subcategory includes $24,055 of San Diego County Water Authority (SDCWA) reimbursements not included in Table 2.									
38	[4] Subcategory includes $130,610 of San Diego County Water Authority (SDCWA) reimbursements not included in Table 2.									
39	[5] The "2020 Annual Expenses-Electric" (cell E8) and "2020 Annual Expenses-Gas" (cell F8) may be inaccurate. However, the "2020 Annual Expenses-Total" (cell G8) is correct. SDG&E has identified a system issue that resulted in HVAC measures being classified to incorrect HVAC subcategories. The total discrepancy amount is $8,239. Thus, there are $8,239 of expenses where it is unclear what the expense allocation should be between gas and electric. SDG&E was unable to reconcile the discrepancy prior to the Annual Report deadline; however, the total reported expenses reflect the correct total.									
40	[6] Subcategory includes $31,487 invoice for Leads not included in Table 2.									
41	[7] Adjusted to reflect 2020 contractor activity, net of accruals.									
42										
43										

	A	B	C	D	E	F	G	H	I	J
1	**SDG&E PY 2020 Energy Savings Assistance Program Annual Report** **ESAP Table 1A** **Expenses Funded from 2009-2016 Unspent Program Funds**									
2		**2020 Authorized Budget [1] [2]**			**2020 Annual Expenses**			**% of Budget Spent**		
3	**ESA Program:**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**
4	**Energy Efficiency**									
5										
6	Multi-Family Common Area Measures	$ 1,767,500	$ 1,767,500	$ 3,535,000	$ 869,069	$ 786,614	$ 1,655,683	49%	45%	47%
7	In Home Education	$ 185,912	$ 185,912	$ 371,824	$ -	$ -	$ -	0%	0%	0%
8	Leveraging - CSD	$ 241,216	$ 241,216	$ 482,431	$ -	$ -	$ -	0%	0%	0%
9	Pilot	$ 25,000	$ 25,000	$ 50,000	$ 17,081	$ 17,081	$ 34,162	68%	68%	68%
10	Measurement and Evaluation Studies	$ 30,625	$ 30,625	$ 61,250	$ 10,947	$ 10,947	$ 21,893	36%	36%	36%
11	Regulatory Compliance	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
12	General Administration	$ -	$ -	$ -	$ -	$ -	$ -	0%	0%	0%
13										
14	**TOTAL UNSPENT PROGRAM COSTS**	**$ 2,250,253**	**$ 2,250,253**	**$ 4,500,505**	**$ 897,097**	**$ 814,642**	**$ 1,711,739**	**40%**	**36%**	**38%**
15										
16										
17	[1] Reflects authorized budget in SDG&E Advice Letter 3065-E-A/2568-G-A approved by Commission Resolution E-4884 on December 14, 2017 and SDG&E Advice Letter 3250-E/2688-G approved by Commission on December 27, 2018.									
18	[2] D.16-11-022 specifically directed funding for new initiatives to come from unspent 2009-2016 ESA Program funds, which is reaffirmed in Advice Letter SDG&E 3250-E/2688-G.									
19										
20										

SDG&E 2020 Energy Savings Assistance Program Annual Report

ESAP Table 2

ESAP Expenses and Energy Savings by Measures Installed

	ESA Program (Summary)Total							ESA Program (First Touch Homes Treated)							ESA Program (Re-Treated Homes/Go Backs)							ESA Program (Aliso Canyon - SCG & SCE) [6]						
		Year-To-Date Completed & Expensed Installation							Year-To-Date Completed & Expensed Installation							Year-To-Date Completed & Expensed Installation							Year-To-Date Completed & Expensed Installation					
Measures	Units	Quantity Insta	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 ($)	% of Expenditure	Units	Quantity Installed	kWh[4] (Annual)	kW[4] (Annual)	Therms[4] (Annual)	Expenses ($)	% of Expenditure
Appliances [6]		(K+S)	(L+T)	(M+U)	(N+V)	(O+W)																						
High Efficiency Clothes Washer	Each	133	1,044	0	2,402	$ 127,416	1.4%	Each	43	555	0	755	$ 41,257	1.1%	Each	90	489	0	1,647	$ 86,159	1.6%	Each	-	-	-	-	$ -	0.0%
Refrigerator	Each	463	270,459	32	-	$ 424,960	4.7%	Each	175	105,797	13	-	$ 161,829	4.3%	Each	288	164,662	20	-	$ 263,131	4.9%	Each	-	-	-	-	$ -	0.0%
Microwave	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
Domestic Hot Water [7]																												
Other Domestic Hot Water [5]	Home	5,742	22,488	3	16,649	$ 369,803	4.1%	Home	2,076	10,054	1	5,932	$ 137,460	3.6%	Home	3,666	12,434	2	10,717	$ 232,343	4.4%	Home	-	-	-	-	$ -	0.0%
Water Heater Tank and Pipe Insulation	Home	494	-	-	256	$ 28,519	0.3%	Home	252	-	-	152	$ 14,058	0.4%	Home	242	-	-	104	$ 14,462	0.3%	Home	-	-	-	-	$ -	0.0%
Water Heater Repair/Replacement	Each	1,461	-	-	42,200	$ 672,412	7.4%	Each	660	-	-	18,944	$ 259,344	6.9%	Each	801	-	-	23,256	$ 413,068	7.7%	Each	-	-	-	-	$ -	0.0%
Combined Showerhead/TSV	Each	5	-	-	31	$ 341	0.0%	Each	1	-	-	6	$ 68	0.0%	Each	4	-	-	25	$ 273	0.0%	Each	-	-	-	-	$ -	0.0%
New - Heat Pump Water Heater	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
New - Tub Diverter/ Tub Spout	Each	61	171	0	116	$ 6,425	0.1%	Each	37	171	0	68	3,897	0.1%	Each	24	-	-	48	$ 2,528	0.0%	Each	-	-	-	-	$ -	0.0%
New - Thermostat-controlled Shower Valve	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	-	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
Enclosure																												
Air Sealing [1]	Home	3,941	58,968	12	1,473	$ 1,359,357	14.9%	Home	1,471	30,784	6	625	$ 544,144	14.4%	Home	2,470	28,184	6	848	$ 815,213	15.3%	Home	-	-	-	-	$ -	0.0%
Caulking	Home	-	-	-	-	$ -	0.0%	Home	-	-	-	-	-	0.0%	Home	-	-	-	-	-	0.0%	Home	-	-	-	-	-	0.0%
Attic Insulation	Home	58	4,145	1	1,925	$ 79,418	0.9%	Home	29	2,795	1	1,015	$ 40,283	1.0%	Home	29	1,350	0	910	$ 39,135	0.8%	Home	-	-	-	-	$ -	0.0%
HVAC																												
FAU Standing Pilot Conversion	Each	2	-	-	20	$ 681	0.0%	Each	1	-	-	10	$ 341	0.0%	Each	1	-	-	10	$ 341	0.0%	Each	-	-	-	-	$ -	0.0%
Furnace Repair/Replacement	Each	1,515	-	-	(21,500)	$ 1,474,985	16.2%	Each	620	-	-	(8,794)	$ 558,498	14.8%	Each	895	-	-	(12,706)	$ 916,487	17.1%	Each	-	-	-	-	$ -	0.0%
Room A/C Replacement	Each	116	(5,022)	(1)	-	$ 125,839	1.4%	Each	19	(930)	(0)	-	$ 22,927	0.6%	Each	97	(4,092)	(1)	-	$ 102,912	1.9%	Each	-	-	-	-	$ -	0.0%
Central A/C replacement	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
Heat Pump Replacement	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
Evaporative Cooler (Replacement)	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
Evaporative Cooler (Installation)	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
Duct Test and Seal	Home	227	-	-	1,152	$ 37,793	0.4%	Home	104	-	-	504	$ 17,855	0.5%	Home	123	-	-	648	$ 19,937	0.4%	Home	-	-	-	-	$ -	0.0%
New - Energy Efficient Fan Control	Home	-	-	-	-	$ -	0.0%	Home	-	-	-	-	$ -	0.0%	Home	-	-	-	-	$ -	0.0%	Home	-	-	-	-	$ -	0.0%
New - Prescriptive Duct Sealing	Home	-	-	-	-	$ -	0.0%	Home	-	-	-	-	$ -	0.0%	Home	-	-	-	-	$ -	0.0%	Home	-	-	-	-	$ -	0.0%
New - High Efficiency Forced Air Unit (HE FAU)	Home	-	-	-	-	$ -	0.0%	Home	-	-	-	-	$ -	0.0%	Home	-	-	-	-	$ -	0.0%	Home	-	-	-	-	$ -	0.0%
New - A/C Time Delay	Home	-	-	-	-	$ -	0.0%	Home	-	-	-	-	$ -	0.0%	Home	-	-	-	-	$ -	0.0%	Home	-	-	-	-	$ -	0.0%
New - Smart Thermostat	Home	194	18,700	-	1,255	$ 38,870	0.4%	Home	88	10,755	-	567	$ 17,610	0.5%	Home	106	7,945	-	687	$ 21,260	0.4%	Home	-	-	-	-	$ -	100.0%
Maintenance																												
Furnace Clean and Tune	Home	1,291	-	-	(2,706)	$ 103,736	1.1%	Home	522	-	-	(1,146)	$ 41,840	1.1%	Home	769	-	-	(1,560)	$ 61,895	1.2%	Home	-	-	-	-	$ -	0.0%
Central A/C Tune up	Home	-	-	-	-	$ -	0.0%	Home	-	-	-	-	$ -	0.0%	Home	-	-	-	-	$ -	0.0%	Home	-	-	-	-	$ -	0.0%
Lighting																												
Interior Hard wired LED fixtures	Each	4,252	17,986	2	(327)	$ 356,998	3.9%	Each	1,257	5,317	1	(98)	$ 105,538	2.8%	Each	2,995	12,669	2	(229)	$ 251,460	4.7%	Each	-	-	-	-	$ -	0.0%
Exterior Hard wired LED fixtures	Each	1,475	7,582	1	-	$ 106,125	1.2%	Each	619	3,182	0	-	$ 44,550	1.2%	Each	856	4,400	1	-	$ 61,576	1.2%	Each	-	-	-	-	$ -	0.0%
LED Torchiere	Each	4,141	17,516	2	(315)	$ 381,206	4.2%	Each	1,543	6,527	1	(118)	$ 141,502	3.7%	Each	2,598	10,990	1	(197)	$ 239,704	4.5%	Each	-	-	-	-	$ -	0.0%
Occupancy Sensor	Each	-	-	-	-	$ -	0.0%	Each						0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
LED Night Light	Each	-	-	-	-	$ -	0.0%	Each						0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
New - LED R/BR Lamps	Each	3,973	11,998	1	(201)	$ 64,243	0.7%	Each	2,391	7,221	1	(117)	$ 38,662	1.0%	Each	1,582	4,778	1	(85)	$ 25,581	0.5%	Each	-	-	-	-	$ -	0.0%
New - LED A-Lamps	Each	61,146	129,630	16	(2,159)	$ 898,846	9.8%	Each	31,262	66,275	8	(1,018)	$ 459,551	12.1%	Each	29,884	63,354	8	(1,141)	$ 439,295	8.2%	Each	-	-	-	-	$ -	0.0%
Miscellaneous																												
Pool Pumps	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%	Each	-	-	-	-	$ -	0.0%
Smart Strip	Each	1,691	236,740	33	-	$ 100,237	1.1%	Each	1,086	152,040	21	-	$ 67,690	1.8%	Each	605	84,700	12	-	$ 32,547	0.6%	Each	-	-	-	-	$ -	0.0%
Smart Strip Tier II	Each	3,032	424,480	59	-	$ 258,531	2.8%	Each	1,457	203,980	29	-	$ 130,610	3.5%	Each	1,575	220,500	31	-	$ 127,922	2.4%	Each	-	-	-	-	$ -	0.0%
Pilots																												
		-	-	-	-	$ -																						
Customer Enrollment [8]																												
ESA Outreach & Assessment	Home	11,679	-	-	-	$ 1,769,744	19.4%	Home	5,308				$ 784,844	20.7%	Home	6,371				$ 984,900	18.4%	Home	-				$ -	0.0%
ESA In-Home Energy Education	Home	11,684	-	-	-	$ 341,081	3.7%	Home	5,311				$ 151,438	4.0%	Home	6,373				$ 189,642	3.5%	Home	-				$ -	0.0%
Total Savings/Expenditures			1,216,885	163	40,271	$ 9,127,567				604,522	81	17,288	$ 3,785,797				612,362	81	22,983	$ 5,341,770				-	-	-	$ -	
Total Households Weatherized [2]		3,853							1,432							2,421							-					
Households Treated	Total (K+S)							First Touches							Re-treated Homes/Go-Backs							Aliso Canyon						
- Single Family Households Treated	Home	3,649						Home	2,063						Home	1,586						Home						
- Multi-family Households Treated	Home	6,532						Home	2,540						Home	3,992						Home						
- Mobile Homes Treated	Home	1,498						Home	705						Home	793						Home						
Total Number of Households Treated	Home	11,679						Home	5,308						Home	6,371						Home						
# Eligible Households to be Treated for PY [3]	Home	23,761						Home	243						Home	23,518						Home						
% of Households Treated	%	49%						%	2184%						%	27%						%						
- Master-Meter Households Treated	Home	560						Home	307						Home	253						Home						

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

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

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

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

[4] Savings estimates are sourced from the PY 2015 to 2017 ESA Impact Evaluation; Energy Division instructed the IOUs to use these results for 2019 and 2020 savings estimates.

[5] Other Domestic Hot Water includes the following parts: Faucet Aerator, Low Flow Showerhead, and Thermostatic shower valve

[6] Does not include $24,055 of San Diego County Water Authority (SDCWA) reimbursements included in Table 1

[7] Does not include $130,610 of San Diego County Water Authority (SDCWA) reimbursements included in Table 1.

[8] Does not include $31,487 invoice for Leads not included in Table 1.

	A	B	C	D	E	F	G	H
1	**SDG&E 2020 Energy Savings Assistance Program Annual Report**							
2	**ESAP Table 2A**							
3	**ESAP Expenses and Energy Savings by Measures Installed**							
4								
5			**ESA Program - CSD Leveraging**					
6			**Year-To-Date Completed & Expensed Installation**					
7	**Measures**	**Units**	**Quantity Installed**	**kWh (Annual)**	**kW (Annual)**	**Therms (Annual)**	**Expenses ($)**	**% of Expenditure**
8	**Appliances**							
9	High Efficiency Clothes Washer	Each	-	-	-	-	$ -	0.0%
10	Refrigerators	Each	-	-	-	-	$ -	0.0%
11	Microwaves	Each	-	-	-	-	$ -	0.0%
12	**Domestic Hot Water**							
13	Water Heater Blanket	Home	-	-	-	-	$ -	0.0%
14	Low Flow Shower Head	Home	-	-	-	-	$ -	0.0%
15	Water Heater Pipe Insulation	Home	-	-	-	-	$ -	0.0%
16	Faucet Aerator	Home	-	-	-	-	$ -	0.0%
17	Water Heater Repair/Replacement	Each	-	-	-	-	$ -	0.0%
18	Thermostatic Shower Valve	Each	-	-	-	-	$ -	0.0%
19	New - Combined Showerhead/TSV	Each	-	-	-	-	$ -	0.0%
20	New - Heat Pump Water Heater	Each	-	-	-	-	$ -	0.0%
21	New - Tub Diverter/ Tub Spout	Each	-	-	-	-	$ -	0.0%
22	New - Thermostat-controlled Shower Valve	Each	-	-	-	-	$ -	0.0%
23	**Enclosure**							
24	Air Sealing / Envelope	Home	-	-	-	-	$ -	0.0%
25	Caulking	Home	-	-	-	-	$ -	0.0%
26	Attic Insulation	Home	-	-	-	-	$ -	0.0%
27	**HVAC**							
28	FAU Standing Pilot Conversion	Each	-	-	-	-	$ -	0.0%
29	Furnace Repair/Replacement	Each	-	-	-	-	$ -	0.0%
30	Room A/C Replacement	Each	-	-	-	-	$ -	0.0%
31	Central A/C replacement	Each	-	-	-	-	$ -	0.0%
32	Heat Pump Replacement	Each	-	-	-	-	$ -	0.0%
33	Evaporative Cooler (Replacement)	Each	-	-	-	-	$ -	0.0%
34	Evaporative Cooler (Installation)	Each	-	-	-	-	$ -	0.0%
35	Duct Testing and Sealing	Home	-	-	-	-	$ -	0.0%
36	New - Energy Efficient Fan Control	Home	-	-	-	-	$ -	0.0%
37	New - Prescriptive Duct Sealing	Home	-	-	-	-	$ -	0.0%
38	New - High Efficiency Forced Air Unit (HE FAU)	Home	-	-	-	-	$ -	0.0%
39	New - A/C Time Delay	Home	-	-	-	-	$ -	0.0%
40	**Maintenance**							
41	Furnace Clean and Tune	Home	-	-	-	-	$ -	0.0%
42	Central A/C Tune up	Home	-	-	-	-	$ -	0.0%
43	**Lighting**							
44	Compact Fluorescent Lights (CFL)	Each	-	-	-	-	$ -	0.0%
45	Interior Hard wired CFL fixtures	Each	-	-	-	-	$ -	0.0%
46	Exterior Hard wired CFL fixtures	Each	-	-	-	-	$ -	0.0%
47	Torchiere	Each	-	-	-	-	$ -	0.0%
48	Occupancy Sensor	Each	-	-	-	-	$ -	0.0%
49	LED Night Lights	Each	-	-	-	-	$ -	0.0%
50	New - LED Diffuse Bulb (60W Replacement)	Each	-	-	-	-	$ -	0.0%
51	New - LED Reflector Bulb	Each	-	-	-	-	$ -	0.0%
52	New - LED Reflector Downlight Retrofit Kits	Each	-	-	-	-	$ -	0.0%
53	New - LED A-Lamps	Each	-	-	-	-	$ -	0.0%
54	**Miscellaneous**							
55	Pool Pumps	Each	-	-	-	-	$ -	0.0%
56	Smart Power Strips - Tier 1	Each	-	-	-	-	$ -	0.0%
57	New - Smart Power Strips - Tier 2	Each	-	-	-	-	$ -	0.0%
58	**Pilots**							
59								
60	**Customer Enrollment**							
61	Outreach & Assessment	Home					$ -	0.0%
62	In-Home Education	Home					$ -	0.0%
63								
64	**Total Savings/Expenditures**			-	-	-	$ -	0.0%
65								
66	Total Households Weatherized							
67								
68	**CSD MF Buildings Treated**			**Total**				
69								
70	- Multifamily			0				
71								

SDG&E 2020 Energy Savings Assistance Program Annual Report
ESAP Table 2B
Multifamily Common Area Measures Initiative Expenses and Energy Savings by Measures Installed

Table 2B ESA Program - Multifamily Common Area Measures						
ESA CAM Measures	Units (of Measure such as "each")	Quantity Installed	kWh [1] (Annual)	kW [1] (Annual)	Therms [1] (Annual)	Expenses ($)
Appliances						
Domestic Hot Water						
Central Boiler[2]	Cap-kBTUh	2,805	-	-	8,731	$ 134,707
Faucet Aerator	Each	23	-	0	86	$ 177
Pipe Insulation	Home	3	-	-	26	$ 2,378
Envelope						
HVAC						
AC Tune-up[2]	Cap-Tons	147	2,638	3	27	$ 18,145
Furnace Replacement[2]	Cap-kBTUh	149	-	-	45	$ 4,955
HEAT Pump Split System	Each	27	943	1	(0)	$ 58,464
Programmable Thermostat	Each	4	335	-	19	$ 1,160
Lighting						
Exterior LED Lighting	Fixture	2,122	138,784	-	-	$ 386,542
Exterior LED Lighting - Pool	Lamp	2	3,790	-	-	$ 2,371
Interior LED Exit Sign	Fixture	6	58	0	(0)	$ 783
Interior LED Fixture	Fixture	2,130	394,617	92	(1,126)	$ 246,434
Interior LED Lighting	KiloLumen	905	21,091	5	(188)	$ 95,900
Interior LED Screw-in	Lamp	943	5,234	1	(20)	$ 9,590
Interior TLED Type A Lamps	Lamp	3,876	145,714	35	(1,355)	$ 49,755
Interior TLED Type C Lamps	Lamp	1,402	52,707	13	(505)	$ 38,227
Miscellaneous						
Tier-2 Smart Power Strip	Each	31	4,201	1	(53)	$ 2,989
Variable Speed Pool Pump	Each	3	7,254	1	-	$ 3,948
Ancillary Services						
Audit[4]		51				$ 82,311
Total	-	-	777,366	152	5,686	$ 1,138,836

Multifamily Buildings Treated	Total
-Total Number of Multifamily Properties Treated	57
- Subtotal of Master-metered Multifamily Properties Treated	18
- Total Number of Multifamily Tenant Units w/in Properties Treated	4,736

[1] Savings estimates are sourced from approved workpapers.

[2] 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.

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 requirements of at or below 200% of the Federal Poverty Guidelines.

	A	B	C	D	E	F	G	H	I	J
1	**SDG&E PY 2020 Energy Savings Assistance Program Annual Report** **ESAP Table 3** **Program Cost Effectiveness**									
2										
3										
4	**Program**	**Ratio of Benefits Over Costs**					**Net Benefits $**			
5		**ESACET**	**Resource Test**	**TRC**	**PAC**	**RIM**	**ESACET**	**Resource Test**	**TRC**	
6	**ESA In-Unit**	0.55	0.18	0.10	0.10	0.08	(5,470,927)	(5,335,510)	(10,939,620)	
7	**ESA CAM**	-	-	0.59	0.59	0.31	-	-	(617,750)	
8										
9	Notes:									
10	All program measures, including resource and non-resource measures, are represented in the ESACET. Only measures considered resource measures are represented in the Resource Test. Resource measures, as defined by the ESA Cost Effectiveness Working Group, include any measure with a unit savings of less than one kWh or one therm.									
11	The ESACET includes energy and non-energy benefits and all program costs including measure, installation, and administrative costs.									
12	The Resource Test includes energy benefits and program measure and installation costs.									
13	Energy Division instructed the IOUs to use the results of the PY2015 to 2017 ESA Impact Evaluation for their 2019 and 2020 savings estimates. This does not apply to ESA CAM. ESA CAM savings estimates are based on approved workpapers.									
14	Ordering Paragraph 43 of D.14-08-030 directs the application of the two new cost effectiveness tests, ESACET and Resource TRC (renamed the Resource Test).									
15										

	A	B	C	D	E	F	G
1	**SDG&E PY 2020 Energy Savings Assistance Program Annual Report ESAP Table 4 Detail by Housing Type and Source[1]**						
2							
3			**2020 Energy Savings[5]**				
4	Customer	**Housing Type**	**# Homes Treated**	**(mWh)**	**MW**	**(mTherm)**	**2020 Expenses**
5	**Gas and Electric Customers**						
6	**Owners - Total**		**3,040**	**452.016**	**0.059**	**28.658**	**$ 4,995,268**
7		**Single Family**	1,423	212.969	0.030	(9.755)	$ 2,562,318
8		**Multi Family**	219	21.673	0.003	0.836	$ 195,129
9		**Mobile Homes**	1,398	217.373	0.026	37.578	$ 2,237,822
10	**Renters - Total**		**7,548**	**597.517**	**0.081**	**11.612**	**$ 3,627,397**
11		**Single Family**	1,709	200.766	0.028	4.182	$ 1,295,626
12		**Multi Family**	5,759	384.449	0.052	7.420	$ 2,294,429
13		**Mobile Homes**	80	12.303	0.002	0.010	$ 37,341
14	**Electric Customers (only)**						
15	**Owners - Total**		**346**	**70.346**	**0.009**	**-**	**$ 200,152**
16		**Single Family**	280	57.725	0.008	-	$ 163,829
17		**Multi Family**	52	9.535	0.001	-	$ 29,994
18		**Mobile Homes**	14	3.085	0.000	-	$ 6,330
19	**Renters - Total**		**745**	**97.006**	**0.013**	**-**	**$ 304,749**
20		**Single Family**	237	40.985	0.006	-	$ 112,881
21		**Multi Family**	502	54.112	0.007	-	$ 188,711
22		**Mobile Homes**	6	1.909	0.000	-	$ 3,157
23	**Gas Customers (only)**						
24	**Owners - Total**		**-**	**-**	**-**	**-**	**$ -**
25		**Single Family**	-	-	-	-	$ -
26		**Multi Family**	-	-	-	-	$ -
27		**Mobile Homes**	-	-	-	-	$ -
28	**Renters - Total**		**-**				
29		**Single Family**	-	-	-	-	$ -
30		**Multi Family**	-	-	-	-	$ -
31		**Mobile Homes**	-	-	-	-	$ -
32							
33	**Gas and Electric Total - ESA CAM**						
34	**Multifamily Common Area Bldgs - Total**		57	777.897	0.152	5.684	$ 1,138,836
35							
36	**Totals:**		**11,736**	**1,995**	**0.315**	**46**	**$ 10,266,403**
37							
38							
39	**Penetration History**						
40	**Year**	**Homes Treated[2]**	**Ineligible & Unwilling[3]**	**Estimated Eligible in Current Year[4]**	**Current Year Penetration Rate for Homes Treated**		
41	**2002**	14,089					
42	**2003**	15,706					
43	**2004**	14,897					
44	**2005**	11,254					
45	**2006**	13,771					
46	**2007**	13,074					
47	**2008**	20,804					
48	**2009**	20,927	6,685	20,384	103%		
49	**2010**	21,593	8,690	20,384	106%		
50	**2011**	22,575	8,423	20,384	111%		
51	**2012**	22,415	7,871	20,316	110%		
52	**2013**	17,568	13,411	20,316	86%		
53	**2014**	22,039	15,738	20,316	108%		
54	**2015**	20,209	17,308	20,316	99%		
55	**2016**	19,792	22,570	20,316	97%		
56	**2017**	13,212	30,306	11,563	114%		
57	**2018**	7,785	50,716	11,667	67%		
58	**2019**	10,072	31,415	4,630	218%		
59	**2020**	5,308	7,964	243	2184%		
60	**Total Homes Treated since 2002**	307,090	221,097	190,835			
61							
62	[1] Summary data which includes ESA Program, CSD Leveraging, and MF efforts.						
63	[2] Homes treated since 2002 are reported to track progress toward meeting the 2020 Programmatic Initiative. It includes first touches and CSD leveraging authorized in D.16-11-022 and D.17-12-009. It does not include go-backs/retreatments.						
64	[3] Ineligible & Unwilling defined in ESA Table 8.						
65	[4] For years prior to 2017, this value is based on Attachment F of D.12-08-044 and D.14-08-030. For 2017 and 2018, this is based on the calculation of remaining eligible households as described on 1) pages 5 and 6 of SDG&E's Conforming Advice Letter filed April 3, 2017 and as ordered in Ordering Paragraph 80 of D.17-12-009 (for the 2017 value) and 2) SDG&E's Midcycle Advice Letter filed July 16, 2018 (for the 2018 value).						
66	[5] Savings estimates for ESA treated homes are sourced from the PY 2015 to 2017 ESA Impact Evaluation. Savings for common area measures are sourced from approved workpapers						
67							
68							
69							
70	**Year**	**Utility in Shared Service Territory**	**Eligible Households in Shared Service Territory**	**Eligible Households Treated by Both Utilities in Shared Service Territory**			
71	**2020**	SoCalGas	14,172	274			
72							

SDG&E PY 2020 Energy Savings Assistance Program Annual Report
Amended ESAP Table 5
ESAP Direct Purchases & Installation Contractors

	A	B	C	D	E	F	G
2			Contractor Type				2020 Annual
3	**Contractor**	**County**	**Private**	**CBO**	**WMDVBE**	**LIHEAP**	**Expenditures[1] [2]**
4	American Eco Services, Inc.	San Diego	X		X		$ 1,049,886
5	Campesinos Unidos Inc.	San Diego		X	X	X	$ 598,728
6	Capital State Construction	San Diego	X				$ 406,275
7	~~Eagle Systems International Inc.~~	~~San Diego~~	~~X~~		~~X~~		~~$ 1,226,091~~
8	Eagle Systems International Inc. [3]	San Diego	X				$ 1,226,091
9	Jerry's Heating & Air Conditioning, Inc.	San Diego	X				$ 686,015
10	~~MAAC Project~~	~~San Diego~~		~~X~~	~~X~~	~~X~~	~~$ 526,054~~
11	MAAC Project[3]	San Diego		X		X	$ 526,054
12	R&B Wholesale Distributor	San Diego	X				$ 552,376
13	Reliable Energy Management Inc.	Orange	X		X		$ 159,180
14	Richard Heath & Associates	San Diego	X		X		$ 2,775,159
15	THA Heating and Air Conditioning Inc.	San Diego	X				$ 1,147,803
16	**Total Contractor Expenditures**						**$ 9,127,567**

17
18 [1] Adjusted to reflect 2020 contractor activity, net of accruals.
19 [2] Contractor activity excludes expenses from Pilot and Multi-Family Common Area Measures reflected in ESA Tables 1A, 7 and 12.
20 [3] Contractor inadvertently marked as WMDVBE in the 2019 and 2020 Low Income Annual Reports. The redlined classifications reported herein are the correct
21 classifications for program years 2019 and 2020.
22

SDG&E PY 2020 Energy Savings Assistance Program Annual Report
ESAP Table 6
ESAP Installation Cost of Program Installation Contractors [1], [2]

		CBO/WMDVBE						Non-CBO/WMDVBE						2020 Program Total				
	Unit of Measure	Installations		Dwellings		Costs		Installations		Dwellings		Costs						
		Units	%	Units	%	$	%	Units	%	Units	%	$	%	Units Installed	Installations	Costs	Cost/ Unit	Cost/ Household
Dwellings	Each	18,234	14%	-	0%	$ 3,931,106	38%	116,003	86%	11,679	100%	$ 6,335,297	62%	134,237	11,736	$ 10,266,403	$ 76.48	$ 874.78
Appliances																		
High Efficiency Clothes Washer	Each	133	100%	133	100%	$ 127,416	100%	-	0%	-	0%	-	0%	133	133	$ 127,416	$ 958	$ 958
Refrigerator	Each	463	100%	462	100%	$ 424,960	100%	-	0%	-	0%	-	0%	463	462	$ 424,960	$ 918	$ 920
Microwave	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	-	0%	-	-	$ -	$ -	$ -
Domestic Hot Water																		
Other Domestic Hot Water	Home	585	9%	585	9%	$ 46,094	12%	5,738	91%	5,738	91%	$ 323,709	88%	6,323	6,323	$ 369,803	$ 58	$ 58
Water Heater Repair/Replacement	Home	242	16%	242	16%	$ 501,525	75%	1,232	84%	1,232	84%	$ 170,887	25%	1,474	1,474	$ 672,412	$ 456	$ 456
Water Heater Tank and Pipe Insulation	Home	1	0%	1	0%	$ 61	0%	493	100%	493	100%	$ 28,459	100%	494	494	$ 28,519	$ 58	$ 58
New - Heat Pump Water Heater	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
New - Tub Diverter/ Tub Spout	Each	-	0%	-	0%	$ -	0%	61	100%	54	100%	$ 6,425	100%	61	54	$ 6,425	$ 105	$ 119
New - Thermostat-controlled Shower Valve	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
Combined Showerhead/TSV	Each	-	0%	-	0%	$ -	0%	5	100%	5	100%	$ 341	100%	5	5	$ 341	$ 68	$ 68
CAM - Central Boiler	Cap-kBTUh	2,805	100%	6	100%	$ 134,707	100%	-	0%	-	0%	$ -	0%	2,805	6	$ 134,707	$ 48	$ 22,451
CAM - Faucet Aerator	Each	23	100%	14	100%	$ 177	100%	-	0%	-	0%	$ -	0%	23	14	$ 177	$ 8	$ 13
CAM - Pipe Insulation	Home	3	100%	3	100%	$ 2,378	100%	-	0%	-	0%	$ -	0%	3	3	$ 2,378	$ 793	$ 793
Enclosure																		
Air Sealing	Home	737	18%	737	18%	$ 280,045	21%	3,254	82%	3,254	82%	$ 1,079,312	79%	3,991	3,991	$ 1,359,357	$ 341	$ 341
Attic Insulation	Home	22	38%	22	38%	$ 29,583	37%	36	62%	36	62%	$ 49,835	63%	58	58	$ 79,418	$ 1,369	$ 1,369
HVAC																		
FAU Standing Pilot Conversion	Each	-	0%	-	0%	$ -	0%	2	100%	2	100%	$ 681	100%	2	2	$ 681	$ 341	$ 341
Furnace Repair/Replacement	Each	506	29%	506	29%	$ 1,326,792	90%	1,237	71%	1,237	71%	$ 148,193	10%	1,743	1,743	$ 1,474,985	$ 846	$ 846
Room A/C Replacement	Each	-	0%	-	0%	$ -	0%	117	100%	117	100%	$ 125,839	100%	117	117	$ 125,839	$ 1,076	$ 1,076
Central A/C Replacement	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
Heat Pump Replacement	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
Evaporative Coolers (Replacement)	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
Evaporative Coolers (Installation)	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
Duct Test and Seal	Home	15	6%	15	6%	$ 5,088	13%	222	94%	222	94%	$ 32,705	87%	237	237	$ 37,793	$ 159	$ 159
New - Energy Efficient Fan Control	Home	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
New - Prescriptive Duct Sealing	Home	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
New - Smart Thermostat	Home	-	0%	-	0%	$ -	0%	194	100%	194	100%	$ 38,870	100%	194	194	$ 38,870	$ 200	$ 200
CAM - HEAT Pump Split System	Each	27	100%	3	100%	$ 58,464	100%	-	0%	-	0%	$ -	0%	27	3	$ 58,464	$ 2,206	$ 19,488
New - High Efficiency Forced Air Unit (HE FAU)	Home	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
New - A/C Time Delay	Home	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
CAM - AC Tune-up	Cap-Tons	147	100%	15	100%	$ 18,145	100%	-	0%	-	0%	$ -	0%	147	15	$ 18,145	$ 123	$ 1,210
CAM - Furnace Replacement	Cap-kBTUh	149	100%	2	100%	$ 4,955	100%	-	0%	-	0%	$ -	0%	149	2	$ 4,955	$ 33	$ 2,478
CAM - Programmable Thermostat	Each	4	100%	3	100%	$ 1,160	100%	-	0%	-	0%	$ -	0%	4	3	$ 1,160	$ 290	$ 387
Maintenance																		
Furnace Clean and Tune	Home	-	0%	-	0%	$ -	0%	1,291	100%	1,291	100%	$ 103,736	100%	1,291	1,291	$ 103,736	$ 80	$ 80
Central A/C Tune-up	Home	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
Evaporative Cooler Maintenance	Home	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
Lighting																		
Exterior Hard wired LED fixtures	Each	214	15%	139	18%	$ 14,766	14%	1,261	85%	640	82%	$ 91,359	86%	1,475	779	$ 106,125	$ 72	$ 136
Interior Hard wired LED fixtures	Each	323	8%	153	9%	$ 27,119	8%	3,929	92%	1,480	91%	$ 329,879	92%	4,252	1,633	$ 356,998	$ 84	$ 219
LED Night Light	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
LED Torchiere	Each	34	1%	32	1%	$ 3,047	1%	4,107	99%	2,505	99%	$ 378,159	99%	4,141	2,537	$ 381,206	$ 92	$ 150
New - LED A-Lamps	Each	265	0%	60	1%	$ 3,896	0%	60,881	100%	10,163	99%	$ 894,951	100%	61,146	10,223	$ 898,846	$ 15	$ 88
New - LED R/BR Lamps	Each	116	3%	33	3%	$ 1,876	3%	3,857	97%	1,079	97%	$ 62,368	97%	3,973	1,112	$ 64,243	$ 16	$ 58
CAM - Exterior LED Lighting	Fixture	2,122	100%	44	100%	$ 386,542	100%	-	0%	-	0%	$ -	0%	2,122	44	$ 386,542	$ 182	$ 8,785
CAM - Exterior LED Lighting - Pool	Lamp	2	100%	1	100%	$ 2,371	100%	-	0%	-	0%	$ -	0%	2	1	$ 2,371	$ 1,186	$ 2,371
Exterior LED Lighting - Spa	Each	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
CAM - Interior LED Fixture	Fixture	2,130	100%	35	100%	$ 246,434	100%	-	0%	-	0%	$ -	0%	2,130	35	$ 246,434	$ 116	$ 7,041
CAM - Interior LED Lighting	KiloLumen	905	100%	7	100%	$ 95,900	100%	-	0%	-	0%	$ -	0%	905	7	$ 95,900	$ 106	$ 13,700
CAM - Interior LED Screw-in	Lamp	943	100%	36	100%	$ 9,590	100%	-	0%	-	0%	$ -	0%	943	36	$ 9,590	$ 10	$ 266
CAM - Interior TLED Type A Lamps	Lamp	3,876	100%	35	100%	$ 49,755	100%	-	0%	-	0%	$ -	0%	3,876	35	$ 49,755	$ 13	$ 1,422
CAM - Interior TLED Type C Lamps	Lamp	1,402	100%	36	100%	$ 38,227	100%	-	0%	-	0%	$ -	0%	1,402	36	$ 38,227	$ 27	$ 1,062
CAM - Interior LED Exit Sign	Fixture	6	100%	1	100%	$ 783	100%	-	0%	-	0%	$ -	0%	6	1	$ 783	$ 130	$ 783
Miscellaneous																		
Smart Strip	Each	-	0%	-	0%	$ -	0%	1,691	100%	1,691	100%	$ 100,237	100%	1,691	1,691	$ 100,237	$ 59	$ 59
Smart Strip Tier II	Each	-	0%	-	0%	$ -	0%	3,032	100%	3,032	100%	$ 258,531	100%	3,032	3,032	$ 258,531	$ 85	$ 85
CAM - Tier-2 Smart Power Strip	Each	31	100%	8	100%	$ 2,989	100%	-	0%	-	0%	$ -	0%	31	8	$ 2,989	$ 96	$ 374
CAM - Variable Speed Pool Pump	Each	3	100%	3	100%	$ 3,948	100%	-	0%	-	0%	$ -	0%	3	3	$ 3,948	$ 1,316	$ 1,316
Ancillary Services																		
Commissioning	Home	-	0%	-	0%	$ -	0%	-	0%	-	0%	$ -	0%	-	-	$ -	$ -	$ -
CAM - Audit	Home	-	0%	51	100%	$ 82,311	100%	-	0%	-	0%	$ -	0%	-	51	$ 82,311	$ -	$ -
Customer Enrollment																		
ESA In-Home Energy Education	Home	-	0%	-	0%	-	0%	11,684	100%	11,684	100%	$ 341,081	100%	11,684	11,684	$ 341,081	$ 29	$ 29
ESA Outreach & Assessment	Home	-	0%	-	0%	-	0%	11,679	100%	11,679	100%	$ 1,769,744	100%	11,679	11,679	$ 1,769,744	$ 152	$ 152

[1] Summary data which includes ESA Program, CSD Leveraging, and MF Common Area efforts.
[2] Includes 57 ESA CAM properties treated in 2020.

	A	B	C	D	E
1	**SDG&E PY 2020 Energy Savings Assistance Program Annual Report** **ESAP Table 7** **Expenditures Recorded by Cost Element**				
2	**ESA Program:**	**Labor**	**Non-Labor**	**Contractor**	**Total [1]**
3	Energy Efficiency				
4	Appliances	$ -	$ -	$ 528,321	$ 528,321
5	Domestic Hot Water	$ -	$ -	$ 946,890	$ 946,890
6	Enclosure	$ -	$ -	$ 1,438,775	$ 1,438,775
7	HVAC	$ -	$ -	$ 1,678,168	$ 1,678,168
8	Maintenance	$ -	$ -	$ 103,736	$ 103,736
9	Lighting	$ -	$ -	$ 1,807,419	$ 1,807,419
10	Miscellaneous	$ -	$ -	$ 358,768	$ 358,768
11	Customer Enrollment	$ -	$ -	$ 1,801,230	$ 1,801,230
12	In Home Education	$ -	$ -	$ 341,081	$ 341,081
13	Contractor Advanced Funds	$ -	$ -	$ 907,821	$ 907,821
14	Pilot	$ -	$ 34,162	$ -	$ 34,162
15	Fund Shift Offset	$ -	$ -	$ -	$ -
16	Multi-Family Common Area Measures [2]	$ 85,172	$ (297,019)	$ 1,867,531	$ 1,655,683
17	Leveraging	$ -	$ -	$ -	$ -
18	**Energy Efficiency TOTAL**	**$ 85,172**	**$ (262,857)**	**$ 11,779,741**	**$ 11,602,055**
19					
20	Training Center	$ -	$ 12,601	$ -	$ 12,601
21	Inspections	$ 148,315	$ 11,511	$ -	$ 159,826
22	Marketing and Outreach	$ 24,407	$ 1,069,581	$ 79,995	$ 1,173,983
23	Statewide Marketing Education and Outreach	$ -	$ -	$ -	$ -
24	Measurement and Evaluation Studies	$ -	$ 21,893	$ -	$ 21,893
25	Regulatory Compliance	$ 203,938	$ 69,143	$ 252	$ 273,333
26	General Administration	$ 1,282,840	$ 673,659	$ 1,895	$ 1,958,394
27	CPUC Energy Division	$ -	$ 38,327	$ -	$ 38,327
28					
29	**TOTAL PROGRAM COSTS**	**$ 1,744,671**	**$ 1,633,859**	**$ 11,861,883**	**$ 15,240,412**
30					
31	[1] Adjusted to reflect program year 2020 contractor activity, net of accruals.				
32	[2] Negative amount due to mis-allocation of non-labor charges related to program year 2019, reversed in 2020.				
33					

	A	B	C	D	E	F	G	H
1	**SDG&E PY 2020 Energy Savings Assistance Program Annual Report ESAP Table 8 ESAP Homes Unwilling / Unable to Participate [1]**							
2	**Reason Provided**							
3	**County**	**Customer Unwilling/Declined Program Measures**	**Customer Unavailable - Scheduling Conflicts**	**Hazardous Environment (unsafe/unclean)**	**Landlord Refused to Authorize Participation**	**Household Income Exceeds Allowable Limits**	**Unable to Provide Required Documentation**	**Other Infeasible/ Ineligible**
4	SAN DIEGO	7,756	16,562	115	-	8,626	603	1,171
5	ORANGE	208	584	-	-	330	1	59
6	**Total**	**7,964**	**17,146**	**115**	**-**	**8,956**	**604**	**1,230**
7								
8								
9	[1] Summary data which includes ESA Program, CSD Leveraging, and MF Common Area efforts.							
10								
11	**ESAP Coordinated Treatment (SCE and SCG only)**							
12		**Reason Why Household did not Receive Additional Measures from one Utility or**						
13	**# of Households Received Measures from one Utility, but not other Utility or Partnering Agency**	**# of Customer Unwilling/Declined Program Measures**	**# of Customer Unavailable - Scheduling Conflicts**	**# of Hazardous Environment (unsafe/unclean)**	**# of Landlord Refused to Authorize Participation**	**# of Other Infeasible/ Ineligible**		
14								
15								
16	**Total**	**-**	**-**	**-**	**-**	**-**		
17								
18								
19	[1] Summary data which includes ESA Program, CSD Leveraging, and MF Common Area efforts.							
20								

	A	B	C	D	E	F	G
1	**SDG&E PY 2020 Energy Savings Assistance Program Annual Report** **ESAP Table 9** **Life Cycle Bill Savings by Measure**						
2	**Measure Name**	**Unit**	**2020 Number Installed**	**Per Measure Electric Impact (kWh)**	**Per Measure Gas Impact (Therms)**	**Effective Useful Life (years)**	**2020 Total Measure Life Cycle Bill Savings**
3	**Appliances**						
4	High Efficiency Clothes Washer	Each	133	7.85	18.06	11	$ 37,481
5	Refrigerator	Each	463	584.14	-	14	$ 711,227
6	Microwave	Each	-				
7	**Domestic Hot Water**						
8	Other Domestic Hot Water	Home	5,742	3.92	2.90	10	$ 264,822
9	Water Heater Tank and Pipe Insulation	Home	494	-	0.52	9	$ 3,080
10	Water Heater Repair/Replacement	Each	1,461	-	28.88	11	$ 620,593
11	Combined Showerhead/TSV	Each	5		6.16	10	$ 412
12	New - Heat Pump Water Heater	Each	-				
13	New - Tub Diverter/ Tub Spout	Each	61	2.80	1.90	10	$ 1,872
14	New - Thermostat-controlled Shower Valve	Each	-				
15	**Enclosure**						
16	Air Sealing / Envelope	Home	3,941	14.96	0.37	3	$ 39,137
17	Caulking	Home	-				
18	Attic Insulation	Home	58	71.47	33.19	20	$ 67,043
19	**HVAC**						
20	FAU Standing Pilot Conversion	Each	2	-	10.00	20	$ 535
21	Furnace Repair/Replacement	Each	1,515	-	(14.19)	20	$ (574,870)
22	Room A/C Replacement	Each	116	(43.29)	-	9	$ (8,490)
23	Central A/C replacement	Each	-				
24	Heat Pump Replacement	Each	-				
25	Evaporative Cooler (Replacement)	Each	-				
26	Evaporative Cooler (Installation)	Each	-				
27	Duct Test and Seal	Home	227	-	5.07	3	$ 4,620
28	New - Energy Efficient Fan Control	Home	-				
29	New - Prescriptive Duct Sealing	Home	-				
30	New - High Efficiency Forced Air Unit (HE FAU)	Home	-				
31	New - A/C Time Delay	Home	-				
32	New - Smart Thermostat	Home	194	96.39	6.47	9	$ 46,708
33	**Maintenance**						
34	Furnace Clean and Tune	Home	1,291	-	(2.10)	3	$ (10,853)
35	Central A/C Tune-up	Home	-				
36	**Lighting**						
37	Interior Hard wired LED fixtures	Each	4,252	4.23	(0.08)	16	$ 47,069
38	Exterior Hard wired LED fixtures	Each	1,475	5.14	-	16	$ 22,785
39	LED Torchiere	Each	4,141	4.23	(0.08)	16	$ 45,905
40	Occupancy Sensor	Each	-				
41	LED Night Light	Each	-				
42	New - LED R/BR Lamps	Each	3,973	3.02	(0.05)	16	$ 31,751
43	New - LED A-Lamps	Each	61,146	2.12	(0.04)	16	$ 343,409
44	**Miscellaneous**						
45	Pool Pumps	Each	-				
46	Smart Strip	Each	1,691	140.00	-	5	$ 222,341
47	Smart Strip Tier II	Each	3,032	140.00	-	5	$ 398,663
48	**Pilots**						
49							
50							
51	**Total**						$ 2,315,240
52							
53	**Total Homes Served By the Program**	11,679					
54	**Life Cycle Bill Savings Per Home**	$ 198					
55							
56	This table includes ESA treated homes only. ESA CAM properties are not included.						
57	Savings estimates are sourced from the PY 2015 to 2017 ESA Impact Evaluation; Energy Division instructed the IOUs to use these results for 2019 and 2020 savings estimates.						
58	Per measure kWh and therm impacts are presented as total kWh savings divided by total participants and total therm savings divided by total participants.						
59	Average rates for kWh and therms paid by ESA participants in 2020 was used to calculate lifecycle bill savings.						
60							

	A	B	C
1	**SDG&E PY 2020 Energy Savings Assistance Program Annual Report** **ESAP Table 10** **Energy Rate Used for Bill Savings Calculations [1]**		
2	Year	$/kWh	$/Therm
3	2020	0.19	1.34
4	2021	0.20	1.38
5	2022	0.19	1.12
6	2023	0.19	1.15
7	2024	0.20	1.18
8	2025	0.20	1.22
9	2026	0.21	1.26
10	2027	0.22	1.29
11	2028	0.22	1.33
12	2029	0.23	1.37
13	2030	0.24	1.41
14	2031	0.24	1.46
15	2032	0.25	1.50
16	2033	0.26	1.54
17	2034	0.27	1.59
18	2035	0.27	1.64
19	2036	0.28	1.69
20	2037	0.29	1.74
21	2038	0.30	1.79
22	2039	0.31	1.84
23	2040	0.32	1.90
24	2041	0.33	1.96
25	2042	0.34	2.02
26	2043	0.35	2.08
27	2044	0.36	2.14
28	2045	0.37	2.20
29			
30	[1] For 2020, the average cost per kWh and therm paid by ESA participants is shown. Cost is escalated 3% annually for remaining years. These values do not include adjustments for TOU rates. Only the 2020 value is used to calculate lifecycle bill savings for this report.		
31			

	A	B	C	D	E
1	**SDG&E PY 2020 Energy Savings Assistance Program Annual Report ESAP Table 11 Bill Savings Calculations by Program Year**				
2	**Program Year**	**Program Costs**	**Program Lifecycle Bill Savings**	**Program Bill Savings/ Cost Ratio**	**Per Home Average Lifecycle Bill Savings**
3	2011	$ 20,950,509	$ 11,372,235	0.54	$ 504
4	2012	$ 21,046,806	$ 10,325,509	0.49	$ 461
5	2013	$ 17,874,649	$ 7,897,313	0.44	$ 450
6	2014	$ 19,143,282	$ 9,030,922	0.47	$ 410
7	2015	$ 17,355,596	$ 5,632,584	0.32	$ 279
8	2016	$ 17,511,142	$ 5,435,882	0.31	$ 275
9	2017	$ 30,649,505	$ 5,891,654	0.19	$ 272
10	2018	$ 22,780,528	$ 15,889,992	0.70	$ 743
11	2019	$ 18,146,973	$ 2,988,782	0.16	$ 184
12	2020	$ 12,620,852	$ 2,315,240	0.18	$ 198
13					
14	2020 Program Costs do not include $907,821 advanced to contractors.				

SDG&E PY 2020 Energy Savings Assistance Program Annual Report
ESAP Table 12
Fund Shifting [1]

Date	Program Year 2020	Budget [1] Electric	Budget [1] Gas	Budget [1] Total Authorized	Expenditures Electric	Expenditures Gas	Expenditures Total Expenditures	(Shift) or Carried Forward (Budget - Expenditures = Variance) Electric	Variance Gas	Variance Total	FUND SHIFT AMOUNT: Among Categories within Program Year 1-3 (1) Shift of Current Year Authorized Electric	Among Categories (1) Gas	Among Categories (1) Total	Carry Forward from 2019 (2) Shift of Carry Forward Electric	Carry Forward (2) Gas	Carry Forward (2) Total	Carry Back from 2021 (3) Shift of Carry Back Electric	Carry Back (3) Gas	Carry Back (3) Total	Total Shifted Gas/ Electric[4]	% of Authorized Total	Fund Shifting Source 1. Current Year Authorized 2. Carried Forward 3. Carried Back	To/From Year	Fund Shift Description	Authorization
		ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	ex. $x,xxx	(Sx,xxx)	x%				G-xxxx, D.xx- xx-xxx
	ESA Program:																								
	Energy Efficiency																								
	Appliance	$ 854,260	$ 319,826	**$ 1,174,086**	$ 395,882	$ 132,439	**$ 528,321**	$ 458,378	$ 187,386	**$ 645,764**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0.0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Domestic Hot Water	$ 65,958	$ 2,132,630	**$ 2,198,588**	$ 28,407	$ 918,483	**$ 946,890**	$ 37,551	$ 1,214,147	**$ 1,251,698**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Enclosure	$ 2,560,350	$ 3,393,952	**$ 5,954,302**	$ 618,673	$ 820,102	**$ 1,438,775**	$ 1,941,677	$ 2,573,851	**$ 4,515,527**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	HVAC [4]	$ 427,358	$ 3,727,353	**$ 4,154,711**	$ 179,081	$ 1,499,087	**$ 1,678,168**	$ 248,276	$ 2,228,266	**$ 2,476,543**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Maintenance	$ 7,063	$ 291,617	**$ 298,680**	$ -	$ 103,736	**$ 103,736**	$ 7,063	$ 187,881	**$ 194,944**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Lighting	$ 4,642,829	$ -	**$ 4,642,829**	$ 1,807,419	$ -	**$ 1,807,419**	$ 2,835,409	$ -	**$ 2,835,409**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Miscellaneous	$ 1,775,159	$ -	**$ 1,775,159**	$ 358,768	$ -	**$ 358,768**	$ 1,416,391	$ -	**$ 1,416,391**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0.0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Customer Enrollment	$ 2,195,740	$ 2,195,740	**$ 4,391,481**	$ 900,615	$ 900,615	**$ 1,801,230**	$ 1,295,125	$ 1,295,125	**$ 2,590,250**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	In Home Education[2]	$ 534,345	$ 534,345	**$ 1,068,689**	$ 170,540	$ 170,540	**$ 341,081**	$ 363,804	$ 363,804	**$ 727,609**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0.0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Contractor Advanced Funds	$ -	$ -	**$ -**	$ 453,911	$ 453,911	**$ 907,821**	$ (453,911)	$ (453,911)	**$ (907,821)**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0.0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Pilot[2]	$ 25,000	$ 25,000	**$ 50,000**	$ 17,081	$ 17,081	**$ 34,162**	$ 7,919	$ 7,919	**$ 15,838**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Fund Shifting Offset	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Multi-Family Common Area Measures	$ 1,767,500	$ 1,767,500	$ 3,535,000	$ 869,069	$ 786,614	$ 1,655,683	$ 898,431	$ 980,886	**$ 1,879,317**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Leveraging	$ 241,216	$ 241,216	$ 482,431	$ -	$ -	$ -	$ 241,216	$ 241,216	**$ 482,431**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Energy Efficiency TOTAL	**$ 15,096,777**	**$ 14,629,178**	**$ 29,725,955**	**$ 5,799,447**	**$ 5,802,608**	**$ 11,602,055**	**$ 9,297,330**	**$ 8,826,570**	**$ 18,123,899**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	0.0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Training Center	$ 249,089	$ 249,089	$ 498,179	$ 6,301	$ 6,301	$ 12,601	$ 242,789	$ 242,789	**$ 485,578**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Inspections	$ 90,210	$ 90,210	$ 180,420	$ 79,913	$ 79,913	$ 159,826	$ 10,297	$ 10,297	**$ 20,594**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Marketing and Outreach	$ 600,000	$ 600,000	$ 1,200,000	$ 586,992	$ 586,991	$ 1,173,983	$ 13,008	$ 13,009	**$ 26,017**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Statewide ME&C[2]	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	M&E Studies[2]	$ 47,708	$ 47,708	$ 95,416	$ 10,947	$ 10,947	$ 21,893	$ 36,761	$ 36,761	$ 73,523	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0.0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Regulatory Compliance[2]	$ 168,266	$ 168,266	$ 336,532	$ 136,667	$ 136,666	$ 273,333	$ 31,599	$ 31,600	$ 63,199	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	General Administration[2]	$ 1,368,601	$ 1,368,601	$ 2,737,202	$ 979,198	$ 979,197	$ 1,958,394	$ 389,403	$ 389,404	$ 778,808	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	CPUC Energy Division[2]	$ 23,877	$ 23,877	$ 47,754	$ 19,164	$ 19,164	$ 38,327	$ 4,713	$ 4,714	$ 9,427	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	Reallocation (ME&O budget reduced from $1.2M)	$ 343,848	$ 343,848	$ 687,695	$ -	$ -	$ -	$ 343,848	$ 343,848	**$ 687,695**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	$ -	**$ -**	$ -	0%	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
	TOTAL PROGRAM COSTS	**$ 17,988,376**	**$ 17,520,777**	**$ 35,509,153**	**$ 7,618,627**	**$ 7,621,785**	**$ 15,240,412**	**$ 10,369,749**	**$ 9,890,991**	**$ 20,260,740**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**0.0%**				
	Carryforward from 2019 and prior years[2]	$ 34,380,143	$ 37,886,959	$ 72,267,102	$ -	$ -	$ -	$ 34,380,143	$ 37,886,959	$ 72,267,102				$ 34,380,143	$ 37,886,959	$ 72,267,102									
	Approved Budget for Unspent Funds in 2020	$ 2,250,253	$ 2,250,253	$ 4,500,505			$ -	$ 2,250,253	$ 2,250,253	$ 4,500,505				$ 2,250,253	$ 2,250,253	$ 4,500,505									
	TOTAL PROGRAM INCLUDING CARRY FORWARD / CARRY BACK	**$ 50,118,266**	**$ 53,157,483**	**$ 103,275,749**	**$ 7,618,627**	**$ 7,621,785**	**$ 15,240,412**	**$ 42,499,639**	**$ 45,535,690**	**$ 88,035,337**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**					

[1] Reflects authorized budget in SDG&E Advice Letter 3065-E-A/2568-G-A approved by Commission Resolution E-4884 on December 14, 2017 and SDG&E Advice Letter 3250-E/2688-G approved by Commission on December 27, 2018.

[2] Prior written authorization from the Commission is required before the utilities can shift into or out of these categories.

[3] Carryforward from 2016 and prior years includes approved carryforward fund shifting in D.14-08-030 of $9,398,216 and a budget augmentation for gas in the amount of $3,769,897.

[4] Total unspent funds are based on Authorized budgets less expenditures. The unspent amount is not the same as the amounts (over/under collection) in the Balancing Accounts which are based on the annual collections minus the annual expenditures.

[5] SDG&E's unspent/over-collected funds at the end of 2016 totalled $23,322,672. D.16-11-022 authorized $12,999,109 to be used in the 2017-2020 budget cycle.

[6] The "Expenditures-Electric" (cell F13) and "Expenditures-Gas" (cell G13) may be inaccurate. However, the "Total Expenditures" (cell H13) is correct. SDG&E has identified a system issue that resulted in HVAC measures being classified to incorrect HVAC subcategories. The total discrepancy amount is $8,239. Thus, there are $8,239 of expenses where it is unclear what the expense allocation should be between gas and electric. SDG&E was unable to reconcile the discrepancy prior to the Annual Report deadline; however, the total reported expenses reflect the correct total.

Total Unspent Funds Carry forward into 2019[5]	**$ 34,380,143**	**$ 37,886,959**	**$ 72,267,102**
Total Shifted during 2020	$ -	$ -	$ -
Remaining Carryforward from 2016 after fund shift for 2020	**$ 34,380,143**	**$ 37,886,959**	**$ 72,267,102**
Totals not available for fund shift w/out prior written authorization	$ 462,478	$ 462,479	$ 924,957
2020 Unspent Funds	$ 9,907,271	$ 9,436,512	$ 19,343,784
Total Unspent Funds Carry forward into 2021[5]	**$ 44,749,892**	**$ 47,785,950**	**$ 92,535,842**

	Electric	Gas	Total
Total Unspent/Over-collected Funds from 2016[5]	$ 12,313,334	$ 11,009,338	$ 23,322,672
Unspent Funds Approved for Use in Resolution E-4884	$ 6,419,980	$ 6,539,812	$ 12,959,792
Not Unspent/Over-collected (2009-2016) available to offset rates	**$ 5,893,354**	**$ 4,469,526**	**$ 10,362,880**
Unspent/Over-collected Funds from 2017	$ 5,438,620	$ (315,786)	$ 5,122,834
Total Unspent/Overcollected Funds Available to Offset Future Rates	**$ 11,331,974**	**$ 4,153,740**	**$ 15,485,714**
Unspent/Over-collected Funds from 2018	$ 3,025,816	$ 5,606,088	$ 8,631,904
Rates	**$ 14,357,790**	**$ 9,759,828**	**$ 24,117,618**
Unspent/Over-collected Funds from 2019	$ (3,645,617)	$ (2,147,148)	$ (5,792,765)
Rates	**$ 10,712,173**	**$ 7,612,680**	**$ 18,324,853**
Unspent/Over-collected Funds from 2020	$ 4,269,872	$ 2,185,995	$ 6,455,868
Rates	**$ 14,982,046**	**$ 9,798,676**	**$ 24,780,721**

	A	B
1	**SDG&E PY 2020 Energy Savings Assistance Program Annual Report**	
2	**ESAP Table 13**	
3	**Categorical and Other Enrollment [1]**	
4		
5		
6	**Type of Enrollment**	**Number of Homes Treated**
7	Women, Infants, and Children Program (WIC)	255
8	Supplemental Security Income (SSI)	553
9	CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	1,004
10	CalWORKs/Temporary Assistance for Needy Families (TANF)	72
11	Tribal TANF	-
12	Medicaid/Medi-Cal for Families	206
13	Healthy Families A&B	1,061
14	National School Lunch Program (NSLP) - Free Lunch	152
15	Low-income Home Energy Assistance Program (LIHEAP)	579
16	Bureau of Indian Affairs General Assistance	-
17	Head Start Income Eligible - (Tribal Only)	-
18	CARE Income Certified	205
19	80/20	-
20	Targeted Self Certification	5,847
21	Standard Enrollment	1,745
22	**Total**	**11,679**
23		
24	[1] Summary data which includes ESA Program and CSD Leveraging efforts.	
25	Note: Does not include MF common area efforts.	
26		

SDG&E PY 2020 Energy Savings Assistance Program Annual Report
ESAP Table 14
Leveraging & Integration [1][6]

Partner	Brief Description of Effort	Relationship outside the IOU?	MOU Present?	Amount of Dollars Saved [2]	Amount of Energy Savings [3]	Other Measurable Benefits [3]	Enrollments Resulting from Leveraging Effort [4]	Methodology [5]	Meets all Criteria	If not, Explain
LIHEAP	SDG&E's partners with local CSD agencies to enroll eligible LIHEAP bill assistance customers in the ESA Program. ESA expanded efforts which allowed LIHEAP agencies to preform outreach and assessment services.	Y	Y	NA	kWh: 3,005 kW: 0 Therms: 103	NA	579	Sum of savings per treated homes identified as having LIHEAP as program for categorical enrollment.	No	We are unable to accurately track dollars saved from this effort.
CSD	Data sharing effort providing CSD with customer usage information for CSD client receiving weatherization service and payment assistance	Y	Y	NA	NA	NA	NA	NA	No	We are unable to accurately track dollars saved from this effort.
SASH	Leveraging partnership with GRID where SDG&E received list of potential ESA Leads. Lead generated ESA Program enrollments.	Y	Y	N/A	NA	N/A	NA	NA	No	We are unable to accurately track dollars saved from this effort.
SDCWA	Partnership to leverage installation of customers receiving water saving measures in SDCWA service territory. SDCWA provides rebates to SDG&E for measures.	Y	Y	$ 154,665	NA	NA	NA	Internal order used to track rebated dollars received through from SDCWA.	Yes	NA
CARE/Medical Baseline	Marketing to customers enrolled in CARE and/or Medical Baseline	N	N	NA	kWh: 5,333 kW: 1 Therms: 55	NA	15	Sum of savings per treated homes identified as having CARE or Medical Baseline as lead source.	No	We are unable to accurately track dollars saved from this effort.
CARE High Usage	Automated Lead Generation for CARE High Usage Verification Process	N	N	NA	kWh: 65,275 kW: 9 Therms: 218	NA	26	Sum of savings per treated homes identified as having CARE High Usage as lead source.	No	We are unable to accurately track dollars saved from this effort.

[1] Leveraging, Interdepartmental integration, Program Coordination, Data Sharing, ME&O, etc.

[2] Leveraging and Integration efforts are measurable and quantifiable in terms of dollars saved by the IOU (Shared/contributed/donated resources, shared marketing materials, shared information technology, shared programmatic infrastructure, among others are just some examples of cost and/or resource savings to the IOU).

[3] Annual Energy savings/benefits for measures installation in 2020. Leveraging efforts are measurable and quantifiable in terms of home energy benefits/ savings to the eligible households.

[4] Enrollment increases. Leveraging efforts are measurable and quantifiable in terms of program enrollment increases and/or customers served.

[5] In footnotes, provide information on methodology used to calculate cost and/or resource savings.

[6] Summary data which includes ESA Program, CSD Leveraging, and MF common area efforts.

Fields not applicable to specific efforts are marked "N/A".

	A	B	C	D	E	F
1	**SDG&E PY 2020 Energy Savings Assistance Program Annual Report**					
2	**ESAP Table 15**					
3	**CFL Lighting [3]**					
4						
5	**ESA Program CFL Tracking Table**					
6	*Instructions: Please identify the CFL bulbs used within your ESA program and fill in the remaining columns for each*					
7	**Bulb Name / Identification**	**Bulb Description (wattage, lumens)**	**Bulb Cost (material)**	**Admin Cost (overhead, contractor fee, marketing, etc.)**	**Total Bulb Cost (material + admin) [1]**	**AB 1109 Compliant? [2]**
8						
9						
10	**This Table is Not Applicable.**					
11	**Commission D.16-11-022 and D.17-12-009 directs the IOU to no longer offer CFL's in ESA Program beginning 1/1/2018.**					
12						
13						
14						
15						
16						
17	**Year**	**Number of Homes Treated in ESA Program**	**Number of Homes Provided CFLs**	**Avg. # of CFL bulbs given per home**	**Est. total energy savings from installed CFLs**	
18	2009	20,927	17,653	6	1,796,496	
19	2010	21,593	17,016	7	1,796,176	
20	2011	22,575	17,246	6	1,697,568	
21	2012	22,415	17,046	6	1,772,269	
22	2013	17,568	11,639	6	1,502,883	
23	2014	22,039	20,895	6	2,207,495	
24	2015	20,209	18,724	6	1,856,926	
25	2016	19,792	18,606	5	1,626,672	
26	2017	21,677	11,343	5	1,036,278	
27	2018	21,387	-	0	-	
28	2019	16,271	-	0	-	
29	2020	11,679	-	0	-	
30						
31	[1] Bulb cost and admin cost were combined effective 2013.					
32						
33	[2] Compliant in regards to: 1) Do bulbs meet or exceed CEC energy efficiency standards for general purpose lighting?					
34	Do all models comply with Europe's RoHS standards on toxicity?					
35						
36	[3] Summary data which includes ESA Program, CSD Leveraging, and MF efforts.					
37						

	A	B	C	D	E	F	G
1	**SDG&E PY 2020 Energy Savings Assistance Program Annual Report**						
2	**ESAP Table 16**						
3	**"Add Back" Measures**						
4							
5			**Ratio of Benefits Over**				
6	**Measure [1]**	**Climate Zone**	**ESACET**	**Resouce Test**	**Quantity Installed**	**Budget Impact of "Add Back"**	**Lifecycle Bill Savings Impact**
7	Attic Insulation Gas MF	7,10,14,15	N/A	N/A	-	$ -	$ -
8	Duct Test and Seal Electric SF	7,10,14,15	0.05	N/A	2	$ 199	$ -
9	Duct Test and Seal Gas MH	7,10,14,15	0.05	N/A	33	$ 13,028	$ -
10	Duct Test and Seal Gas SF	7,10,14,15	0.13	0.16	192	$ 24,566	$ 4,620
11	Furnace Repair/Replacement Gas MF	7,10,14,15	(0.37)	N/A	45	$ 35,232	$ (21,177)
12	Furnace Repair/Replacement Gas MH	7,10,14,15	0.05	N/A	798	$ 797,677	$ -
13	Furnace Repair/Replacement Gas SF	7,10,14,15	(0.54)	N/A	669	$ 641,883	$ (553,694)
14	Room A/C Replacement MF	10	0.05	N/A	81	$ 91,099	$ -
15	Room A/C Replacement MH	10	0.05	N/A	8	$ 8,531	$ -
16	Room A/C Replacement SF	10	(0.12)	N/A	27	$ 26,209	$ (8,490)
17	Water Heater Repair/Replacement Gas MF	7,10,14,15	0.76	0.65	40	$ 19,000	$ 18,235
18	Water Heater Repair/Replacement Gas MH	7,10,14,15	0.83	0.93	800	$ 387,369	$ 529,416
19	Water Heater Repair/Replacement Gas SF	7,10,14,15	0.43	0.19	620	$ 265,870	$ 72,942
20							
21	Notes:						
22	[1] Based on Appendix J.1 and J.2 in D.12-08-044 and D.14-08-030.						
23	Non-energy benefits for duct test and seal, furnace repair/replacement and room a/c replacement were reallocated within their end use category using a cost base instead of a savings base. This was done to avoid assigning zero or negative non-energy benefits to these measures which may have zero or negative energy savings but positive non-energy benefits.						
24							

	A	B	C	D	E	F	G	H	I	J
1	**SDG&E PY 2020 Energy Savings Assistance Program Annual Report**									
2	**ESAP Table 17**									
3	**Expenditures for Pilots and Studies**									
4										
5		**Authorized 2020 Funding [1]**			**2020 Expenses**			**% of Budget Expensed**		
6		**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**	**Electric**	**Gas**	**Total**
7	**Pilots**									
8										
9	Programmable Controllable Thermostat	$ 25,000	$ 25,000	$ 50,000	$ 17,081	$17,081	$ 34,162	68%	68%	68%
10										
11	**Total Pilots**	**$25,000**	**$25,000**	**$50,000**	**$17,081**	**$17,081**	**$34,162**	**68%**	**68%**	**68%**
12										
13										
14	**Studies**									
15										
16	Low Income Needs Assessment Study	$ 8,334	$ 8,334	$ 16,667	$ -	$ -	$ -	0%	0%	0%
17	Load Impact Evaluation Study	$ 9,167	$ 9,167	$ 18,333	$ -	$ -	$ -	0%	0%	0%
18	Equity Criteria and Non Energy Benefits Evaluation (NEB's)	$ 2,500	$ 2,500	$ 5,000	$ -	$ -	$ -	0%	0%	0%
19	Unallocated Funds [2]	$ (2,917)	$ (2,917)	$ (5,834)	$ -	$ -	$ -	0%	0%	0%
20	2017 Potential and Goals Study [3]	$ 5,625	$ 5,625	$ 11,250	$ -	$ -	$ -	0%	0%	0%
21	Rapid Feedback Research and Analysis	$ 25,000	$ 25,000	$ 50,000	$ 10,947	$10,947	$ 21,893	44%	44%	44%
22										
23	**Total Studies**	**$47,708**	**$47,708**	**$95,416**	**$10,947**	**$10,947**	**$21,893**	**23%**	**23%**	**23%**
24										
25	[1] Reflects authorized budget in SDG&E Advice Letter 3065-E-A/2568-G-A approved by Commission Resolution E-4884 on December 14, 2017 and SDG&E Advice Letter 3250-E/2688-G approved by Commission on December 27, 2018.									
26	[2] 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, and is now unallocated to a specific study.									
27	[3] The Commission's Energy Division invoiced this study to the Energy Efficiency Program.									
28										

	A	B	C	D	E
1	**SDG&E PY 2020 Energy Savings Assistance Program Annual Report**				
2	**ESAP Table 18**				
3	**Miscellaneous (2nd Refrigerators, Education Only, A/C Cycling, etc.)**				
4					
5	**Measures**	**Units**	**Received Refrigerator**	**Not eligible for Refrigerator due to Less than Six Occupants**	
6					
7	Second Refrigerators	Each	1	0	
8					
9					
10	**Measures**	**Units**	**Households that Only Received Education**		
11					
12					
13	In-Home Education	Home	0		
14					
15					
16	**Households for My Energy/My Account Platform**			**Households that Received ESA Program Measures and Elect to:**	
17	**Opt-Out**	**Already Enrolled**	**Opt-In**	**Opt-In to a New Program (DR or alternative tariff)**	
18	9,088	2,361	451	NA	
19					
20					
21					
22	**Households Received A/C Cycling Controls when A/C**				
23		# Installed			
24	A/C Cycling controls	NA			
25					
26					

SDG&E PY 2020 Energy Savings Assistance Program Annual Report
ESAP Table 19
Contractor Advanced Funding and Repayment

			B-C			E x F			(B)-(cumulative H + cumulative I)
	Total Advanced Amount[7]	Total Advance Eligible for PPRS Credit [1]	Total Advance Not Eligible for PPRS Credit	Percentage for PPRS Credit Calculation [2]	Total Contractor Invoices each month[3]	Total PPRS Credit Earned each month[4]	PPRS Credits Applied each month [5]	Non PPRS Payments Applied each month[6]	Total Advances Outstanding
Jan-20									$ -
Feb-20									$ -
Mar-20									$ -
Apr-20	$ 552,731				$ -	$ -	$ -	$ -	$ 552,731
May-20	$ 411,190				$ -	$ -	$ -	$ 87,672	$ 876,249
Jun-20	$ 205,120				$ -	$ -	$ -	$ 53,278	$ 1,028,091
Jul-20	$ -				$ -	$ -	$ -	$ 33,550	$ 994,541
Aug-20	$ -				$ -	$ -	$ -	$ 86,720	$ 907,821
Sep-20	$ -				$ -	$ -	$ -	$ -	$ 907,821
Oct-20	$ -				$ -	$ -	$ -	$ -	$ 907,821
Nov-20	$ -				$ -	$ -	$ -	$ -	$ 907,821
Dec-20	$ -	$ 528,147	$ 640,894	40%	$ 116,756	$ 44,731	$ -	$ -	$ 907,821
Total	$ 1,169,041	$ 528,147	$ 640,894	40%	$ 116,756	$ 44,731	$ -	$ 261,220	$ 907,821

IOUs - Do not delete footnotes 1-6 below.
[1] Contractor labor and labor-related costs. Post-Pandemic Return to Service (PPRS) credit eligible.
[2] 40% for PPRS credit calculation from Joint Tier 2 Advice Letter 5654-G filed on June 29, 2020.
[3] For work performed during PPRS credit-earning period for contractors receiving advances. SDG&E PPRS earning period began December 1, 2020.
[4] Based on total monthly contractor invoices, up to maximum allowable for each contractor.
[5] Credits may be applied at a later date than earned depending on the contractor repayment schedule. This value should not exceed column G.
[6] Includes repayments processed for which PPRS credits were not applied, including contractor payments returned unused due to agreement termination or
[7] Advance funding provided to contractors in month occurred.
Note: This table created pursuant to section 1.2.3 in Commission Resolution E-5074. This report covers the period from the issuance of advances until the last day of the month reported.

	A	B	C	D	E	F	G	H
1	**SDG&E PY 2020 CARE Annual Report**							
2	**CARE Table 1**							
3	**Overall Program Expenses**							
4	**Category**	**Overall Expenditures**		**Total**	**Authorized Budget[1]**	**% of Budget Spent**	**Total Shifted[2]**	**Shifted to/from?**
5		**Electric**	**Gas**					
6	Outreach	$ 2,291,092	$ 294,312	$ 2,585,404	$ 3,254,171	79%		
7	Processing, Certification, Recertification[3]	$ 519,329	$ 65,480	$ 584,809	$ 584,809	100%	$ 67,598	Shifted from IT Programming
8	Post Enrollment Verification	$ 125,490	$ 15,874	$ 141,364	$ 363,667	39%		
9	IT Programming	$ 654,697	$ 83,846	$ 738,543	$ 1,487,000	50%	$ (232,900)	Shifted to Processing, Certification, Recertification; Regulatory Compliance; CPUC Energy Division
10	Cool Centers[4]	$ -	$ -	$ -	$ -	0%		
11	Pilots	$ 202,380	$ 25,872	$ 228,253	$ 267,733	85%		
12	Measurement & Evaluation	$ -	$ -	$ -	$ -	0%		
13	Regulatory Compliance	$ 390,146	$ 47,230	$ 437,376	$ 437,376	100%	$ 133,723	Shifted from IT Programming
14	General Administration[3]	$ 599,821	$ 75,342	$ 675,163	$ 836,246	81%		
15	CPUC Energy Division	$ 79,411	$ 10,020	$ 89,431	$ 89,431	100%	$ 31,579	Shifted from IT Programming
16								
17	**TOTAL Program Costs**	**$ 4,862,366**	**$ 617,977**	**$ 5,480,343**	**$ 7,320,433**	**75%**	**$0**	
18								
19	CARE Rate Discount[5]	$ 123,202,068	$ 16,412,232	**$ 139,614,300**	$ 122,423,531	114%	$ -	
20	Service Establishment Charge Discount	$ -	$ -	**$ -**	$ -	0%	$ -	
21								
22	**TOTAL PROGRAM COSTS & CUSTOMER DISCOUNTS**	**$ 128,064,434**	**$ 17,030,209**	**$ 145,094,643**	**$ 129,743,964**	**112%**	**$0**	
23								
24	1. Reflects total authorized funding approved in the CPUC Energy Division Disposition Letter dated 12/27/2018 approving SDG&E Advice Letter 3250-E/2688-G.							
25	2. Reflects fund shift in accordance with the rules set forth in D. 08-11-031 as modified by D. 10-10-008, D. 10-16-11-022, and D 17-12-009, which granted the IOUs authority to shift funds between the CARE program categories.							
26	3. Includes reversal of 2019 manual adjustment of $1,393 for janitorial supply costs incorrectly posted to Expanded CARE in May 2019 and reclassed to General Administration in February 2020.							
27	4. Cool Centers budget of $43,500 and related expenses of $42,048 were reclassed to O&M (reclass posted in June 2020) per 2019 GRC Decision (D.19-09-051).							
28	5. CARE Rate Discount total updated in September from $74,571,504 to $122,423,531, as authorized in AL 3440-E and AL 2815-G, effective January 1, 2020.							
29								

SDG&E PY 2020 CARE Annual Report

CARE Table 2

Enrollment, Recertification, Attrition, & Penetration

	New Enrollment										Recertification				Attrition (Drop Offs)					Enrollment				
	Automatic Enrollment				Self-Certification (Income or Categorical)					Total New Enrollment (E+J)														
	Inter-Utility [1]	Intra-Utility [2]	Leveraging [3]	Combined (B+C+D)	Online	Paper	Phone	Capitation	Combined (F+G+H+I)		Scheduled	Non-Scheduled (Duplicates)	Automatic	Total Recertification (L+M+N)	No Response [4]	Failed PEV	Failed Recertification	Other	Total Attrition (P+Q+R+S)	Gross (K+O)	Net Adjusted (K-T)	Total CARE Participants	Estimated CARE Eligible	Penetration Rate % (W/X)
January	70	172	0	242	4,374	1,319	344	246	6,283	6,525	3,909	3,619	4,130	11,658	1,443	66	171	3,712	5,392	18,183	1,133	302,943	302,245	100%
February	0	146	0	146	4,480	983	244	244	5,951	6,097	1,917	2,859	4,160	8,936	1,671	77	154	3,123	5,025	15,033	1,072	304,015	302,245	101%
March	0	79	0	79	7,040	1,303	630	238	9,211	9,290	2,066	2,409	2,298	6,773	64	9	42	3,116	3,231	16,063	6,059	310,074	302,245	103%
April	0	38	0	38	6,925	1,140	712	216	8,993	9,031	220	664	0	884	398	8	9	2,360	2,775	9,915	6,256	316,330	302,245	105%
May	17	6	0	23	6,392	1,288	1,086	213	8,979	9,002	13	581	0	594	0	0	0	2,250	2,250	9,596	6,752	323,082	302,245	107%
June	152	22	0	174	5,278	718	491	164	6,651	6,825	10	434	1	445	0	0	1	2,976	2,977	7,270	3,848	326,930	302,245	108%
July	48	32	0	80	4,872	740	444	176	6,232	6,312	42	482	0	524	0	1	0	3,334	3,335	6,836	2,977	329,907	302,245	109%
August	36	36	0	72	4,270	515	512	130	5,427	5,499	38	519	0	557	0	0	0	3,309	3,309	6,056	2,190	332,097	302,245	110%
September	13	50	0	63	4,121	562	284	138	5,105	5,168	2	522	0	524	0	0	0	3,440	3,440	5,692	1,728	333,825	302,245	110%
October	24	103	0	127	3,446	370	220	148	4,184	4,311	71	531	0	602	0	0	0	2,954	2,954	4,913	1,357	335,182	302,245	111%
November	32	99	0	131	3,751	411	293	123	4,578	4,709	2	503	0	505	0	0	0	2,677	2,677	5,214	2,032	337,214	302,245	112%
December	17	65	0	82	3,326	478	300	141	4,245	4,327	0	747	0	747	0	0	0	2,968	2,968	5,074	1,359	338,573	302,245	112%
YTD Total	**409**	**848**	**0**	**1,257**	**58,275**	**9,827**	**5,560**	**2,177**	**75,839**	**77,096**	**8,290**	**13,870**	**10,589**	**32,749**	**3,576**	**161**	**377**	**36,219**	**40,333**	**109,845**	**36,763**	**338,573**	**302,245**	**112%**

[1] Enrollments via data sharing between the IOUs.

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

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

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

	A	B	C	D	E	F	G	H	I
1	**SDG&E PY 2020 CARE Annual Report**								
2	**CARE Table 3A - Post-Enrollment Verification Results (Model) 2020**								
3	**Month**	**Total CARE Households Enrolled**	**Households Requested to Verify[1]**	**% of CARE Enrolled Requested to Verify Total**	**CARE Households De-enrolled (Due to no response)**	**CARE Households De-enrolled (Verified as Ineligible)[2]**	**Total Households De-enrolled[3]**	**% De-enrolled through Post Enrollment Verification[4]**	**% of Total CARE Households De-enrolled**
4	**January**	302,943	533	0.18%	8	53	61	11%	0.02%
5	**February**	304,015	180	0.06%	3	13	16	9%	0.01%
6	**March**	310,074	26	0.01%	0	2	2	8%	0.00%
7	**April**	316,330	0	0.00%	0	0	0	0%	0.00%
8	**May**	323,082	0	0.00%	0	0	0	0%	0.00%
9	**June**	326,930	0	0.00%	0	0	0	0%	0.00%
10	**July**	329,907	1	0.00%	0	0	0	0%	0.00%
11	**August**	332,097	1	0.00%	0	1	1	100%	0.00%
12	**September**	333,825	0	0.00%	0	0	0	0%	0.00%
13	**October**	335,182	0	0.00%	0	0	0	0%	0.00%
14	**November**	337,214	0	0.00%	0	0	0	0%	0.00%
15	**December**	338,573	0	0.00%	0	0	0	0%	0.00%
16	**YTD Total**	**338,573**	**741**	**0.22%**	**11**	**69**	**80**	**11%**	**0.02%**
17									
18	[1] Includes all customers who failed SDG&E's CARE eligibility probability model.								
19	[2] Includes customers verified as over income or who requested to be de-enrolled.								
20	[3] Verification results are tied to the month initiated and the verification process allows customers 90 days to respond to the verification request. Results may be pending								
21	[4] Percentage of customers dropped compared to the total participants requested to provide verification in that month.								
22									
23	**SDG&E PY 2020 CARE Annual Report**								
24	**CARE Table 3B Post-Enrollment Verification Results (Electric only High Usage)**								
25									
26	**Month**	**Total CARE Households Enrolled**	**Households Requested to Verify [1]**	**% of CARE Enrolled Requested to Verify Total**	**CARE Households De-enrolled (Due to no response)**	**CARE Households De-enrolled (Verified as Ineligible) [2]**	**Total Households De-enrolled [3]**	**% De-enrolled through HUV Post Enrollment Verification**	**% of Total CARE Households De-enrolled**
27	**January**	302,943	238	0.08%	38	14	52	22%	0.02%
28	**February**	304,015	147	0.05%	2	1	3	2%	0.00%
29	**March**	310,074	47	0.02%	0	0	0	0%	0.00%
30	**April**	316,330	14	0.00%	0	0	0	0%	0.00%
31	**May**	323,082	1	0.00%	0	0	0	0%	0.00%
32	**June**	326,930	0	0.00%	0	0	0	0%	0.00%
33	**July**	329,907	4	0.00%	0	0	0	0%	0.00%
34	**August**	332,097	2	0.00%	1	0	1	50%	0.00%
35	**September**	333,825	6	0.00%	2	0	2	33%	0.00%
36	**October**	335,182	2	0.00%	0	0	0	0%	0.00%
37	**November**	337,214	2	0.00%	0	1	1	50%	0.00%
38	**December**	338,573	2	0.00%	0	0	0	0%	0.00%
39	**YTD Total**	**338,573**	**465**	**0.14%**	**43**	**16**	**59**	**13%**	**0.02%**
40									
41	[1] Includes all participants who were selected for high usage verification process.								
42	[2] Includes customers verified as over income, who requested to be de-enrolled, did not reduce usage, or did not agree to be weatherized.								
43	[3] Medium (400%) and high usage (600%) customers are dropped at 60 days (2 or 3 bill cycles) for non-response to HUV (high usage income verification request). Additionally, 600% + users that have not reduced usage within the 60 day window (2 or 3 bill cycles) are removed from the program. Results may be pending due to the time permitted for a participant to respond.								
44									

	A	B	C	D	E	F	G
1	**SDG&E PY 2020 CARE Annual Report**						
2	**CARE Table 4**						
3	**CARE Self-Certification and Self-Recertification Applications[1]**						
4		**Provided**	**Received**	**Approved**	**Denied**	**Pending/Never Completed**	**Duplicates**
5	Total (Y-T-D)	6,424	136,376	76,719	19,203	4	40,450
6	Percentage		100%	56%	14%	0%	30%
7							
8	[1] Includes sub-metered customers.						
9							

	A	B	C	D	E	F	G	H	I	J
1	**SDG&E PY 2020 CARE Annual Report**									
2	**CARE Table 5**									
3	**CARE Enrollment by County**									
4	**County**	**Estimated Eligible**			**Total Participants**			**Penetration Rate**		
5		**Urban**	**Rural [1]**	**Total**	**Urban**	**Rural**	**Total**	**Urban**	**Rural**	**Total**
6	Orange	14,908	0	14,908	14,654	0	14,654	98%	0%	98%
7	San Diego	281,284	6,053	287,337	316,486	7,433	323,919	113%	123%	113%
8	**Total**	**296,192**	**6,053**	**302,245**	**331,140**	**7,433**	**338,573**	**112%**	**123%**	**112%**
9										
10										
11	[1] Rural includes zip codes classified as such according to the Goldsmith modification that was developed to identify small towns and rural areas within large metropolitan counties.									
12										

	A	B	C	D	E	F	G	H
1	**SDG&E PY 2020 CARE Annual Report**							
2	**CARE Table 6**							
3	**CARE Recertification Results**							
4	**2020**	**Total CARE Households**	**Households Requested to Recertify [1]**	**% of Households Total (C/B)**	**Households Recertified [2, 5]**	**Households De-enrolled [3, 5]**	**Recertification Rate % [4] (E/C)**	**% of Total Households De-enrolled (F/B)**
5	January	302,943	2,279	0.8%	2,075	110	91%	0.04%
6	February	304,015	1,233	0.4%	1,122	32	91%	0.01%
7	March	310,074	349	0.1%	299	3	86%	0.00%
8	April	316,330	0	0.0%	0	0	0%	0.00%
9	May	323,082	0	0.0%	0	0	0%	0.00%
10	June	326,930	5	0.0%	0	0	0%	0.00%
11	July	329,907	1	0.0%	0	0	0%	0.00%
12	August	332,097	3	0.0%	0	0	0%	0.00%
13	September	333,825	1	0.0%	0	0	0%	0.00%
14	October	335,182	0	0.0%	0	0	0%	0.00%
15	November	337,214	1	0.0%	0	0	0%	0.00%
16	December	338,573	1	0.0%	0	0	0%	0.00%
17	**YTD**	**338,573**	**3,873**	**1.14%**	**3,496**	**145**	**90%**	**0.04%**
18								
19	[1] Excludes count of customers recertified through the probability model.							
20	[2] Recertification results are tied to the month initiated and the recertification process allows customers 90 days (3 or 4 bill cycles) to respond to the recertification request. Results may be pending due to the time permitted for a participant to respond.							
21	[3] Includes customers who did not respond or who requested to be de-enrolled.							
22	[4] Percentage of customers recertified compared to the total participants requested to recertify in that month.							
23	[5] There were 3,654 accounts that were excluded from Households Recertified or De-Enrolled process due to any one of the following reasons: account was selected for high usage, account was selected for PEV (show proof of eligibility), or account closed.							
24								

	A	B	C	D	E	F	G	H	I
1	**SDG&E PY 2020 CARE Annual Report**								
2	**CARE Table 7**								
3	**CARE Capitation Contractors**								
4	**Contractor Name [1]**	**Contractor Type (Check one or more if applicable)**				**Enrollments[2]**			**Total Expenditures**
5		**Private**	**CBO**	**WMDVBE**	**LIHEAP**	**Rural**	**Urban**	**Total**	
6	211 SAN DIEGO		X			32	1,526	1,558	$ 31,320
7	211 ORANGE COUNTY		X			-	3	3	$ 100
8	AMERICAN RED CROSS WIC		X	X		-	4	4	$ 360
9	CATHOLIC CHARITIES		X			-	-	-	$ 220
10	CHULA VISTA COMMUNITY COLLABORATIVE		X			-	5	5	$ 560
11	COMMUNITY RESOURCE CENTER		X			-	6	6	$ 120
12	HEARTS AND HANDS TOGETHER		X			-	-	-	$ -
13	HOMESTART.ORG		X			-	-	-	$ -
14	HORN OF AFRICA		X			-	-	-	$ -
15	INTERFAITH COMMUNITY		X			-	2	2	$ 140
16	LA MAESTRA FAMILY CLINIC		X			-	-	-	$ -
17	MAAC PROJECT - CARE		X		X	-	17	17	$ 380
18	NEIGHBORHOOD HEALTH CARE		X			-	2	2	$ 160
19	NEIGHBORHOOD HEALTH INSURANCE CENTER	X				-	-	-	$ -
20	NORTH COUNTY HEALTH SERVICES		X			-	3	3	$ 420
21	SAN DIEGO STATE UNIVERSITY WIC		X			1	12	13	$ 2,280
22	SAN YSIDRO HEALTH CENTERS		X			-	13	13	$ 1,100
23	SCRIPPS HEALTH WIC (SHW)		X			-	3	3	$ 320
24	UNION OF PAN ASIAN COMMUNITIES (UPAC)		X			-	-	-	$ -
25	VISTA COMMUNITY CLINIC		X			-	1	1	$ 20
26	**Total Enrollments and Expenditures**					**33**	**1,597**	**1,630**	**$ 37,500**
27									
28									
29	[1] All capitation contractors with current contracts are listed regardless of whether they have signed up customers or submitted invoices this year.								
30	[2] Enrollments reflect new enrollments only.								
31									

	A	B	C	D	E	F	G	H
1	**SDG&E PY 2020 CARE Annual Report**							
2	**CARE Table 8**							
3	**CARE Participants as of Month-End**							
4	**2020**	**Gas and Electric**	**Gas Only**	**Electric Only**	**Total**	**Eligible Households**	**Penetration Rate**	**% Change**
5	**January***	190,090	N/A	112,853	302,943	302,245	100%	0.71%
6	**February**	190,754	N/A	113,261	304,015	302,245	101%	0.35%
7	**March**	194,938	N/A	115,136	310,074	302,245	103%	2.00%
8	**April**	199,038	N/A	117,292	316,330	302,245	105%	2.07%
9	**May**	203,568	N/A	119,514	323,082	302,245	107%	2.23%
10	**June**	206,031	N/A	120,899	326,930	302,245	108%	1.27%
11	**July**	207,974	N/A	121,933	329,907	302,245	109%	0.98%
12	**August**	209,561	N/A	122,536	332,097	302,245	110%	0.72%
13	**September**	210,724	N/A	123,101	333,825	302,245	110%	0.57%
14	**October**	211,670	N/A	123,512	335,182	302,245	111%	0.45%
15	**November**	212,971	N/A	124,243	337,214	302,245	112%	0.67%
16	**December**	213,934	N/A	124,639	338,573	302,245	112%	0.45%
17								
18	*Note: Due to changes in customer accounts from Net Metering and solar adoption; SDG&E developed a more accurate way of reporting CARE customer commodity service types in 2019. This resulted in a correction of customer counts for the number of Gas and Electric customers versus Electric Only customers.							
19								

	A	B	C	D
1	**SDG&E PY 2020 CARE Annual Report**			
2	**CARE Table 9**			
3	**CARE Average Monthly Usage & Bill**			
4				
5	**Average Monthly Gas / Electric Usage**			
6	**Residential Non-CARE vs. CARE Customers**			
7	**Customer**	**Gas Therms**	**Gas Therms**	**Total**
8		**Tier 1**	**Tier 2**	
9	Non-CARE	20.5	6.3	26.8
10	CARE	17.9	2.3	20.2
11	**Customer**	**Electric KWh**	**Electric KWh**	**Total**
12		**Tier 1**	**Tier 2 and Above**	
13	Non-CARE	298	136	434
14	CARE	298	85	383
15				
16				
17	**Average Monthly Gas / Electric Bill[2]**			
18	**Residential Non-CARE vs. CARE Customers[1]**			
19	**(Dollars per Customer)**			
20	**Customer**	**Gas**	**Electric**	
21	Non-CARE	$46.01	$123.64	
22	CARE	$26.48	$67.14	
23				
24				
25	[1] Excludes master-meter usage.			
26	2 Average Monthly Gas/Electric Bill reflects residential Non-CARE (CARE) 2020 total billed.			
27				

	A	B	C	D	E	F
1	**SDG&E PY 2020 CARE Annual Report**					
2	**CARE Table 10**					
3	**CARE Surcharge & Revenue**					
4	**Electric**					
5	**CARE Surcharge and Revenue Collected by Customer Class**					
6						
7	Customer	Average Monthly		CARE Surcharge	Total CARE Surcharge Revenue	Percentage of CARE Surcharge
8	Class	CARE Surcharge[1]	Monthly Bill	as Percent of Bill	Collected	Revenue Collected
9	Residential	$3.00	$113	2.66%	$36,201,681	31.20%
10	Commercial	$26.50	$845	3.14%	$47,763,139	41.16%
11	Agricultural	$46.78	$1,099	4.26%	$2,262,421	1.95%
12	Large/Indust	$4,172.03	$74,659	5.59%	$29,813,297	25.69%
13						
14						
15						
16	**GAS**					
17	**CARE Surcharge and Revenue Collected by Customer Class**					
18						
19	Customer	Average Monthly		CARE Surcharge	Total CARE Surcharge Revenue	Percentage of CARE Surcharge
20	Class	CARE Surcharge[2]	Monthly Bill	as Percent of Bill	Collected	Revenue Collected
21	Residential	$0.77	$44	1.76%	$6,100,452	47.51%
22	Commercial	$13.06	$326	4.01%	$4,727,173	36.82%
23	Natural Gas Vehicle	$1,486.68	$20,875	7.12%	$622,918	4.85%
24	Industrial	$2,248.50	$14,936	15.05%	$1,389,575	10.82%
25						
26	[1] Excludes CARE customers. Pursuant to D. 15-07-001, OP 4 and Section 11.1.1 authorizes adjustments to CARE to transition to the legislatively-mandated CARE discount range in compliance with Section 739.1 were authorized. Effective 9/1/15 per AL 2783-E, CARE customers receive non-CARE rates; therefore, there is no longer a CARE Rate subsidy.					
27	[2] Excludes CARE customers.					
28						

	A	B	C	D	E	F
1	**SDG&E PY 2020 CARE Annual Report**					
2	**CARE Table 11**					
3	**CARE Capitation Applications[1]**					
4	**Entity**	**Total Received**	**Approved[2]**	**Denied**	**Pending/ Never Completed**	**Duplicate**
5	211 SAN DIEGO	2,672	2,120	115	0	437
6	ALLIANCE FOR AFRICAN ASSISTANCE	3	3	0	0	0
7	AMERICAN RED CROSS	15	4	0	0	11
8	CATHOLIC CHARITIES	4	0	0	0	4
9	CHILDREN'S INITIATIVE	0	0	0	0	0
10	CHULA VISTA COMMUNITY COLLABORATIVE	16	6	1	0	9
11	COMMUNITY RESOURCE CENTER	133	15	6	0	112
12	CRISIS HOUSE	0	0	0	0	0
13	DEAF COMMUNITY SERVICES	0	0	0	0	0
14	FAMILY HEALTH CENTERS OF SAN DIEGO	0	0	0	0	0
15	HEARTS AND HANDS TOGETHER	0	0	0	0	0
16	HORN OF AFRICA	0	0	0	0	0
17	INTERFAITH COMMUNITY	2	2	0	0	0
18	LA MAESTRA FAMILY CLINIC	0	0	0	0	0
19	MAAC PROJECT - CARE	544	47	7	0	490
20	NEIGHBORHOOD HEALTH CARE	19	4	1	0	14
21	NEIGHBORHOOD HEALTH INSURANCE CENTER	0	0	0	0	0
22	NORTH COUNTY HEALTH SERVICES	20	6	0	0	14
23	SAN DIEGO STATE UNIVERSITY WIC	45	23	0	0	22
24	SAN YSIDRO HEALTH CENTERS	43	20	1	0	22
25	SCRIPPS HEALTH WIC (SHW)	7	4	0	0	3
26	VISTA COMMUNITY CLINIC	3	1	0	0	2
27	**Total**	**3,526**	**2,255**	**131**	**0**	**1,140**
28						
29	[1] Includes sub-metered customers.					
30	[2] Includes new enrollments and recertification applications approved.					
31						

	A	B	C	D	E	F	G
1	**SDG&E PY 2020 CARE Annual Report**						
2	**CARE Table 12**						
3	**CARE Expansion Program**						
4							
5	**Participating Facilities by Month[2]**						
6	**2020**	**Gas**			**Electric**		
7		**CARE Residential Facilities**	**CARE Commercial Facilities**	**Total Gas**	**CARE Residential Facilities**	**CARE Commercial Facilities**	**Total Electric**
8	**January**	229	115	344	441	185	626
9	**February**	229	115	344	436	185	621
10	**March**	226	115	341	431	185	616
11	**April**	238	114	352	436	181	617
12	**May**	241	114	355	442	180	622
13	**June**	237	113	350	446	180	626
14	**July**	240	113	353	447	184	631
15	**August**	240	113	353	451	183	634
16	**September**	233	113	346	465	185	650
17	**October**	233	114	347	469	185	654
18	**November**	230	116	346	467	185	652
19	**December**	224	115	339	465	185	650
20							
21							
22	**Average Monthly Gas / Electric Usage[1]**						
23	**Customer**	**Gas**	**Electric**				
24		**Therms**	**KWh**				
25	Residential Facilities	37	520				
26	Commercial Facilities	509	10,358				
27							
28							
29	**CARE Expansion Self-Certification and Self-Recertification Applications**						
30		**Received**	**Approved**	**Denied**	**Pending/Never Completed**	**Duplicates**	
31	Total	10	10	0	0	0	
32	Percentage		100%	0%	0%	0%	
33							
34							
35	[1] Excludes master meter usage.						
36							

	A	B	C	D	E	F	G	H	I	J
1	**SDG&E PY 2020 CARE Annual Report**									
2	**CARE Table 13**									
3	**CARE High Usage Verification Results[5]**									
4	**Stage 1 - IRS Documentation and ESA Agreement**				**Stage 2 - ESA Participation**			**Stage 3 - Usage Monitoring**		
5	**Households Requested to Verify**	**Removed (No Response)**	**Removed (Verified Ineligible)[1]**	**Income Verified and Referred to ESA**	**Failed and Removed[2]**	**Ineligible[3]**	**Completed**	**Removed[4]**	**Appeals Denied**	**Appeals Approved**
6	465	43	16	297	2	297	0	8	0	5
7										
8	[1] Includes customers who were verified as over income, requested to be removed, or did not agree to participate in ESA Program.									
9	[2] Includes customers who declined to participate in ESA Program, failed to respond to appointment requests, or missed multiple appointments or denied access to all rooms.									
10	[3] Includes customers who previously participated in ESA Program, did not meet the three-measure minimum, landlord refused, etc. These customers move directly to Stage 3.									
11	[4] Customers removed for exceeding 600% of baseline in any monthly billing cycle.									
12	[5] High usage is defined as a customer that exceeds 400% or 600% of baseline.									
13										
14										

	A	B	C	D	E	F	G	H	I
1	**SDG&E PY 2020 CARE Annual Report**								
2	**CARE Table 13A**								
3	**CARE Customer Usage and ESA Program Treatment**								
4									
5	# of CARE customers at or above 90th Percentile of Usage Not subject to High Usage PEV *1	Percent of those CARE customers Not served by ESA Progra *3	# of Enrollments led to ESA Program measure Installations *4	# of Long-Term tenancy CARE customers who have Not applied for ESA Program *2	Energy Usage of Long-Term Tenancy CARE Customers who Accept ESA Program Treatment				Energy Usage of CARE customers who do Not accept ESA Program treatment *9
6					Energy Usage before ESA Program treatment8 *5	Energy Usage within 3-months of ESA Program treatment *6	Energy Usage within 6-months of ESA Program treatment *7	Energy Usage within 12-months of ESA Program treatment *8	
7	5,414	50%	35	2,733	680kWh	737kWh	776kWh	N/A	684kWh
8									
9									
10	*								
11	1 - As of November 2020, 4966 CARE accounts identified as customers who have been on CARE rate at the same meter for a least six years and have 90th Percentile of high usage. was generated in June 2020 and November 2020.								
12	2 - CARE customers who did not participated in the ESA Program before June and November2020 campaigns								
13	3 - Percentage of CARE customers not served by ESA: *2/*1(2733/5414= 50%)								
14	4 - Among those targeted 2454 accounts, 35 accounts enrolled in ESA as of March 2021 after campaigns took place in June and November 2020. Number of months in ESA preprogram vary among accounts.								
15	5 - Average monthly kWh in 12 months prior to ESA enrollment. Usage starting and ending month vary on accounts depending on ESA enrollment dates.								
16	6 - Average monthly kWh 3 months after ESA enrollment. Only including accounts enrolled more than 3 months as March 2021 in the calculation. Usage starting and ending month vary on accounts depending on ESA enrollment dates. Average usage may affect by seasonal fluctuation and number qualified accounts included in the calculation.								
17	7 - Average monthly kWh 6 months after ESA enrollment. Only including accounts enrolled more than 6 months as March 2021in the calculation. Usage starting and ending month vary on accounts depending on ESA enrollment dates. Average usage may affect by seasonal fluctuation and number qualified accounts included in the calculation.								
18	8 - Do not have 12-months of Energy Usage								
19	9 - Average monthly kWh of those targeted accounts which have not enrolled in ESA as of Mar 2021 (*3 -*4: 2733 - 35 = 2698) Usage months based on 12 months before the last campaign in Nov 2020 (from Nov 2019 to Oct 20).								
20									

	A	B
1	**SDG&E PY 2020 CARE Annual Report**	
2	**CARE Table 14**	
3	**Categorical Enrollment**	
4	**Type of Enrollment**	**Number of Customer Enrollments[1]**
5	Bureau of Indian Affairs General Assistance	54
6	CalFresh/Supplemental Nutrition Assistance Program - Food Stamps	20,085
7	CalWORKs/Temporary Assistance for Needy Families (TANF)[2]	1,972
8	Head Start Income Eligible - (Tribal Only)	252
9	Healthy Families A&B	41,070
10	Low-income Home Energy Assistance Program (LIHEAP)	2,517
11	Medicaid/Medi-Cal	408
12	National School Lunch Program (NSLP) - Free Lunch	10,509
13	Supplemental Security Income (SSI)	7,609
14	Tribal TANF[2]	N/A
15	Women, Infants, and Children Program (WIC)	7,104
16		
17		
18		
19	[1] Number of customers enrolled reflects categorical programs selected by customer. Customers may select more than one eligible program for a single account.	
20	[2] CalWORKS and Tribal TANF are combined categorical programs with no distinction between the two programs.	
21		